

InterCall Online User Guide

Scheduling Direct EventSM Meetings



For more information:
877.333.2666
www.intercall.ca

By using InterCall Online, you can reserve conferences on the web rather than calling our reservations team. This tool interacts directly with our conferencing provisioning system to register your call preferences and to schedule operator resources for your conference calls when needed.




After logging in, you will be taken to your individual Home page. Your Home page is where you'll find a summary of all the available features and tools that are set up in your owner profile. If it is selected by your company, this page may include your company's own branding, as well as special announcements regarding new services and features.

Scheduling a Meeting

You can schedule a meeting directly from your Home page or by selecting **My Meetings**.

The screenshot shows the InterCall Online user interface. On the left is a navigation menu with links: Home, My Meetings (circled in red), My Library, Manage Your Account, Reports, View Invoices, and Customer Support. The main content area has a 'Welcome to InterCall Online' message with a user profile picture. Below this is a 'Join A Meeting As A Participant' section with a text input field for a conference code and a 'Join' button. The 'Today's Upcoming Meetings' section features a 'Schedule A Meeting' button (circled in red) and a 'Start Instant Meeting' dropdown menu. Below these sections is a table with columns: R, Date/Time, Topic, Leader Name, Owner, Conf ID, Meeting N..., and Duration.

- 1 Click **Schedule A Meeting** from either location. Click **Direct Event** in the Audio Options section. Then click **Next**.
- 2 Complete the **Meeting Information** section.

Direct Event	Meeting Information
<p>Required</p> <ul style="list-style-type: none"> ▶ Meeting Information <p>Optional</p> <ul style="list-style-type: none"> Participant List Pre-Meeting Features Enhanced Features Recording Features Web/Video Features 	<p>MEETING DETAILS</p> <p>To add additional conference numbers, please call 800-374-2441</p> <p>* - Required Fields</p> <p>* Please select from the following Conference Numbers for this reservations</p> <ul style="list-style-type: none"> <input type="checkbox"/> Direct Event Toll Free Dial-In Number-Participant : (888) 607-5837 <input type="checkbox"/> Direct Event Toll Free Dial-In Number-Leader : (888) 607-5840 <input type="checkbox"/> Direct Event Toll Free Dial-In Number-Participant : (888) 235-4141 <input type="checkbox"/> Direct Event International Dial-In Number-Participant : (706) 758-2262 <p>* Date: <input type="text"/> </p> <p>* Time: <input type="text"/></p> <p>* Time Zone: (GMT-05:00) Eastern Time (US & Canada)</p> <p>* Duration: <input type="text"/> Hours <input type="text"/> Minutes </p> <p>End Time: N/A</p> <p>* Participants: <input type="text"/> </p> <p>* Topic: <input type="text"/></p> <p>PAC CODE</p> <p>PAC Code: <input type="text" value="Marketing"/></p> <p>SCHEDULER/ CALL ORGANIZER</p>

- Select the **Dial-in Numbers** for the leader and participants.
 - Select the **Date** for your meeting by clicking the calendar icon.
 - Select a **Time** for your meeting.
 - Select the **Time Zone** for your meeting from the drop down menu. The time zone will default to what is saved on your owner profile.
 - Specify the **Duration** of your meeting in hours and minutes.
 - Specify the **Number of Participants** for your meeting.
 - Include a **Topic** for the conference to distinguish this meeting from others.
- 3 Provide a **PAC Code** if needed. PAC Codes, or Project Accounting Codes, provide a method to identify conference calls. These PAC Codes are individual accounting codes that may be used to bill the appropriate department/cost center or just to track departmental conference calls. The label preceding this field can be customized to show the verbiage that your company uses for this purpose.
 - 4 If you are the scheduler/call organizer for this meeting, simply choose **Same as Owner** and provide any additional required information that does not pre-populate.

If you are scheduling this call on the behalf of someone else, provide your information in this area so a conference coordinator has a point of contact should there be any questions.

- If you are the leader for this meeting, simply choose **Same as Owner's address** and provide any additional required information that does not pre-populate.

If you are not the meeting leader, provide the required information in this area.

- Select the **Standard Features** for the call. You have the option to join before participants enter your meeting (Leader First) or after all participants have been placed into the meeting (Leader Last) or select None.
- If not already pre-populated, provide an email address for email confirmation details for your meeting. If you want the email confirmation sent to multiple email addresses, enter them in the email field separated by a comma. You may also choose an optional fax confirmation or dial-out confirmation.
- If you want to make any optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** here or from any of the optional feature tabs to reserve your call.

Optional Meeting Features

There are many optional meeting features that can also be chosen using InterCall Online. These features include Participant Lists, Pre-Meeting Features, Enhanced Features and Recording Features.

PARTICIPANT LIST

Participant List is a commonly used security feature that ensures only invited participants are allowed into the conference by the conference operator. You can choose to have the conference operator dial out to the participant or indicate that the participant will be dialing into the call. This feature can also be used to communicate the meeting details to participants.

Participant List

i You can create a list of participants to attend your meeting. Select a stores list or add new contacts below.

IDENTIFY PARTICIPANT LIST

View participant in the distribution list: Monday

Select Name	Telephone	Email
Brad Pitt		
M Marples	01452 581000	testdoc@intercall.com
P G Tipps		

Add Selected Participants to Meeting

Confirm Participant List

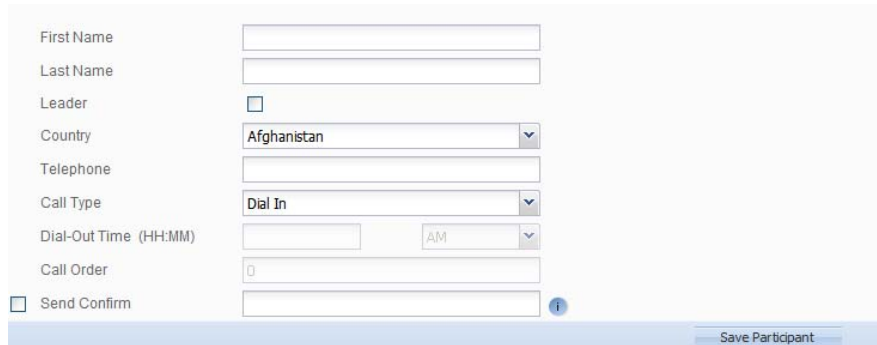
Approved Participant List - Check the box to **ONLY** allow entry for the participants listed above.

Add Participant

First Name	Last Name	Leader	Telephone	Country	Send Confirm	Call Type	Dial-Out Time	Call Order
Alison	Templeton	<input checked="" type="checkbox"/>	01452581004	United Kingd...		Dial In		0

- Set the parameters for your Participant List.

- In the Identify Participant List section, select participants from a stored list (set up within the My Library/My Address Book) by highlighting their names and clicking **Add Selected Participants to Meeting**. Your screen will refresh with this addition.
- To add new participants to a list, click on Add Participant and scroll down the page and complete the table with their details and click **Save Participant**.



The screen will refresh to show a list of participants for your call. Repeat as necessary to add more participants.

- 2 If you want to make any additional optional meeting feature selections, click **Next**. Otherwise, you may click **Submit** to reserve your call.

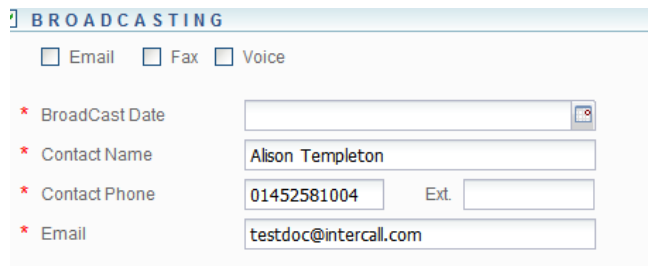
PRE-MEETING FEATURES

The online conferencing tool also offers a set of pre-meeting features that give you additional flexibility in how to communicate to participants in advance of a conference. These include email, fax and voice broadcast services, customized enunciator and operator scripts and promotional playback messages.

Additional charges apply to many of these features. Please check with your company administrator or account manager for details.

Broadcast Services

Send pre- or post-event documents or messages to all your guests simultaneously.



- 1 Check the box indicating you would like to add **Broadcasting** to your meeting.
- 2 Select one or more of the delivery methods to send documents or messages:
 - **Email** – Supports text and HTML files.



- **Fax** – Supports paper copy or electronic files (MS Word or Adobe file formats).
 - **Voice** – Supports audio messages up to 45 seconds in duration.
- 3 Click the calendar icon to select your Broadcast Date.
 - 4 Provide or edit **Contact Name**, **Contact Phone** and **Email**. (These will automatically pre-populate with your details but are editable.)
 - 5 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Voice Broadcast services are free; however, additional charges may be applied for Email and Fax Broadcast services. Please check with your company administrator for details.

Special Enunciator

You may have your participants greeted with a branded recording when they dial in for your conference call. For example, "Welcome to the designated conferencing provider for ABC Company. A conference coordinator will be with you shortly."

- 1 Check the box indicating you would like to add a **Special Enunciator** to your meeting.
- 2 Provide your script where indicated.
- 3 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Custom Scripting

Craft a special message for a welcome statement, Q&A session and/or closing comments. Your script is read by the operator during your meeting, adding another way to personalize your call.

- 1 Check the box indicating you would like to add **Special Script** to your meeting.
- 2 Provide your special script where indicated.
- 3 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Promotional Playback

Provide a promotional message or announcement for your participants to listen to while they wait for your meeting to begin.

- 1 Check the box indicating you would like to add **Promotional Tape/Playback** to your meeting.
- 2 From the drop down menu, select the format for which the message or announcement will be provided: CD, cassette, EncoreSM, micro cassette or DAT.
- 3 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

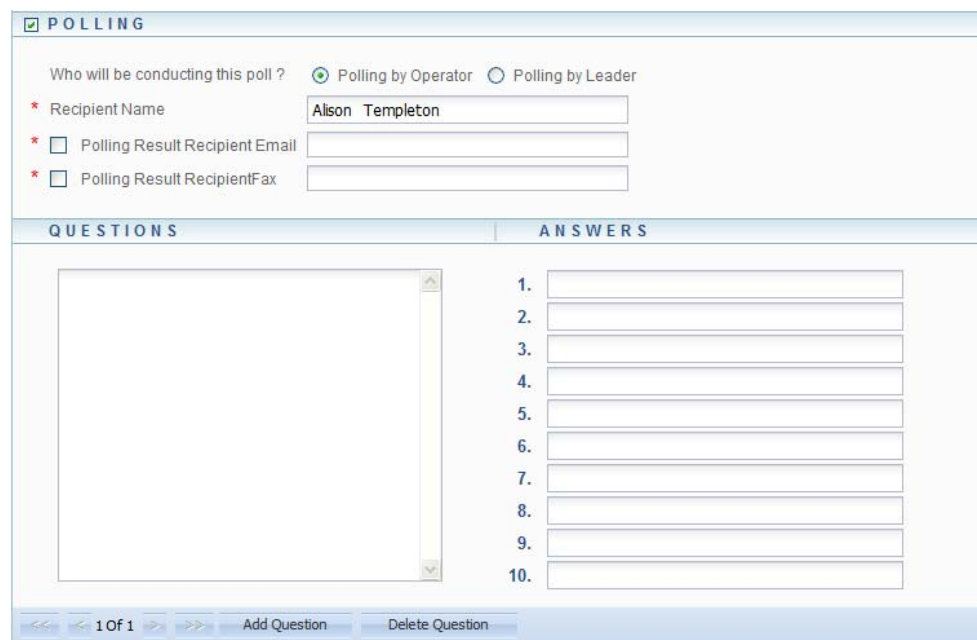
ENHANCED FEATURES

A complete range of enhancements are available to make the most of your event, and your conference will be more professional, interactive and engaging. It's easy to customize your conference with one or more of the enhanced features listed below.

Additional charges apply to many of these features. Please check with your company administrator or account manager for details.

Polling

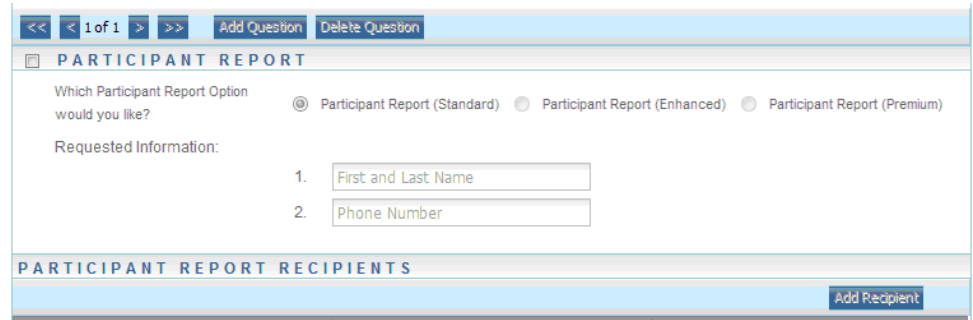
Determine questions prior to your meeting and have participants respond using their telephone keypads. Polling allows you to collect instant feedback and increases participant involvement in the call. You will receive a report with all the responses organized by question and participant.



- 1 Check the box indicating you would like to add **Polling** to your meeting.
- 2 Determine who will conduct the poll.
- 3 Identify who will receive Polling results and provide **Recipient Name, Email** and/or **Fax** number.
- 4 In the specified areas, provide your question and up to 10 possible answers. Click **Add Question**. The screen will refresh, and you may add more questions or delete any you have already submitted.
- 5 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Participant Report

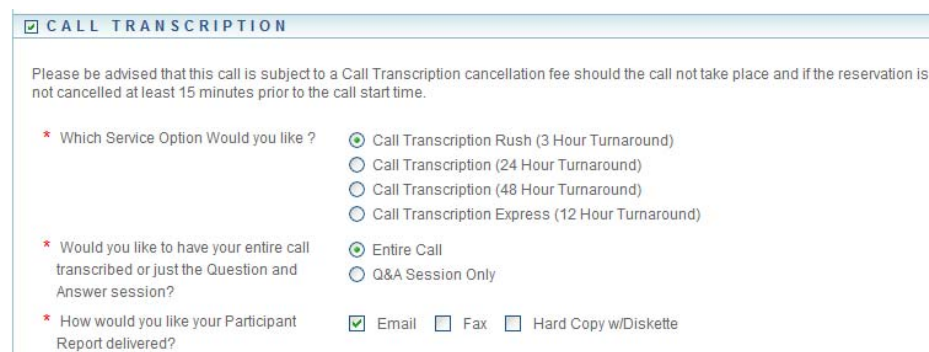
Collect information about your participants as they join your conference. The information will be sent to you by fax or email along with the on-the-line times for each participant.



- 1 Check the box indicating you would like to add **Participant Report** to your meeting.
- 2 Select which **Participant Report Option** you would like:
 - **Standard** – Requests the participant's first and last name.
 - **Enhanced** – Requests the participant's first and last name, phone number and two additional pieces of information of your choice. If selected, add the additional requested information you desire to fields 3 and 4.
 - **Premium** – Requests the participant's first and last name, phone number and four additional pieces of information of your choice. If selected, add the additional requested information you desire to fields 3 through 6.
- 3 Indicate who you would like the Participant Report delivered to and provide **Recipient Name, Email** and/or **Fax** number. Click **Add Recipient**. Your screen will refresh and you may add more recipients if desired.
- 4 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Call Transcription

Transcription provides an accurate, verbatim account of a conference in a typewritten format in Microsoft Word.

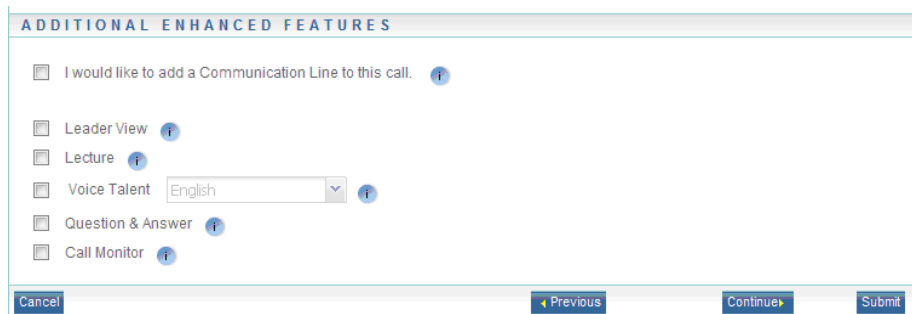


- 1 Check the box indicating you would like to add **Call Transcription** to your meeting.
- 2 Select your preferred **Service Option**: 3, 12, 24 or 48 hour turnaround.

- 3 Determine whether you would like your **Entire Call** transcribed or the **Q&A Session Only**.
- 4 Select how you would like your transcription delivered: **Email**, **Fax** or **Hard Copy w/Diskette**.
- 5 Provide the requested contact information. Click **Add Recipient**. Your screen will refresh and if you choose to do so, you may add more recipients or delete recipients you've already submitted.
- 6 If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

Additional Enhanced Features

Choose from the following Additional Enhanced Features to make your meeting experience even more productive.



- + **Communication Line** – Speak with an operator outside the main conference to convey behind-the-scenes information, orchestrate guest speakers or give timing cues. A Communication Line makes it easier to manage a large conference.
- + **Leader-ViewSM** – View participant information and Q&A queue lists via the Internet. With this secure, real-time tool, you'll be able to see when key guests arrive and who's in queue to ask questions.
- + **Lecture Mode** – All guests' lines are muted during the presentation to reduce background noise, allowing you to deliver your message uninterrupted.
- + **Voice Talent** – Use screened and trained operators to provide voice-over quality talent, lending a professional touch to high-profile conferences. English and Spanish speaking operators are available.
- + **Question & Answer** – Give your participants the opportunity to ask questions during the conference. Participants indicate they have a question using their telephone keypads, while the operator manages the question queue in a professional and orderly fashion.
- + **Call Monitor** – Have your conference call monitored for clarity, but not content, ensuring that your participants will experience the highest level of quality.

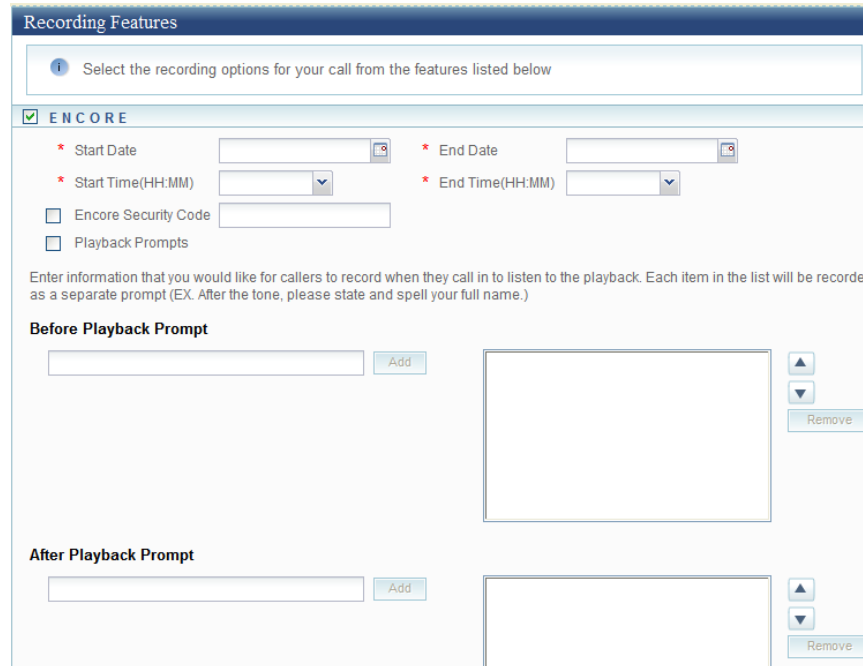
If you want to make any additional optional meeting feature selections, click **Continue**. Otherwise, you may click **Submit** to reserve your call.

RECORDING FEATURES

Record your conference call for participants who were unable to attend your meeting or those who would like to listen again. Additional charges apply to many of these features. Please check with your company administrator or account manager for details.

Encore

Encore digitally records your call for those who were unable to attend it live or would like to listen again. Accessible by dialing a toll-free number for easy 24/7 access, Encore is convenient and time saving.



The screenshot shows a web interface titled "Recording Features". At the top, there is a blue header bar. Below it, a light blue box contains an information icon and the text "Select the recording options for your call from the features listed below". The main content area is titled "ENCORE" with a checked checkbox. It contains several input fields: "Start Date" and "End Date" with calendar icons, "Start Time(HH:MM)" and "End Time(HH:MM)" with dropdown menus, "Encore Security Code" with a checkbox and an input field, and "Playback Prompts" with a checkbox. Below these fields, there is a text instruction: "Enter information that you would like for callers to record when they call in to listen to the playback. Each item in the list will be recorded as a separate prompt (EX. After the tone, please state and spell your full name.)". There are two sections for prompts: "Before Playback Prompt" and "After Playback Prompt". Each section has a text input field with an "Add" button and a larger text area with "Move Up", "Move Down", and "Remove" buttons.

- 1 Check the box indicating you would like to add **Encore** to your meeting.
- 2 Click on the calendar icons to select a **Start Date** and an **End Date** for your Encore digital recording to be available.
- 3 Provide a **Start Time** and **End Time** for your Encore digital recording to be available.
- 4 If desired, select the **Security Password** option and provide the password you would like in the specified area.
- 5 If you have **Before Playback Prompt** information you would like to capture about your caller, type it into the relevant box on the screen and click **Add**. Prompts might include "Please state and spell your full name," or "Please provide your email address." Your screen will refresh with each prompt you add and be displayed in the larger box in the middle of the screen. At this point, you can change the order of the prompts by highlighting a prompt and clicking **Move Up** or **Move Down**. You may also highlight a prompt and click **Remove** if you no longer want the prompt to be included.
- 6 **After Playback Prompt** functionality is the same as Before Playback Prompt.

Tape Recording

Have your conference call recorded and sent to you in one of our multiple CD options or on cassette.

T A P E R E C O R D I N G							
Recording Type	Mail Qty	Media Shippin...	Ship To	Country	Address 1	Address 2	City
CD - CDA	0	Domestic - St...	Alison Temple...	United Kingdom	Topeka House	Luther Challis Busi...	Barnwood, Glo...

* Recording Type		CD - CDA
* Mail Qty		0
* Media Shipping Method		Domestic - Standard
* Ship To		Alison Templeton
* Address 1		Topeka House
* Address 2		Luther Challis Business Centre
* Country		United Kingdom
* City		Barnwood, Gloucester
* State/Province		
* ZIP/Postal Code		GL4 3HB

- 1 Check the box indicating you would like to order a copy of your Encore recording.
- 2 Select your **Recording Type** from: CD-Indexed, CD-MP3, CD-WAV, CD-CDA or Cassette.
- 3 Designate the **Quantity** for recordings you would like to receive.
- 4 Select your **Media Shipping Method** from Domestic Standard, Domestic Overnight, International Standard or International Overnight.
- 5 Provide the **Ship To** recipient, **Address**, **City**, **State/Province**, **ZIP/Postal Code** and **Country** for whom the Encore recordings are to be delivered. Click **Add Recipient**. Your screen will refresh and you may designate additional recipients or delete recipients who have already been submitted.
- 6 If you want to make any additional optional meeting feature selections, click **Previous**. Otherwise, you may click **Submit** to reserve your call.
- 7 A confirmation message will appear on your screen stating your call has been scheduled along with your conference ID. From here you will have the ability to download your conference directly into your calendar by selecting one of the calendar options shown.

VIEW REGISTERED PARTICIPANTS

By using InterCall Online, you can see who has registered for your Direct Event call.

- 1 Log into InterCall Online using your username and password.

- 2 Select **My Meetings** from the left-hand navigation bar.
- 3 Locate your Direct Event scheduled call from the list of meetings on the page. Use the **Search** options to search by conference ID, type of call (i.e. Direct Event) or by conference date.
- 4 Highlight the conference on the screen and click the **Edit** button located at the bottom of the screen.
- 5 The **Meeting Information** page will open on the screen allowing you to review the details of the call.
- 6 Click on **Participant List** in the left-hand navigation bar.
- 7 A new window will open called **Direct Event Registration**. Click on the **Conference ID** number and then either open the participant list on screen or save the details as an Excel document to your desktop. The list will show information on participants who have registered for your call at that time.
- 8 Close the window to return to InterCall Online.

