# CallPilot Fax Set Up and Operation Guide

**BCM50 3.0**
CallPilot

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# Chapter 1
# Getting started

## About this Guide

The *CallPilot Fax Set Up and Operation Guide* describes how to configure CallPilot fax on a Business Communications Manager (BCM) using CallPilot Manager and telset based administration.

### About CallPilot Fax

Fax is a CallPilot option that enhances your office communications by providing incoming and outgoing fax capability. With Fax, callers can send and retrieve fax messages as easily as they send and retrieve voice messages. The Fax option includes Fax Mail, Fax On Demand and Fax Overflow. Fax Answering is available even if you do not have the Fax option installed on your system.

Fax Answering lets outside callers send faxes to the main site telephone number. With Fax Answering, a fax call that arrives through the Auto Attendant or CCR transfers to a specified extension. The extension is usually a fax machine connected to an analog telephone port on the system.

For more information about each of the Fax components, see "Learning about Fax" on page 8.

To use Fax on your system, you must enable a Fax keycode. Contact your vendor if you want to trial or purchase Fax. For information about enabling a keycode see the *Keycode Installation Guide*.

### Who can use Fax

Fax can be used by any outside caller or mailbox owner in your company. Away from the office, Fax can be used from any touchtone telephone. At the office, Fax can be used from any Business Series Terminal or touchtone telephone connected to a CallPilot system.

Callers who use a rotary dial telephone cannot access Fax.

### Requirements for setting up Fax

To set up and operate CallPilot Fax you need to know:

- how to use Business Series Terminals.
  See "Initializing a mailbox" on page 12 for information on using telephone buttons and the *CallPilot Reference Guide* for information on telephone displays.

- how to initialize a mailbox.
  See "Initializing a mailbox" on page 12 for specific information.

- which mailbox interface you use.
  See the "Checking which mailbox interface you use" on page 13 for information on how to check which interface you use.

- how to start CallPilot Manager and use the CallPilot Manager interface.
  For information see the *CallPilot Manager Set Up and Operation Guide.*

- how to set up Custom Call Routing (CCR).
  For information see the *CallPilot Manager Set Up and Operation Guide.*

- how to enable a keycode.
  For information about enabling a keycode see the *Keycode Installation Guide*.

## Learning about Fax

CallPilot Fax includes:

- Fax Answering
- Fax Mail
- Fax On Demand
- Fax Overflow

### About Fax Answering

Fax Answering lets outside callers send faxes to the main site telephone number. Fax Answering is available even if you do not have the Fax option installed on your system. With Fax Answering, a fax call that arrives through the Auto Attendant or CCR transfers to a specified extension. The extension is usually a fax machine connected to an Analog Telephone port on the system.

### About Fax Mail

Fax Mail lets callers leave a fax message in a subscriber mailbox. The subscriber can print the fax message on a fax machine. Callers can leave a voice message to introduce the fax document.

### About Fax On Demand

With Fax On Demand, callers can retrieve documents stored in Fax On Demand mailboxes.

You can create a Fax On Demand mailbox to make a collection of faxes available to callers. A Fax On Demand mailbox has a greeting that plays to callers and a collection of fax messages, each with a document number. Callers hear the mailbox greeting and can select a fax document by its assigned number.

You create the Fax On Demand mailbox and give it to the department. The department creates the password, records the greeting and maintains the fax documents.

Callers can access a Fax On Demand mailbox:

- from the Auto Attendant, by mailbox number or directory name lookup

- from Feature 980 (Leave Message) or Feature 986 (Transfer Caller to Mailbox)
- through Custom Call Routing, as either a Home node or a Mailbox node

### About Fax Overflow

With Fax Overflow, you can set up a Fax Overflow mailbox. If your fax machine cannot answer an incoming fax call, CallPilot answers the call and temporarily stores the fax message in a Fax Overflow mailbox. When the fax machine is ready to print, CallPilot sends the stored fax messages to the fax machine.

If CallPilot cannot send the fax messages on the first attempt, it tries to send the documents several more times. The number of retry attempts can be from 1 to 99. Between each retry attempt, CallPilot waits a specified amount of time. The interval of time can be from 1 to 60 minutes.

### Storage limit for Fax Overflow mailboxes

A Fax Overflow mailbox does not have an explicit storage limit. It accepts new messages until the system storage is full. If there is no space available, it still answers calls, but disconnects the call when it discovers there is no space left.

### Retry limit for Fax Overflow mailboxes

If the retry limit is reached for a fax message, the message is automatically sent to the General Delivery Mailbox. You can open the General Delivery Mailbox and forward the fax messages to a fax machine connected to the system. Check the General Delivery mailbox regularly. You can set up Off-premise Message Notification to notify you when a message is received in the General Delivery Mailbox. For more information about the General Delivery Mailbox, see the *CallPilot Manager Set Up and Operation Guide*.

## CallPilot Fax features

You can set up other CallPilot Fax features that maximize your company's fax efficiency:

- assign a subscriber an Express Messaging Line as a private fax line
- create Fax Group Lists to send group fax messages
- add Fax On Demand functionality to CCR Trees
- generate CallPilot reports to check how Fax is set up and how frequently Fax is accessed on your system

### About the Express Messaging Line

You can assign an Express Messaging Line to a Subscriber mailbox. Any fax calls sent to the Express Messaging Line bypass the Automated Attendant. The system detects the calling fax machine's fax tone, and the fax message is immediately sent to the subscriber's mailbox. A line that is to be used as an Express Messaging Line must be configured not to appear or ring at any set. You must assign the Voice Mail DN as the prime set for the line. An Express Messaging Line can

be set up as Fax Only. If the Fax Only option is selected, the caller will not hear a greeting and will not be able to leave a voice message. Selecting this option allows a fax to be sent immediately. For information about assigning an Express Messaging Line and creating subscriber mailboxes, see the *CallPilot Manager Set Up and Operation Guide*.

The line used for Express Messaging must be between 125 and 268 for BCM50. Give the corresponding telephone number to the subscriber. For example, if line 125 is chosen as the Express Messaging Line, give the corresponding telephone number of 735-5822 to the subscriber. The subscriber can then inform people that the Express Messaging Line number is their fax number and have it printed on their business cards.

If you are using the Express Messaging Line as a virtual fax line and the line used is either a Direct Inward Dial (DID) or a Target Line, two callers can send a fax to the same fax line at the same time. The resulting two fax messages go to the mailbox. If a third fax is sent to the Express Messaging Line and the line is busy, the caller hears a message that asks them to wait or cancel their call. For information about Fax Overflow for a fax line, see *CallPilot Manager Set Up and Operation Guide*.

### About Fax Group Lists

You can create a Fax Group List and send Group List messages to it. Send a Fax Group List message to notify a group by fax of a message or event that pertains to the group.

A Fax Group List is a collection of fax machines from other locations. When you send a fax message to a Group List, each fax machine in the Group List receives the same fax message. You can publish a list of fax machines in each Fax Group List so that mailbox owners know which fax machines receive Group List messages.

For more information about Group Lists, see "Sending a Fax Group message" on page 29.

### About adding a Fax On Demand mailbox to a CCR Tree

You can add Fax On Demand functionality to Custom Call Routing (CCR) Trees.

If you want callers to be able to request faxes from a CCR Tree, add a Mailbox node to a CCR Tree. When you add the mailbox, assign a Fax On Demand mailbox as the mailbox number.

If you want callers to be able to leave fax messages in a mailbox, add a Mailbox node to a CCR Tree. When you add the mailbox, assign a Subscriber mailbox as the mailbox number.

For more information about using Fax On Demand with CCR, see "Adding a Fax On Demand mailbox" on page 31.

## About CallPilot reports

You can generate CallPilot reports to see how Fax is set up on your system and how frequently Fax is accessed.

**The CallPilot reports that show Fax information**

| | |
|---|---|
| **Mailbox Information report** | Lists Fax Overflow mailboxes.<br><br>For Fax On Demand mailboxes shows:<br>• delivery method<br>• maximum number of faxes<br>• number of retry attempts<br>• interval in minutes between retry attempts<br>• selection ID of each fax<br>• size in message minutes of each fax |
| **Directory report** | Shows which mailboxes are Fax On Demand. |
| **CCR Tree Usage report** | Shows which nodes are Fax On Demand mailboxes, and when they were accessed. |
| **Fax Usage report** | For Fax On Demand mailboxes shows:<br>• Fax On Demand requests<br>• date and time of faxes<br>• document number requested<br>• delivery fax number<br>• CLID of callers |

For more information about CallPilot reports, see the *CallPilot Manager Set Up and Operation Guide*.

## Initializing a mailbox

Initializing a mailbox prepares your mailbox to receive messages. A mailbox cannot receive and store messages until it is initialized.

Initializing a mailbox involves:

- choosing a password from four to eight digits long that does not start with zero
- changing the CallPilot default password to the new password
- recording a mailbox name in the Company Directory

**Note:** You do not initialize a Fax Overflow mailbox before it receives fax messages. CallPilot automatically sends the faxes to the Fax Overflow mailbox if your fax machine cannot answer an incoming fax call. CallPilot answers the call and temporarily stores the fax message in a Fax Overflow mailbox.

## To initialize a mailbox

**1** Press [ ] [9] [8] [1].

**2** Log on by following the prompts.

```
Must change pswd
```

**3** This display appears briefly to indicate that you must change your password.

```
Pswd:
RETRY              OK
```

**4** Enter a new password from four to eight digits long that does not start with zero.
Press OK or [#].

```
Again:
RETRY              OK
```

**5** Re-enter your new mailbox password and press OK or [#].

```
Record name:
RETRY              OK
```

**6** At the tone, record the mailbox name in the Company Directory. Include the mailbox number in the recording, For example, "*Paddy's Dance Studio fax, mailbox 5813*."
Press OK or [#] to end the recording.

```
Accept name?
RETRY    PLAY      OK
```

**7** Press OK or [#] to accept the recording
or
press PLAY or [1] to listen to the recording
or
press RETRY or [2] to re-record your name.

**8** Press [ ] to end the session.

## Checking which mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot.

Use this procedure to check which mailbox interface you use, then follow the procedures in the guide that apply to the interface you use.

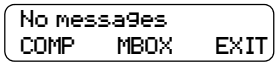
Some procedures apply to both interfaces.

## To check which mailbox interface you use

1. Press [ ] 9 8 1.
   Follow the voice prompts or the display options buttons to open your mailbox.
2. Check the display to see which interface you use:




This is the Norstar Voice Mail interface.




This is the CallPilot interface.

3. Press [ ] to end the session.

# Audience

This guide is for system administrators who configure and maintain CallPilot on a Business Communications Manager. To use this guide you must be an authorized system administrator.

# Acronyms

The following is a list of acronyms used in this guide.

**Table 1**

| Acronym | Description |
|---|---|
| BCM | Business Communications Manager |
| CCR | Custom Call Routing |
| CLID | Calling Line Identification |

**Table 1**

| Acronym | Description |
|---|---|
| DID | Direct Inward Dial |
| DN | Directory Number |

## Symbols and text conventions

These symbols are used to Highlight critical information for the BCM50 system:



**Caution:** Alerts you to conditions where you can damage the equipment.



**Danger:** Alerts you to conditions where you can get an electrical shock.



**Warning:** Alerts you to conditions where you can cause the system to fail or work improperly.



**Note:** Alerts you to important information.



**Tip:** Alerts you to additional information that can help you perform a task.



**Security note:** Indicates a point of system security where a default should be changed, or where the administrator needs to make a decision about the level of security required for the system.



**Warning:** Alerts you to ground yourself with an antistatic grounding strap before performing the maintenance procedure.



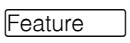
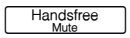
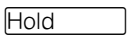
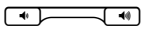
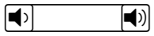
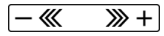
**Warning:** Alerts you to remove the BCM50 main unit and expansion unit power cords from the ac outlet before performing any maintenance procedure.

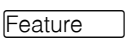
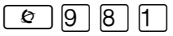
These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

| Convention | Example | Used for |
|---|---|---|
| Word in a special font (shown in the top line of the display) | Pswd: | Command line prompts on display telephones. |
| Underlined word in capital letters (shown in the bottom line of a two line display telephone) | PLAY | Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed. |
| Dialpad buttons | # | Buttons you press on the dialpad to select a particular option. |

## About telephone buttons

This table shows the Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

| Button name | T7100, T7208, T7316 | M7100, M7208, M7310, M7324 | M7100N, M7208N, M7310N, M7324N |
|---|---|---|---|
| Feature |  |  |  |
| Handsfree | Bottom right-hand button |  |  |
| Hold |  |  |  |
| Volume Control |  |  |  |
| Release |  |  |  |

You can enter ,  or  and the code to use a feature.
For example, press  to access your mailbox.

The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press  on the T7100 terminal.

On T7100 terminals, you can answer a second call by pressing . Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

# Related Documents

This section provides a list of additional documents referred to in this guide.

*Keycode Installation Guide (NN40010-301)*

*CallPilot Manager Set Up and Operation Guide (NN40090-300)*

*CallPilot Reference Guide (NN40090-100)*

*CallPilot Fax User Guide (NN40080-100)*

# How to get Help

This section explains how to get help for Nortel products and services.

## Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

http://www.nortel.com/support

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

## Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

http://www.nortel.com/callus

## Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

http://www.nortel.com/erc

## Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

# Chapter 2
# Setting up CallPilot Fax

## the Fax properties



**Note:** If you use Business Communications Manager (BCM), before you set up fax properties, use Element Manager to:

- enable the fax keycode
- assign voice channels to fax

Refer to the *CallPilot Manager Set Up and Operation Guide* for details.

| | |
|---|---|
| **System extension** | The system fax extension lets callers use the autosend feature on their fax machines to send faxes to the CallPilot system. The Automated Attendant recognizes the fax tone and transfers fax calls to the system extension fax machine for printing. The system extension must be a valid extension. The system extension is not assigned by default.<br><br>Connect the fax machine to an Analog Telephone port on the system.<br><br>The system extension is available even if no Fax options are installed at your site. The other properties are available only if you have installed the corresponding fax options. |
| **System name** | The system name is a text name up to 16 characters long. The system name can be a company name, a department, a location or any other name. The name transmits to external fax machines at the beginning of fax messages. The system name is also printed in the fax machine's log files. |
| **Number of retries** | The number of retry attempts is the number of times that the system tries to print faxes. It is also the number of times the system tries to deliver faxes forwarded to an external fax machine. The number of retry attempts range from 1 to 99. The default number of Fax system retry attempts is 3.<br>If a fax messages reaches its retry attempt limit, CallPilot stops trying to send the message and generates a non-delivery notification message. The messages that are not sent are shown in the non-delivery notification message. Most non-delivery notification messages are caused by fax machine problems such as a paper jam or the fax machine running out of paper. |

| | |
|---|---|
| **Retry interval** | The number of minutes the system waits between retry attempts. The retry interval ranges from 1 to 60 minutes. The default Fax system retry interval time is 10 minutes.<br>The fax retry interval is used in two ways:<br>1. You send a fax to a single party (fax machine), but that fax machine is busy. The fax transmission is retried after the fax retry interval. (The default is 10 minutes.)<br>2. There are not enough resources to send the fax. For example, you send a fax to three parties, but your BCM configuration only supports two simultaneous fax sessions. The third fax is sent after the retry interval. (The default is 10 minutes.)<br>You can change the Number of retries and the Retry interval to optimize the rate of faxes being sent. For short faxes a lower Retry Interval works more efficiently. For longer faxes, which might take hours to send, you do not want to run out of retries. A higher number of retries would be better.<br>You decide what types of faxes are typical for your business, and then set the Number of retries and Retry interval accordingly. |
| **Cover page** | You can send the system cover page or a custom cover page with fax messages. You can create or select a template for the custom cover page. For more information about the cover page, see "Creating a custom cover page" on page 23. |

# Setting the Fax properties

## To set the Fax properties

1. Start CallPilot Manager.
2. Click the **Configuration** heading.
3. Click the **Fax Properties** link.
   The Fax Properties page appears.
4. In the **System Extension** box type the extension of your main fax machine.
5. In the **System Name** box type the system name.
   The system name can be a maximum of 16 characters. You can use your main fax number as the System Name.
6. In the **Number of Retries** box type the maximum number of attempts made to print or forward faxes to an external fax number. The default is 3. The range is 0-99.
7. In the **Retry Interval** box type the number of minutes to wait between retries. The default is 10. The range is 1-60.
8. Choose the cover page you want to use:
   - if you want to use the default cover page, select the **Default Cover Page** option
   - if you want to use a custom cover page, select the **Custom Cover Page** option, and in the **Load Custom Cover Page From** box type the location of the file you want to use, or click **Browse** and navigate to the file. For more information about the custom cover page see "Creating a custom cover page" on page 23.

**9** Click **Submit**.

You can set up the system extension with a Fax Overflow mailbox for improved performance. Refer to "Adding a Fax Overflow mailbox" on page 24.

# Changing the Fax properties

You can change any of the Fax properties at any time.

## To change the Fax properties

1. Start CallPilot Manager.
2. Click the **Configuration** heading.
3. Click the **Fax Properties** link.
   The Fax Properties page appears.
4. Make the changes you require to the Fax properties.
5. Click **Submit**.

# Creating a custom cover page

The fax image file you use for a custom fax cover page is:

- a single page that is 8.5 x 11 inches (215 mm x 280 mm)
- a two color (black and white) .tif file, with CCITT Group 3 (1d) Fax Compression with normal, (not-reversed) bit order
- of two possible image resolutions: 204x98 (normal resolution) or 204x196 (fine resolution)
- blank in the middle third of the page. This area is used by CallPilot for cover page information such as To: and From:, depending on the type of information being printed on the fax

You can create a custom cover page if you have Imaging for Windows on your computer. On Windows 98 and Windows NT, Imaging for Windows is sometimes called Wang Imaging. On Windows Me and Windows 2000, Imaging for Windows is sometimes called Kodak Imaging.

## To convert an image to a custom cover page

1. Create or find the image you want to use as a custom fax cover page.
   The image can be a .gif, .tif, .jpg, .bmp, or. pcx file.
2. Click the Windows **Start** button, point to **Programs**, point to **Accessories** and click **Imaging**.
   Imaging for Windows appears.
3. Open the graphic you want to use as a cover page.
4. On the **File** menu click **Save As**.
   The Save As dialog box appears.
5. Select the folder in which you want to create the new image.
6. From the **Save as type** list box, select **TIFF Document (*.tif)**.
7. Click **Save**.
8. On the **Page** menu click **Properties**.
   The Page Properties dialog box appears with the Color tab displayed.
9. Click the **Black and White** option.
10. Click the **Compression** tab and from the Compression list box select **CCITT Group 3 (1d) Fax**.
11. Click the **Resolution** tab and:
    - from the **Resolution** list box select **Custom**
    - set **X:** to **204**,
    - set **Y:** to **98** for normal resolution, or **196** for fine resolution

12 Click the **Size** tab and:

- from the **Size** list box select **Custom**
- in the **Width** box type **8.5**
- in the **Height** box type **11**
- from the **Units** list box select **Inches**

13 Click **OK.**

14 On the **File** menu click **Save**.

15 You can now exit Imaging for Windows.

# Selecting a cover page

After you create a custom cover page, upload it, or select the default cover page or no cover page.

## To select a cover page

1 Start CallPilot Manager.

2 Click the **Configuration** heading.

3 Click the **Fax Properties** link.

4 If you want to use a custom cover page, select the **Custom Cover Page** option, and in the **Load Custom Cover Page From** box, type the location of the custom cover page, or click **Browse** and locate the file you want to use as the cover page
or
If you do not want to use a custom cover page, select **Default Cover Page**
or
If you do not want to use a cover page, select **No Cover Page**.

5 Click **Submit**.

# Adding a Fax Overflow mailbox

A Fax Overflow mailbox is a mailbox for your fax machine. Add a Fax Overflow mailbox for each fax machine connected to the system. If a fax machine cannot answer an incoming fax call, the call is answered by CallPilot. The fax messages received are stored in the Fax Overflow mailbox. When the fax machine is ready to accept fax calls, CallPilot sends the messages stored in the Fax Overflow mailbox to the fax machine.



**Note:** You do not initialize a Fax Overflow mailbox before it receives fax messages.

## To add a Fax Overflow mailbox

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
3. Click the **Add Mailbox** link.
   The Add Mailbox page appears.
4. In the **Mailbox** box type the extension of the Fax Overflow machine.
5. From the **Mailbox Type** list box select **Fax Overflow**.
6. Click **Submit**.
   The Fax Overflow Mailbox page appears.
7. In the **Extension** box type the extension number of the Fax Overflow mailbox.
   This number is the same as the extension for the fax machine. Any faxes stored in the Fax Overflow mailbox are delivered to this fax machine.
8. In the **Last Name** box type the name of the Fax Overflow mailbox.
   This name can be a maximum of 16 characters.
9. Click **Submit**.
10. Click the **Change** link for the mailbox.
11. If you want to record a spoken name for the mailbox, click **Voice**.
    The page you can record from appears.
    If you do not want to record a spoken name for the mailbox, go to step 16.
12. In the **Connect to** box, type the extension number or telephone number you are using to record from.
    For a local extension, just type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voice mail system. For example, you might need to dial 9, the area code, and then the telephone number.
13. Click **Dial**.
    The telephone rings.
14. Pick up the handset. Do not use Handsfree. Click **Record**. After the tone, record the name of the Fax Overflow mailbox.
15. After you finish recording, click **Stop**.
16. To listen to the recording, click **Play**
    or
    to save the recording, click **Save**.
17. Click **Close** and replace your telephone handset.
    The page you record from closes and you return to the Fax Overflow Mailbox page.
18. In the **Fax Retries** box type the number of times to try to deliver queued faxes.
    Undelivered faxes go to the General Delivery Mailbox. This number can be between 1 and 99. The default is 99. This is the maximum number of attempts the system makes to deliver queued faxes before it abandons the attempt and sends the faxes to the General Delivery Mailbox.

19 In the **Fax Interval** box type the number of minutes to wait between delivery attempts. Set this interval to be as short as possible so that queued faxes get sent to the fax machine before it becomes busy with more incoming faxes. The number can be between 1 and 60 minutes. The default is 1.

20 Click **Submit**.

# Changing a Fax Overflow mailbox

You can change any property of a Fax Overflow mailbox except for the mailbox number. If you want to change a mailbox number, you must delete the mailbox and then create a new Fax Overflow mailbox. To delete a mailbox, see "Deleting a Fax Overflow mailbox" on page 26. To create a Fax Overflow mailbox, see "Adding a Fax Overflow mailbox" on page 24.

## To change the properties of a Fax Overflow mailbox

1 Start CallPilot Manager.

2 Click the **Mailbox Administration** heading.
The Mailbox List page appears.

3 Click the **Change** link for the Fax Overflow mailbox you want to modify.
The Fax Overflow Mailbox page appears.

4 Make the changes you require.

5 Click **Submit**.

# Deleting a Fax Overflow mailbox

You can delete a Fax Overflow mailbox at any time. Fax messages that are in the Fax Overflow mailbox before it is deleted are automatically printed.

## To delete a Fax Overflow mailbox

1 Start CallPilot Manager.

2 Click the **Mailbox Administration** heading.
The Mailbox List appears.

3 Click the **Delete** link for the Fax Overflow mailbox you want to delete.
A message appears that asks you to confirm the deletion.

4 Click **OK**.

# Creating a Fax Group List

A Fax Group List:

- is a list of external fax telephone numbers
- sends a fax message to multiple recipients
- can be used for applications such as faxing product announcements to distributors
- is available if the Fax option is installed at your site

A Fax Group List sends the same fax to all the members of a list. This eliminates sending the same fax several times. You can have a maximum total of 99 Voice and Fax Group Lists on your system.

Members of a Fax Group List are fax machines at other locations. These fax machines do not have to be connected to your system. These fax machines can have internal or external numbers.

Since not all the fax machine members of this list are connected to your system, you must specify the telephone number of the fax machine and the line or line pool. You can add a maximum of 125 fax machine members to a Fax Group List.

## To create a Fax Group List

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
3. Click the **Group Lists** link.
   The Group Lists page appears.
4. From the list box, select **Fax**, and click **Add**.
   The Group List page appears with the Fax Group List listed.
5. Click the **Change** link for the Fax Group List.
   The Group List Properties page appears.
6. If you want to record a spoken name for the Fax Group List, click **Voice**.
   The page you can record from appears.
   If you do not want to record a spoken name for the Fax Group List, go to step 12.
7. In the **Connect to** box, type the extension number or telephone number you are using to record from.
   For a local extension, just type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voice mail system. For example, you might need to dial 9, the area code, and then the telephone number.
8. Click **Dial**.
   The telephone rings.
9. Pick up the handset. Do not use Handsfree. Click **Record**. After the tone, record the name of the Fax Group List.
10. After you finish recording, click **Stop**.

11 To listen to the recording, click **Play**
or
to save the recording, click **Save**.

12 Click **Close** and replace your telephone handset.
The window you record from closes and you return to the Group List Properties page.

13 In the **Display Name** box type a display name for the Group List.
The display name can be a maximum of 16 characters.
If you do not type a display name, the ID number of the Group List is displayed.

14 Click **Submit**.
The Group Lists page appears with your new Group List on it.

15 Click the **Members** link for the Group List you created.
The Members List page appears for the Group List.

16 Click **Add**.
The Fax Member Properties page appears.

17 In the **Name** box type the name of the member you want to add to the Fax Group List.
The name can be up to 16 characters long. The name appears on the cover page sent to the recipient. This information is optional. Do not create a name that starts with 1, for example "1Calgary."

18 In the **Phone Number** box type the fax telephone number of the recipient.

19 From the Outdial Method list box select an outdial method.
If you select **Line** or **Pool**, in the **Line/Pool #** box enter the line or pool number.

20 Click **Submit**.
The member appears in the Members List.
Repeat steps 16 through 19 for each member you want to add to the Fax Group List.

**Note:** For more information about Group Lists see the *CallPilot Manager Set Up and Operation Guide*.

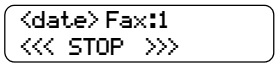
# Sending a Fax Group message

Send a Fax Group message to notify a group by fax of an event or notice that pertains to the group. Before you send a Fax Group message, the fax you want to send must be in your mailbox, and you must have created the Fax Group List. For information about how to create a Fax Group List, see "Creating a Fax Group List" on page 27. Make sure the Group List contains all the fax machines that you want to include.

## To send a Fax Group message - Norstar Voice Mail

**1** Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

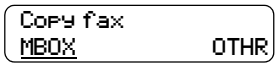
**2** Press PLAY or 2 to play the current message
or
press 6 until you find the fax message you want to forward.



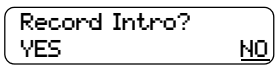

**3** The date received and the Fax ID number appear on the display.



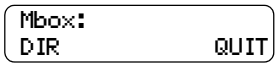

**4** Press COPY or 5.




**5** Press MBOX or 1 to forward the fax message to another mailbox.

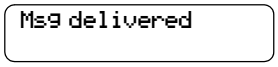



**6** Press NO or 2.
Do not record an introduction because Fax Group List recipients do not hear voice introductions.




**7** Enter the Fax Group List number.

**8** Press SEND or # to send the fax message
or
press OPTS or 3 to assign message delivery options
or
press CC to send the message to another recipient.




**9** This display appears briefly to show that the message is delivered.




**10** Press YES or 1 to send this fax message to another Group List.
To end this session press QUIT or *.

**11** Press [ ] to end this programming session.

## To send a Fax Group message - CallPilot

**1** Press [ ] 9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.

```
End message
RESP    DEL    NEXT
```

**2** Press PLAY or 2 to play the current message
or
press 6 until you find the fax message you want to forward.

```
End message
PRINT   DEL    NEXT
```

**3** Press 7 3 to forward the message.

```
To:
NAME    SPEC   CNCL
```

**4** Enter the Group List number and press OK or #.

```
To:
NAME    SPEC   DONE
```

**5** Press DONE or # when you have entered all the addresses you want to send the message to.

```
Empty
REC
```

**6** If you want to attach a voice message, press REC or 5 and record your message. The message must be longer than three seconds. The system times out after five seconds.
External Group List recipients do not receive voice introductions to fax messages.

```
Msg options
URG    PRIV    OTHR
```

**7** If you want to attach message options, press 7 0 to assign message options.

```
Msg delivered
```

**8** Press 7 9 to send the message.

**9** Press [ ] to end the session.

# Chapter 3
# Setting up Fax On Demand mailboxes

## About Fax On Demand mailboxes

A Fax On Demand mailbox lets external callers retrieve fax messages from CallPilot.

To set up a Fax On Demand mailbox you must

1. From CallPilot Manager, add a Fax On Demand mailbox.
2. From your set, initialize the Fax On Demand mailbox.
   See "Initializing a mailbox" on page 12 for how to initialize a mailbox.
3. From your set, choose the one-call or the two-call method, and the maximum number of faxes that callers can request.
4. From a fax machine telephone add fax messages to the Fax On Demand mailbox.
5. From your set, record a Fax On Demand mailbox greeting that lists the faxes available and tells callers how to retrieve them.

You can add a Fax On Demand mailbox to a CCR Tree. CCR lets callers select options to direct their own calls. For more information about CCR, see the *CallPilot Manager Set Up and Operation Guide*. For how to add a Fax On Demand mailbox to a CCR Tree see "Adding a Fax On Demand mailbox to a CCR Tree" on page 39.

## Adding a Fax On Demand mailbox

### To add a Fax On Demand mailbox

1. Start CallPilot Manager.
2. Click the **Mailbox Administration** heading.
3. Click the **Add Mailbox** link.
   The Add Mailbox page appears.
4. In the **Mailbox** box type the extension number of the Fax On Demand mailbox.
5. From the **Mailbox Type** list box select **Fax On Demand**.
6. Click **Submit**.
   The Fax On Demand Mailbox page appears.
7. In the **Last Name** box type the last name of the Fax On Demand mailbox.
   The name can be a maximum of 16 characters. Do not create a name that starts with 1, for example "1Calgary".
8. From the **Class of Service** list box select a Class of Service.

9 Select the **Display in Directory** check box if you want the Fax On Demand mailbox to be listed in the Company Directory.

10 From the **Outdial Type** list box select **Line**, **Pool** or **Route**.
If you use line or pool, type the line or pool number in the **Line/Pool #** box.
Refer to the *CallPilot Manager Set Up and Operation Guide* for information about preventing unauthorized calls using the outdial feature.

11 In the **Fax Retries** box type the number of delivery attempts to make if you use the two-call method.
The default value is 3. The value can be between 1 and 99. For more information about call method see "Choosing a Fax On Demand call method" on page 36.

12 In the **Fax Interval** box type the number of minutes to wait between delivery attempts.
Make this interval long enough that a typical phone call at the receiving end is unlikely to use all the retries. The value can be between 1 and 60 minutes. The default is 10.

13 Click **Submit**.
The Mailbox List page appears with the Fax On Demand mailbox listed.

14 Click the **Change** link for the Fax On Demand mailbox.

15 If you want to record a spoken name for the mailbox, click **Voice**.
The page you can record from appears.
If you do not want to record a spoken name for the Fax On Demand mailbox, go to step 22.

16 In the **Connect to** box, type the extension number or telephone number you are using to record from.
For a local extension, just type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voice mail system. For example, you might need to dial 9, the area code, and then the telephone number.

17 Click **Dial**.
The telephone rings.

18 Pick up the handset. Do not use Handsfree. Click **Record**. After the tone, record the name of the Fax On Demand mailbox.

19 After you finish recording, click **Stop**.

20 To listen to the recording, click **Play**
or
to save the recording, click **Save**.

21 Click **Close** and replace your telephone handset.
The page you record from closes and you return to the Fax Overflow Mailbox page.

22 Click **Submit**.



**Note:** Before you can use a Fax On Demand mailbox you must initialize it. For information about initializing a mailbox, see "Initializing a mailbox" on page 12.

# Recording a Fax On Demand mailbox greeting

You must record a greeting for each Fax On Demand mailbox. This greeting plays to callers who access the Fax On Demand mailbox. The maximum length of this greeting is designated by the Class of Service.

Before you record the Fax On Demand mailbox Greeting, prepare a greeting for each Fax On Demand mailbox. In your greeting describe the documents available and tell callers how to retrieve them. If you use an alternate language on your system, record the Fax On Demand mailbox Greeting in the alternate language.

An example of a greeting for a one-call method Fax On Demand mailbox is:

*"Hello. You have reached Paddy's Dance Studio fax information hotline. If you are calling from a fax machine telephone, you can receive information on class schedules and prices, registration forms and upcoming special events. To receive class schedules and prices, press* 1. *To receive registration forms, press* 2. *To receive information about upcoming special events, press* 3. *After you have entered the required numbers, press Start on your fax machine."*

An example of a greeting for a two-call method Fax On Demand mailbox is:

"*Hello. You have reached Paddy's Dance Studio fax hotline. You can receive information on class schedules and prices, registration forms and upcoming special events. To receive class schedules and prices, select document 1. To receive registration forms, select document 2. To receive information about upcoming special events, select document 3. Enter the telephone number of the fax machine you wish to have the faxes sent to. If you are calling from outside the 403 area code, include your area code*."

## To record a greeting

**1** Press [Feature] 9 8 1.
Follow the voice prompts or the display button options to open the Fax On Demand mailbox.

**2** If you use the CallPilot interface:

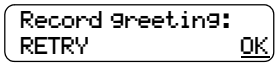
- Press 8 2 to open the Greetings Options menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press ADMIN or 8
- Press GREET or 2
- Go to step 3




**3** Press REC or 1.




**4** Press OK or # to end the recording.




**5** Press OK or # to accept the recording
or
press PLAY or 1 to listen to the greeting
or
press RETRY or 2 to rerecord the greeting.




**6** To record an Alternate Fax On Demand mailbox Greeting, press NEXT or 3 and follow the instructions that appear on the display.

**7** Press [End] to end the session.

# Changing a Fax On Demand mailbox

You can change any property of a Fax On Demand mailbox except the mailbox number. To change a mailbox number, you must delete the mailbox and add a new Fax On Demand mailbox. Refer to "Adding a Fax On Demand mailbox" on page 31.

If you want to change a Fax On Demand mailbox:

| Use | to... | see page |
|---|---|---|
| **CallPilot Manager** | • change the mailbox name<br>• change the Class of Service<br>• change whether the mailbox is displayed in Company Directory<br>• change the spoken name<br>• change the outdial type<br>• change the number of fax delivery retries<br>• change the interval between fax delivery retries | 35 |
| ✆ 9 8 1 | • change the mailbox greeting<br>• change the call method<br>• change how many fax messages callers can request<br>• delete a fax message | 33<br>36<br>36<br>38 |
| **a fax machine telephone** | • add fax messages to the mailbox | 37 |

## To change a Fax On Demand mailbox

1 Start CallPilot Manager.

2 Click the **Mailbox Administration** heading**.**
The Mailbox List page appears.

3 Click the **Change** link for the mailbox you want to change.
The page for the mailbox appears.

4 Modify the properties you want to change.

5 Click**Submit**.

# Choosing a Fax On Demand call method

For each Fax On Demand mailbox you must choose whether the call method is the one-call method or the two-call method.

| | |
|---|---|
| **One-call method** | • the fax message transmits during the original call<br>• the caller must use the telephone at a fax machine to call the Fax On Demand mailbox<br>• the caller pays for any long distance charges that are incurred |
| **Two-call method** | • the caller provides the fax telephone number that the fax is delivered to<br>• the caller can call from any touchtone telephone<br>• the fax can be sent to any fax machine<br>• the fax message transmits in the second call, which is made by CallPilot<br>• the owner pays for any long distance charges that are incurred |

# Setting how many fax messages callers can request

Each Fax On Demand mailbox contains fax messages that a caller can request. You must set how many messages callers can request. Callers can request up to eight fax messages.

## To choose a call method and the number of fax messages

**1** Press [⌂] [9] [8] [1].
Follow the voice prompts or the display options to open the Fax On Demand mailbox.

```
FaxOnDemand
FAXES          ADMIN
```

**2** Press ADMIN or [8].

```
Mailbox admin
GREET   PSWD   QUIT
```

**3** Press [5].

```
Method: Two call
CHNG           NEXT
```

**4** Press CHNG or [1] to choose the one-call method.
In this display, Two represents the current call method. The two-call method is the default call method. If the current call method is correct, press NEXT or [#].

```
Limit: 8
CHNG           OK
```

**5** Press CHNG or [1] and enter the number of faxes a caller can request. The maximum is eight.

```
Limit:
RETRY          OK
```

**6** Press OK or [#].

```
Limit: 7
CHNG           OK
```

**7** Press OK or [#] again to accept the number of faxes a caller can request. In this example, the limit is changed to 7.

**8** Press [☎] to end the programming session.

# Adding a fax message to a Fax On Demand mailbox

You add fax messages to a Fax On Demand mailbox from a fax machine telephone.

If you use the Unified Messaging option, you can use Unified Messaging to add fax messages to a Fax On Demand Mailbox. For information about creating and sending fax messages in Unified Messaging, see the *CallPilot Desktop Messaging Quick Reference Guide* and Mailbox Manager online help.

You must enter a selection identification number when you add a fax message from a fax machine telephone to a Fax On Demand mailbox. The selection identification number is used by callers to select the document they want to retrieve.

Immediately after you add or update a fax message in the Fax On Demand mailbox, verify that the fax message is received and is ready for customer use. To verify the message is ready, access the Fax On Demand mailbox and print the new or updated fax messages.

## To add a fax message to a Fax On Demand mailbox

1. Place the fax in the fax machine.
2. From the system fax machine telephone, call the Voice mail DN.
   If you do not know the Voicemail DN, on a display set press [✆] [9] [8] [5].
3. Log on to the Fax On Demand mailbox:
   - If you use the Norstar Voice Mail interface and the fax machine telephone does not have a mailbox, enter the Fax On Demand mailbox number and password and press [#]
   - If you use the Norstar Voice Mail interface and the fax machine telephone has a mailbox, press [*], enter the Fax On Demand mailbox number and password, and then press [#]
   - If you use the CallPilot interface, enter the Fax On Demand mailbox number and press [#], then enter the Fax On Demand mailbox password, and then press [#]
4. Press [1].
5. Press [1] again to add a fax message.
6. Enter the Fax On Demand selection identification number. The Fax On Demand selection identification number must be a unique number that is a maximum of eight digits. The number cannot start with 0 or 9.
7. Press [#].
8. Press START/SEND on your fax machine when you are prompted to.
   The CallPilot session ends when the transmission is complete.

# Deleting a fax from a Fax On Demand mailbox

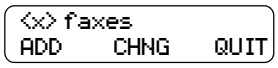
You can change or view a fax selection number using a telephone. If you delete a fax selection number, the fax message associated with the fax selection number is deleted from the Fax On Demand mailbox.

## To delete a fax from a Fax On Demand mailbox

**1** Press [Menu] [9] [8] [1].
Follow the voice prompts or the display button options to open the Fax On Demand mailbox.




**2** Press FAXES or [1].




**3** Press CHNG or [2].




**4** If you want to view the fax selection numbers, press NEXT or [#].
If you know the number of the fax message you want to view enter it now
or
if you want to delete the fax message associated with the fax selection number shown, press DEL or [7].

To update a fax message, you must use a fax machine telephone. For information about loading or updating fax messages, see "Adding a fax message to a Fax On Demand mailbox" on page 37 or "Deleting a fax from a Fax On Demand mailbox" on page 38.




**5** Press [End] to end this programming session.

# Adding a Fax On Demand mailbox to a CCR Tree

To make a Fax On Demand mailbox accessible from a Custom Call Routing (CCR) Tree, add a Mailbox node to a CCR Tree. Assign to the Mailbox node the mailbox number of the Fax On Demand mailbox. This mailbox gives callers single-digit access to a Fax On Demand mailbox.

For more information about CCR Trees, see the *CallPilot Manager Set Up and Operation Guide*.

## To add a Fax On Demand mailbox to a CCR Tree

1. Start CallPilot Manager.
2. Click the **Custom Call Routing** heading.
   The CCR Tree Administration page appears.
3. Click the **Change** link for the Tree you want to add an Information Mailbox to.
   The CCR Tree Properties page appears.
4. Click the **Mailbox** link for the Tree.
   The CCR Tree Properties page appears with the Mailbox node.
5. Click the **Change** link for the Mailbox node.
   The CCR Mailbox Node Properties page appears.
6. In the **Mailbox** box type the mailbox number of the Fax On Demand mailbox.
7. From the Destination list box select where you want callers to go after they access the Fax On Demand mailbox:
   - Previous: returns the caller to the Previous menu
   - Home: returns the caller to the Home node Voice Prompt
   - Disconnect: disconnects the call
8. Click **Submit**.
   The CCR Tree Properties page shows the mailbox is added to the CCR Tree.
9. Click **Close**.

# Chapter 4
# Troubleshooting Fax

Troubleshooting Fax involves solving problems related to Fax options. For more information about CallPilot troubleshooting, see the *CallPilot Manager Set Up and Operation Guide*.

## Problems and solutions

#### A caller cannot retrieve a fax from a Fax On Demand mailbox

If a caller cannot retrieve a fax message from a Fax On Demand mailbox:

- verify that the mailbox is a Fax On Demand mailbox
- verify that fax messages are added to this mailbox
- make sure your greeting tells the caller how to retrieve the fax message, including information about which call method is used
- if you use the two-call method, make sure that you have created a Dialing Translation Table and set the Dialing Translation parameters. For more information on Dialing Translation, see the *CallPilot Manager Set Up and Operation Guide.*

#### A caller cannot leave a fax in a Personal mailbox

If a caller cannot leave a fax message in a mailbox, ensure that the greeting tells the caller that the call must be made from a fax machine.

#### A caller cannot reply or send messages to other mailboxes

A subscriber cannot reply to or send messages to other mailboxes if the subscriber's mailbox is full. This means that too many voice and fax messages are stored in the mailbox and the subscriber must delete old messages. If this problem occurs frequently, assign the mailbox a different Class of Service with more mailbox space.

CallPilot mailboxes are equipped with the Never Full Mailbox Feature, which allows external callers to leave voice and fax messages in a mailbox, even if the mailbox is full. The message is stored but cannot be accessed until the mailbox owner deletes at least one saved message. The Never Full Mailbox Feature is available only to external callers. Internal callers cannot leave messages if a mailbox is full.

#### Faxes sent when the fax machine is busy are lost

If fax messages sent when the fax machine is busy are not being received:

- verify that a default fax extension is set up
- verify that a Fax Overflow mailbox is added to CallPilot
- verify that the extension defined in the Fax Overflow mailbox is the extension number of the fax machine

- make sure that the fax machine is connected to the system through an Analog Telephone port

### Faxes cannot be sent to the fax machine

If this occurs on a local fax machine:

- verify that the fax machine is ready to receive and is not jammed or out of paper
- verify that the fax machine is connected to the system through an Analog Telephone port
- increase the number of retries assigned to the Fax Overflow mailbox for the fax machine. To change the number of retries, see "Changing a Fax Overflow mailbox" on page 26.

If this occurs on a remote fax machine:

- verify that you entered the correct fax number
- verify that there are no dialing restrictions applied to the subscriber's extension

### Faxes cannot be sent from the Fax Overflow mailbox

If a message is left in the General Delivery Mailbox that says "*The attached fax message could not be printed to <fax machine extension>*" the Fax Overflow mailbox has reached its maximum number of retries and the fax message was not sent.

If this occurs:

- verify that the fax machine works
- verify that the fax machine is connected to the system through an Analog Telephone port
- increase the maximum number of retries assigned to the Fax Overflow mailbox. To change the number of retries, see "Changing a Fax Overflow mailbox" on page 26.

### Fax messages are left in the General Delivery mailbox

If the Fax Overflow mailbox retry limit is reached for a fax message, the message is automatically sent to the General Delivery Mailbox. To correct this problem:

- verify that the fax machine is working
- verify that the fax machine is connected to the system through an Analog Telephone port
- open the General Delivery Mailbox and forward the fax messages to another fax machine. Be sure to check the General Delivery mailbox on a regular basis.
- you can set up Off-premise Message Notification to notify you when a message is received in the General Delivery Mailbox. For more information about Off-premise Message Notification and the General Delivery Mailbox, see the *CallPilot Manager Set Up and Operation Guide.*

# Chapter 5
# Fax configuration tips

## Using CallPilot Fax for a small business

The following examples describe how a small business called Paddy's Dance Studio uses Fax. This business uses CallPilot Fax to tell callers about upcoming events and let students register.

### A Fax On Demand mailbox setup

Paddy's Dance Studio uses a Fax On Demand mailbox to inform students of upcoming events. The Fax On Demand mailbox contains three fax messages that are updated every month. The first fax message is a schedule for regular and drop-in classes. The second fax message lists the current prices for each class. The third fax message is a schedule for the upcoming special events. Each of the fax messages is sent using the one-call method. This means that the caller pays for any charges incurred.

Since the Fax On Demand mailbox contains three fax messages, the greeting for the Fax On Demand mailbox tells callers how to get the information they want. For example:

*"Hello. You have reached Paddy's Dance Studio fax information mailbox. If you are calling from a fax machine telephone, you can receive information on class schedules, prices, and upcoming special events. To retrieve class schedules, select document 1. To get a detailed price list, select document 2. To get information about upcoming special events, select document 3*."

### Using Fax Mail to receive faxes

The registrar of Paddy's Dance Studio uses a subscriber mailbox to receive registration fax messages from students. These fax messages are sent to a subscriber mailbox and not the fax machine because the registration forms contain personal information such as addresses and telephone numbers. The registration faxes are collected in the subscriber mailbox and sent to the fax machine when the registrar is available to pick them up.

The greeting on the registrar's mailbox tells callers how to send a fax message. For example:

*"Hello. You have reached Paddy's Dance Studio registration desk. To speak to the receptionist, press* 0. *To leave a message for the registrar, leave your name, telephone number and message after the tone. If you are calling from a fax machine telephone, you can register for a class by fax. On your registration fax form, include your name, telephone number, address and the name of the class you are registering for. Also remember that payment is due before the start of the first class. To register now by fax, press the Start button on your fax machine."*

### A Fax Overflow mailbox setup

Paddy's Dance Studio has only one fax machine and it can get very busy. To prevent losing any fax messages due to a busy fax machine, a Fax Overflow mailbox is added to CallPilot. This mailbox collects any incoming fax messages that arrive while the fax machine is busy.

# Fax tips

Use these tips to maximize your Fax efficiency.

### You can print a fax from a Fax Overflow mailbox at another fax machine

If a fax machine for a Fax Overflow mailbox is out of order for an extended time, you can print the stored fax messages on another fax machine connected to the system. To print the fax messages, change the extension number of the Fax Overflow mailbox to the extension of a working fax machine. After you print the stored fax messages, change the extension number back to that of the original fax machine so you do not miss any incoming fax messages.

For information about setting the extension number of a Fax Overflow mailbox, see "Changing a Fax Overflow mailbox" on page 26.

### You can increase subscriber mailbox storage space for fax messages

Subscriber mailboxes store fax messages and voice messages in the same message space. The amount of space available is determined by the mailbox Class of Service. If a subscriber expects several fax messages, you can change the mailbox Class of Service to allow more message space.

### You can use Off-premise Message Notification to notify you of fax machine problems

If a fax message goes to the Fax Overflow mailbox and the retry limit is reached, the message is sent to the General Delivery mailbox. You can open the General Delivery mailbox and forward the fax messages to another fax machine connected to the system. Check the General Delivery mailbox on a regular basis. Off-premise Message Notification can be set up to notify you when a message is received in the General Delivery mailbox. For more information about setting up Off-premise Message Notification and the General Delivery mailbox, see the *CallPilot Manager Set Up and Operation Guide*.

### You can transfer a fax call to your mailbox

If you answer a call from a caller who is leaving a fax message in your mailbox, you can transfer the call to your mailbox. When you answer the call, tell the caller that you will transfer them to your mailbox. Enter [✆] [9] [8] [6] and enter your mailbox number. The caller hears your mailbox greeting and can leave a fax message. Tell the caller to press the Start button on their fax machine.

If you answer your telephone and hear a fax tone, you can transfer the call to your mailbox by entering [✆] [9] [8] [6] and entering your mailbox number. The fax message is left in your mailbox.

# Appendix A
## Fax programming record

This section provides record sheets for Fax programming. You can photocopy these pages for multiple use.

## Pre-installation checklist

| | |
|---|---|
| **Extension number/mailbox number length** | |
| **Installer name** | |
| **Installation date** | |
| **Model of office fax machines** | |
| **Extension or telephone number of office fax machines** | |

## Fax Overflow mailboxes

| | |
|---|---|
| **Mailbox number** | |
| **Fax machine extension number** | |
| **Mailbox name** | |
| **Spoken name** | |
| **Fax retries (1-99)** | |
| **Fax interval (1-60 min.)** | |
| **Mailbox number** | |
| **Fax machine extension number** | |
| **Mailbox name** | |
| **Spoken name** | |
| **Fax retries (1-99)** | |
| **Fax interval (1-60 min.)** | |
| **Mailbox number** | |
| **Fax machine extension number** | |
| **Mailbox name** | |
| **Spoken name** | |
| **Fax retries (1-99)** | |
| **Fax interval (1-60 min.)** | |
| **Mailbox number** | |
| **Fax machine extension number** | |
| **Mailbox name** | |
| **Spoken name** | |
| **Fax retries (1-99)** | |
| **Fax interval (1-60 min.)** | |
| **Mailbox number** | |
| **Fax machine extension number** | |
| **Mailbox name** | |
| **Spoken name** | |
| **Fax retries (1-99)** | |
| **Fax interval (1-60 min.)** | |

## Fax On Demand mailboxes

| | |
|---|---|
| **Mailbox number** | |
| **Mailbox name** | |
| **Class of Service** | |
| **Display in Directory** | Y N |
| **Spoken name** | |
| **Outdial type** | Line/Pool # |
| **Fax retries** | |
| **Fax interval** | |
| Delivery method | One-call Two-call |
| Maximum number of faxes* | 1 2 3 4 5 6 7 8 |
| **Mailbox number** | |
| **Mailbox name** | |
| **Class of Service** | |
| **Display in Directory** | Y N |
| **Spoken name** | |
| **Outdial type** | Line/Pool # |
| **Fax retries** | |
| **Fax interval** | |
| Delivery method | One-call Two-call |
| Maximum number of faxes* | 1 2 3 4 5 6 7 8 |
| **Mailbox number** | |
| **Mailbox name** | |
| **Class of Service** | |
| **Display in Directory** | Y N |
| **Spoken name** | |
| **Outdial type** | Line/Pool # |
| **Fax retries** | |
| **Fax interval** | |
| Delivery method | One-call Two-call |
| Maximum number of faxes* | 1 2 3 4 5 6 7 8 |

* A caller can request a maximum of 8 faxes. A mailbox can store as many faxes as space permits.

## Fax Group Lists

| | |
|---|---|
| Group List leading digit* (901 - 999) | |
| Spoken name | |
| Display name (1 - 16 characters) | |

**Group List members**

| Name | Fax machine telephone number (1 - 30 digits) | Route |
|---|---|---|
| | | |
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*The Group List leading digit can be changed from the default of 9 during system initialization.

# Glossary

**Analog Telephone port**

An Analog Telephone port can be an analog port on the BCM50 main cabinet, an ASM in the expansion cabinet or an ATA attached to a digital port.

**ATA**

An Analog Terminal Adapter is a product, such as the Nortel ATA2, that connects an analog device such as a single-line telephone or a fax machine to your system.

**ASM**

An Analog Station Module connects up to eight analog devices, such as single-line telephones or fax machines to your system.

**Auto Attendant**

The CallPilot answering service that answers incoming calls with a Company Greeting, plays a list of options to a caller, and performs call routing functions in response to caller selections.

**Call method**

How a fax message from a Fax On Demand mailbox is sent to a caller. There are two call methods: one-call and two-call. In the one-call method, the fax message is sent to the caller in the original call. In the two-call method, the fax message is sent in a second call from CallPilot to the number that is specified by the caller.

**Class of Service**

A Class of Service (COS) defines the values for the special features of a mailbox. When you add a mailbox you choose a Class of Service that provides the level of service appropriate for the subscriber. A mailbox cannot be added without a Class of Service.

**Company Directory**

An internal list of the names of subscribers with initialized mailboxes designated to appear in the directory.

**Custom Call Routing (CCR) Tree**

Call paths that give callers options to direct their own calls.

**Defaults**

The parameters preset for CallPilot.

**Dialing Translation**

A CallPilot feature that converts digits to be dialed into acceptable call routing information. Dialing Translation is required to use the two-call method with Fax On Demand mailboxes.

**Display**

A one- or two-line screen on a display telephone that shows CallPilot commands and options.

**Display buttons**

The three buttons that appear below a two line display. Callers can press these buttons to select specific CallPilot options.

**Display options**

The choices that appear on a two-line display. Callers can press dialpad buttons to select specific options.

**Extension**

A number used to reach a designated telephone. The extension length can be between two to seven digits.

**Fax Mail**

Fax Mail lets a caller leave a fax message in a Personal mailbox. The fax messages can later be retrieved by the mailbox owner and printed on a fax machine.

**Fax On Demand mailbox**

A Fax On Demand mailbox is a CallPilot mailbox that lets a caller retrieve fax messages stored in CallPilot.

**Fax Overflow mailbox**

The Fax Overflow mailbox is a CallPilot mailbox for a fax machine. If the fax machine cannot answer an incoming fax call, CallPilot answers the call and stores the fax message in the Fax Overflow mailbox. Later, when the fax machine is ready to print, CallPilot sends the stored fax message to the fax machine.

**Fax telephone**

A fax machine that can be used to make voice telephone calls.

**General Delivery Mailbox**

One of the two Special Mailboxes that hold messages for individuals who are not assigned a Subscriber mailbox. The other Special Mailbox is the System Administrator Mailbox.

**Greetings**

Fax On Demand mailbox greetings can be recorded in Primary and Alternate Languages. These greetings provide a list or a description of the faxes available from the Fax On Demand mailbox.

**Home node**

The Home node is the first node a caller goes to on a CCR Tree.

**Initializing a mailbox**

Preparing a mailbox to receive messages. This includes changing a mailbox default password and recording a Company Directory name.

**Mailbox**

A storage place for messages on the CallPilot system.

**Mailbox number length**

The number of digits allowed in a mailbox number. The mailbox number length ranges from two to seven digits.

**Mailbox properties**

Optional parameters in addition to the Class of Service values. Mailbox properties are: Include in Company Directory, Alternate extensions, Express Messaging Line, Call Screening, Message Waiting Notification, and Outdial route.

**Off-premise Message Notification**

A CallPilot feature you can program to call you at a telephone number, extension, or pager to let you know that you have a voice or fax message.

**Option**

1. A CallPilot choice given to a subscriber through voice or display prompts.
2. An optional CallPilot feature that you enable with a keycode.

**Password**

A four- to eight-digit number entered using the dialpad. You must enter a password to open a mailbox or perform configuration tasks.

**Node**

An option along the call Path of a CCR Tree. A node can be a menu, the Home Menu, an Information Message, a mailbox or an extension. You can set up a Mailbox node as a Fax On Demand mailbox.

**Reports**

CallPilot Reports let you view information such as CallPilot programming, amount of available message storage time and CCR programming and administration.

**Subscriber**

A mailbox owner.

**System Administrator**

The person responsible for configuring, updating, and maintaining the CallPilot system.

**Voice prompts**

The prerecorded voice instructions that play to callers when they access CallPilot features and options. Voice prompts also guide callers along the call paths of CCR Trees.

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