

InterCall Online User Guide

Sign Up Now



For more information:
877.333.2666
www.intercall.ca

InterCall Online offers an easy way for new users within your company to sign up for a conferencing account by using one of the available options listed below.

- + Sign up for a new conferencing account.
- + Sign up for a new conferencing account with credit card billing.

This user guide assumes you already have administrator rights to manage your organization's InterCall conferencing account via InterCall Online. Please contact your sales representative for additional information and to request administrator rights.

Option 1: Sign Up for a New Conferencing Account

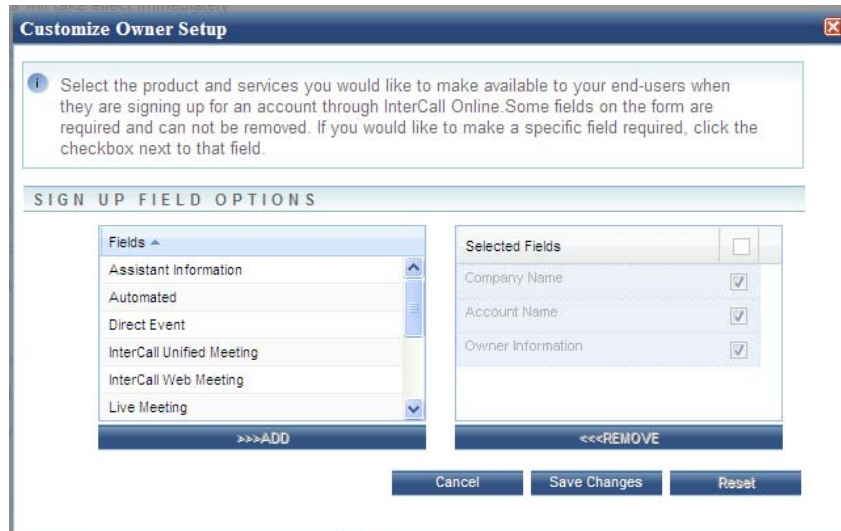
ADMINISTRATOR INSTRUCTIONS

- 1 Go to www-ca.intercallonline.com.
- 2 Select **Manage My Account**.
- 3 Click **View/Edit Account Information**.
- 4 On the account profile screen, scroll down to the **Owner Sign Up Settings** box.

OWNER SIGN UP SETTINGS	
Owner Setup:	Enabled
Portal username:	Testing
Password:
Confirm Password:
Owner Setup Type:	Manual
Customize Owner Setup ⓘ	

- 5 Choose **Enabled** in the **Owner Setup** drop-down menu.
- 6 Create an account username and password. These follow the same conventions as creating an InterCall Online username and password (see the InterCall Online Getting Started guide for details).
- 7 You have the option to allow automatic approval of owner sign up requests or to manually approve them through the Approve New Owner Requests in the Manage My Account section. Select your preferred option in the **Owner Setup Type** box.
- 8 You can customize the layout of the form by clicking **Customize Owner Setup**. From the left-hand box, select the fields you would like displayed on the Owner

Setup Form. Click **Add** to move them to the right-hand side of the screen. If you want to make a field required (i.e., the PAC code field), click the checkbox next to that field. Some fields are always required and cannot be changed (grayed out on the screen). When you have finished, click **Save Changes** to return to the **View/Edit Account Information** screen.



Customize Owner Setup

Select the product and services you would like to make available to your end-users when they are signing up for an account through InterCall Online. Some fields on the form are required and can not be removed. If you would like to make a specific field required, click the checkbox next to that field.

SIGN UP FIELD OPTIONS

Fields	Selected Fields
Assistant Information	Company Name <input checked="" type="checkbox"/>
Automated	Account Name <input checked="" type="checkbox"/>
Direct Event	Owner Information <input checked="" type="checkbox"/>
InterCall Unified Meeting	
InterCall Web Meeting	
Live Meeting	

>>>ADD <<<REMOVE

Cancel Save Changes Reset

- 9 Click **Save Changes**.
- 10 Validate the information is correct and click **Continue** to save.
- 11 Provide the account username and password information to users within your organization who require a new conferencing profile along with the URL for the site, www-ca.intercallonline.com.
- 12 If you selected to manually approve new owner requests, these are accessible on the **Approve New Owner Requests** page under **Manage My Account**. You can either approve the request without viewing the owner profile or you can review their details before approving.



> Manage My Account > Approve New Owner Requests

Please approve or reject new owner requests below. You may select multiple items. To view details of a request, click on the Owner Name link.

Approve New Owner Requests

Owner Name	Tracking Id	Requested Date
AlisonT TestUser	164	11/10/2008

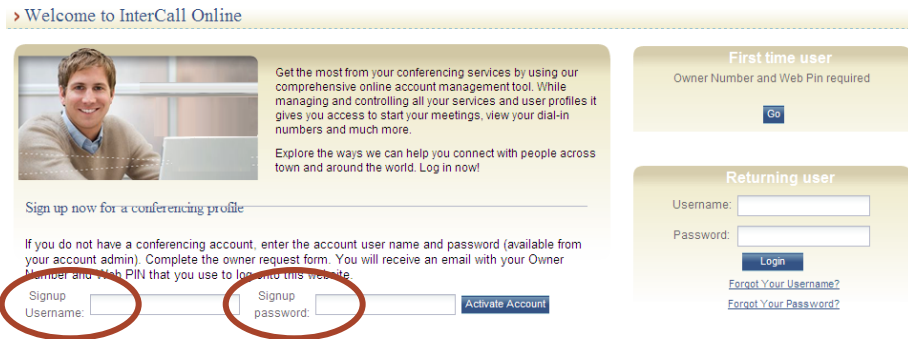
Approve Checked Owners Reject Checked Owners

- 13 If you choose to view their details, select the owner name. After review, click **Approve this Owner's Request** or **Reject this Owner's Request**.

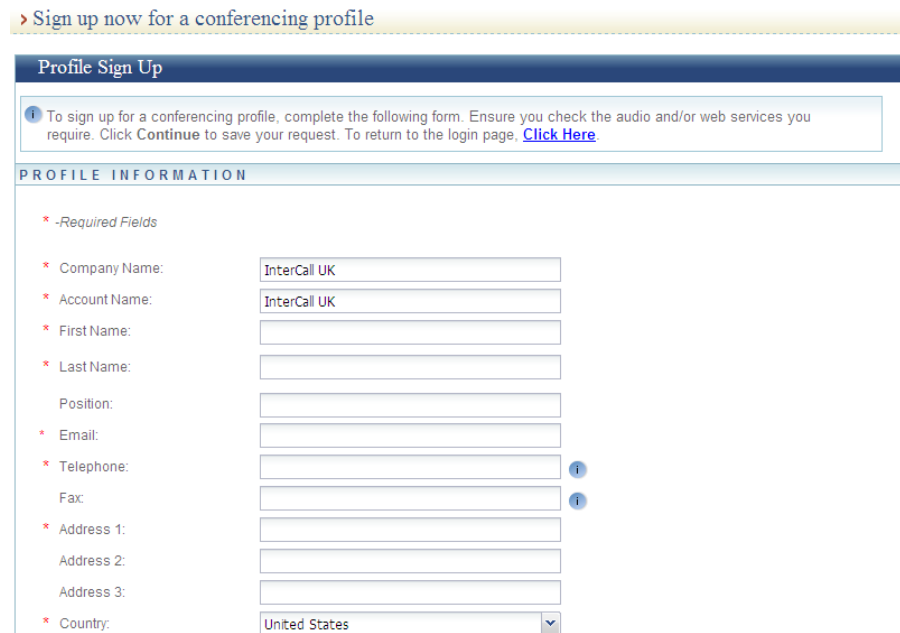
- 14 If you approve the new owner request, the user will receive a welcome email containing all their conferencing details. If you reject the request, the owner receives a short email informing them of your decision.

NEW USER INSTRUCTIONS

- 1 If you are a new user and would like to be set up with your own InterCall account, go to www-ca.intercallonline.com and enter the username and password provided by your account administrator in the **Sign Up Now** boxes.



- 2 Click **Activate Account**.
- 3 Complete the profile sign up page with your contact details.



- 4 Select the audio and/or web services you require.

ASSISTANT INFORMATION

Check box to send marketing information to your assistant.

ADDITIONAL INFORMATION

Project Accounting Code (PAC):

What services would you like? (check all that apply)

AUDIO CONFERENCING

Reservationless-Plus ⓘ Automated ⓘ
 Operator Assisted ⓘ Direct Event ⓘ

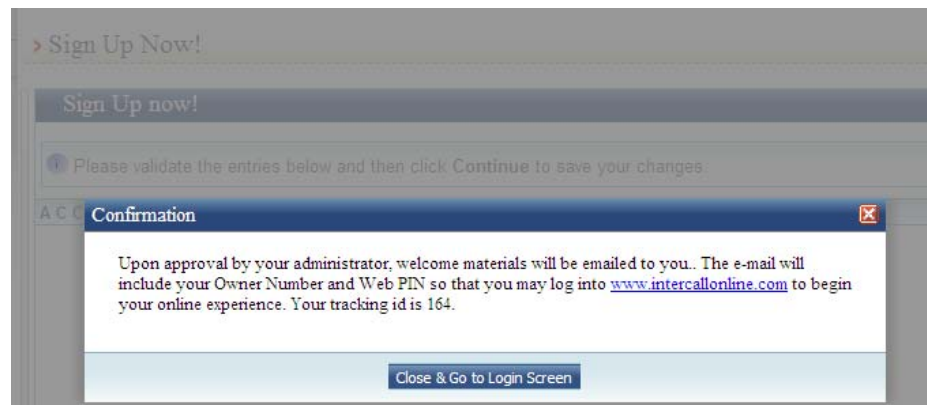
WEB CONFERENCING

Live Meeting ⓘ InterCall Unified Meeting ⓘ
 WebEx Meeting Center ⓘ InterCall Unified Meeting User Login: ⓘ
 LotusLive ⓘ InterCall Unified Meeting Password: ⓘ
 InterCall Web Meeting ⓘ

VIDEO CONFERENCING

[Click Here](#) For Video Conferencing

- 5 Click **Continue**.
- 6 Validate the information shown on the page and then click **Continue** to save your details.
- 7 A confirmation message will appear on the screen telling you that if your administrator approves your request, you will receive your welcome email shortly with information on how to log into InterCall Online. You are unable to access InterCall Online without this information.




- 8 When you receive your welcome email, locate your owner number and web PIN in the general information section of the email.
- 9 Go to www-ca.intercallonline.com.
- 10 In the top right-hand box, enter your owner number in the username field and your web PIN in the password field.
- 11 Click **Login**. You will be asked to create a username and password to access InterCall Online. For further details, please consult the InterCall Online Getting Started user guide.

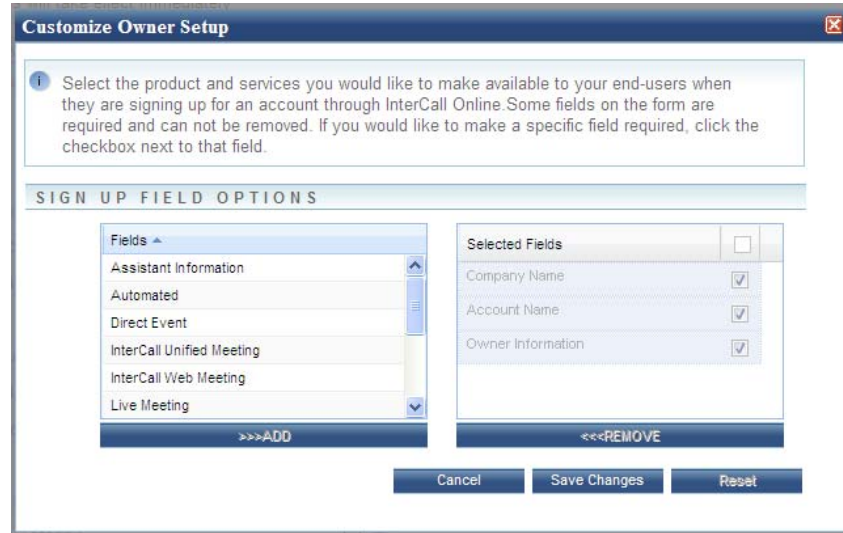
Option 2: Sign Up for a New Conferencing Account with Credit Card Billing

ADMINISTRATOR INSTRUCTIONS

- 1 Go to www-ca.intercallonline.com.
- 2 Select **Manage My Account**.
- 3 Click **View/Edit Company Information**.
- 4 In the Company Information section, select **Owner Level Billing – Optional** in the **Billing Type** drop-down menu.
- 5 Check the **Require Credit Card** box.
- 6 The **Company Username / Password** section will appear on the screen.

COMPANY USERNAME / PASSWORD	
Owner Setup:	Enabled
Portal username:	Testing
Password:
Confirm Password:
Customize Owner Setup	

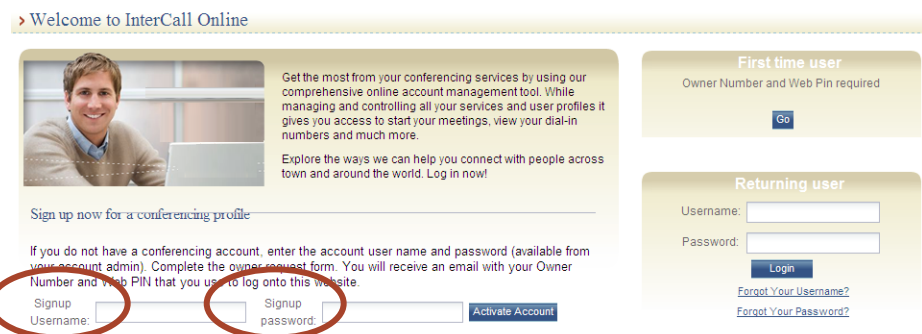
- 7 Choose **Enabled** in the **Owner Setup** drop-down menu.
- 8 Create an account username and password. These follow the same conventions as creating an InterCall Online username and password (see the InterCall Online Getting Started guide for details).
- 9 You can customize the layout of the form by clicking **Customize Owner Setup**. From the left-hand box, select the fields you would like displayed on the Owner Setup Form. Click **Add** to move them to the right-hand side of the screen. If you want to make a field required (i.e., the PAC code field), click the checkbox next to that field. Some fields are always required and cannot be changed (grayed out on the screen). When you have finished, click **Save Changes** to return to the **View/Edit Account Information** screen.



- 10 Click **Save Changes**.
- 11 Confirmation will appear on the screen that the company number has been updated.
- 15 Provide the account username and password information to users within your organization who require a new conferencing profile along with the URL for the site, www-ca.intercallonline.com.

NEW USER INSTRUCTIONS

- 1 If you are a new user and would like to be set up with your own InterCall account, go to www-ca.intercallonline.com and enter the username and password provided by your account administrator in the **Sign Up Now** boxes.



- 2 Click **Activate Account**.
- 3 Complete the profile sign up page with your contact details and select the conferencing services you require.


> Sign up now for a conferencing profile

Profile Sign Up

To sign up for a conferencing profile, complete the following form. Ensure you check the audio and/or web services you require. Click **Continue** to save your request. To return to the login page, [Click Here](#).

PROFILE INFORMATION

* -Required Fields

* Company Name:	<input type="text" value="InterCall UK"/>
* Account Name:	<input type="text" value="InterCall UK"/>
* First Name:	<input type="text"/>
* Last Name:	<input type="text"/>
Position:	<input type="text"/>
* Email:	<input type="text"/>
* Telephone:	<input type="text"/> 
Fax:	<input type="text"/> 
* Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
* Country:	<input type="text" value="United States"/>

- 4 Click **Continue**.
- 5 Complete the billing account setup page. The billing and account contact information will automatically populate with the details you provided on the sign up page. Remember to provide an account name above the Billing Contact section. We recommend you use your owner name.

Set Up a New Billing Account Profile

Click Save Changes to store your changes

COMPANY WHERE BILLING ACCOUNT PROFILE IS TO BE ADDED

Company Number:	14800
Company Name:	InterCall UK
* Account Name:	<input type="text"/>

BILLING CONTACT

* = Required Fields

* First Name:	<input type="text" value="Another"/>
* Last Name:	<input type="text" value="TestUser"/>
* Address 1:	<input type="text" value="Topeka House"/>
Address 2:	<input type="text"/>
Address 3:	<input type="text"/>
* Country:	<input type="text" value="United Kingdom"/>
* City:	<input type="text" value="Gloucester"/> * State/Province: <input type="text" value="Gloucester"/>
* ZIP/Postal Code:	<input type="text" value="GL4"/>
* Telephone:	<input type="text" value="01452581004"/> Ext. <input type="text"/> 
* Email:	<input type="text" value="atempleton@intercalleeurope.com"/>

- 6 The credit card information box will be automatically checked. Enter your credit card details: type, number, expiration date, card holder name and address. You will be unable to save your profile unless you complete this section.

CREDIT CARD INFORMATION

* Type:

* Credit Card Number:

* Expiration Date: Month: Year:

* Cardholder Name:

* Address 1:

Address 2:

Address 3:

* Country:

* City: * State/Province:

* ZIP/Postal Code:

- 7 Click **Continue**.
- 8 Validate the information shown on the page and then click **Continue** to save your details.
- 9 A confirmation message will appear on the screen and you will receive your welcome email shortly with information on how to log into InterCall Online. You are unable to access InterCall Online without this information.
- 10 When you receive your welcome email, locate your owner number and web PIN in the general information section of the email.
- 11 Go to www-ca.intercallonline.com.
- 12 In the top right-hand box, enter your owner number in the Username field and your web PIN in the Password field.
- 13 Click **Login**. You will be asked to create a username and password to access InterCall Online. For further details, please consult the InterCall Online Getting Started user guide.