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CallPilot

Fax User Guide

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CallPilot Fax User Guide

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CallPilot Fax User Guide

About CallPilot Fax

This guide explains how to use CallPilot Fax with your personal mailbox. It explains how to receive, print and send fax messages.



Note: If you need information about other CallPilot features, refer to the *CallPilot Reference Guide*.

To use this guide, you must determine which phone interface you use, and follow the procedures for that interface. For information about determining which interface you use, refer to [“Checking which mailbox interface you use” on page 5](#).

Learning about Fax

With CallPilot Fax you can access Fax features from your personal mailbox.

A fax document in a mailbox is called a fax message. Fax messages can have a voice introduction. This means that a caller can leave a fax message with or without an introductory voice message in your personal mailbox.

You can:

- retrieve and print the fax message on a fax machine
- forward the fax message to another mailbox

About the Express Messaging Line


You can have an Express Messaging Line assigned to your mailbox. A fax message sent to the Express Messaging Line bypasses the Automated Attendant and is sent immediately to your mailbox. You access the fax message the same way you access other fax messages. For more information about accessing fax messages, refer to [“Receiving a fax message” on page 8](#).

Ask your System Administrator for the telephone number of your Express Messaging Line. Then you can inform people of your direct fax line number.




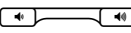

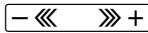


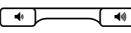
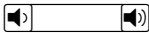
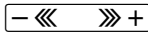



Telephone buttons




All one line and two line display telephones provide CallPilot voice prompts. On telephones with display buttons, the voice prompts are delayed for five seconds. If you do not see an option on your telephone display, wait for the voice prompt to announce the additional options.

To use Fax features, press the display buttons or the dialpad buttons on your telephone.


When you see a display button like this: **PLAY**, or a dialpad button like this: , press either button to activate the CallPilot feature. This guide shows you both methods.


This table shows the Nortel Networks 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.

Checking which mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot. The System Administrator determines which interface is assigned to your mailbox.

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 button options to open your mailbox.
- 2 Check the display to see which interface you use:

```
0 new 0 saved
PLAY REC ADMIN
```

This is the Norstar Voice Mail interface.

```
No messages
COMP MBOX EXIT
```

This is the CallPilot interface.

- 3 Press **[*]** to end the session.

Telling callers about fax in your mailbox greeting

In your mailbox greeting, tell callers that they can leave fax messages in your mailbox. Tell callers that they must call from a fax machine telephone to send you a fax message. The caller must press START/SEND on the fax machine. CallPilot automatically receives and stores the fax message in your mailbox. This is an example Personal mailbox greeting:

“Hello. You have reached Brian Purdy with Ideal Office Machines. I am in the office today, but I am currently away from the phone. Please leave your name, telephone number and a brief message after the tone. If you want to send me a fax and you are calling from a fax machine telephone, press the START/SEND button on the fax machine now, or when this message ends.”

For more information about mailbox greetings, refer to the *CallPilot Reference Guide* or ask your System Administrator.

To record a mailbox greeting

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

```
Greeting options
REC  CHOOSE  CFWD
```

- 3 Press **REC** or **[1]**.

```
Greeting:
PRIME  ALT  PERS
```

- 4 Press **PRIME** or **[1]** to record the Primary greeting or press **ALT** or **[2]** to record the Alternate greeting.

```
Record now?
YES  NO  QUIT
```

- 5 Press **YES** or **[1]** and record your greeting at the tone.

```
Record greeting:
RETRY  OK
```

- 6 Press **OK** or **#** to end the recording.

Accept greeting?
RETRY PLAY OK

- 7** Press **OK** or **#** to accept the recording
or
press **PLAY** or **1** to listen to the greeting
or
press **RETRY** or **2** to re-record the greeting.
- 8** Press **⏏** to end the session.

Receiving a fax message

Fax messages can contain a voice message that a caller records to introduce the fax message, or they can contain just the fax message.

A caller can send a fax message to your personal mailbox by using the autosend feature on their fax machine. If the call is answered by the Automated Attendant, the call transfers to the designated Fax answering extension. If the call is answered by a mailbox, the fax message is placed in the mailbox. If you answer the call, you hear a fax tone. Transfer the fax call to your mailbox.

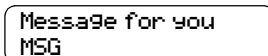
Transferring a fax call to your mailbox

If you answer a call and hear a fax tone, a caller is attempting to send a fax message to your mailbox. You can transfer the call to your mailbox.

To transfer a fax call to your mailbox

- 1 Press **[Transfer] 9 8 6**.
Do not put the call on hold.
- 2 Enter your mailbox number.
The fax message is left in your mailbox.

When you receive a message in your mailbox, your telephone display shows:



Message for you
MSG

This display indicates that you have a new voice message or a fax message in your mailbox. To check for messages, you must open your mailbox.

Opening your mailbox

To open your mailbox - Norstar Voice Mail

1 Press .

Pswd:
OTHR RETRY OK

2 Enter your mailbox password and press or
or
if you are at another extension, or if you are using a Guest mailbox, press or to display the **LOG:** prompt. When this prompt appears, enter your mailbox number and password. Your mailbox number is usually the same as your extension.

1 new 1 saved
PLAY REC ADMIN

3 After you open your mailbox, the telephone display shows how many new and saved messages you have.
A voice prompt announces how many new and saved voice and fax messages you have.
In this example there is one new message and one saved message.

To open your mailbox - CallPilot

1 Press .

Mbox:
RETRY OK

2 Press
or
if you are at another extension, enter your mailbox number and then press or .

Your mailbox number is usually the same as your extension.

Pswd:
RETRY OK

3 Enter your mailbox password and press or .

After you open your mailbox, the telephone display shows how many new messages you have.
A voice prompt announces how many new and saved fax messages you have.

Printing fax messages

You can print the fax messages in your mailbox on any fax machine. You can print all of your fax messages at once or individually.

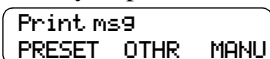
An average text fax message uses 10 seconds of mailbox message time per page. A fax message that contains graphics can use as much as two minutes of mailbox message time per page. Because fax messages can take up a lot of mailbox space, after you print or forward your fax messages, delete them from your mailbox.

If you print all your fax messages at once, you cannot listen to any voice introductions that are included with the fax messages. If you do not listen to a voice introduction, the fax message remains “new” in your mailbox and you can listen to the voice introduction later.

If you print each fax message individually, you can listen to the introduction before you print the fax message.

About destinations for printing fax messages

When you print a fax message, you can print it from:



Fax destinations

Preset	You can set up a fax machine as the default destination. When you print and you select Preset, the fax machine prints at the default destination. Unless you specify Other, faxes print at the default destination.
Other	When you send a fax message to print and you select Other, you must enter a phone or extension number as the destination.
Manual	We recommend you do not use the manual option.

Fax messages are preceded by a cover page if you select Preset or Other. A cover page is not added for fax messages you print from a fax telephone. For more information refer to [“Fax cover page” on page 16](#).

To assign a preset fax machine

If you assign a preset fax machine, your fax messages print at the same fax machine every time.

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

- 2 If you use the CallPilot interface:
 - Press **[8] 0** to open the Mailbox Options menu
 - Press **[3]** to open the Fax Options menu
 - Go to step 3

If you use the NorstarVoice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[7]**
- Go to step 3

No Preset.

- 3 This display appears if there is no preset fax machine.
If the fax machine is preset, the display shows: **Preset fax.**
If you want to assign a different machine as the preset fax machine, press **CHNG.**

Destination:
PHONE EXT

- 4 Press **PHONE** or **[1]** to assign the phone number of a fax machine or
press **EXT** or **[2]** to assign the extension number of a fax machine.
This example shows assigning the phone number of a fax machine.

Ph:
RETRY **OK**

- 5 Enter the fax telephone number and press **OK** or **[#]**.

<>
ADD **OK**

- 6 Press **OK** or **[#]** to accept the fax telephone number represented by the <>
or
press **ADD** to add special characters to the fax telephone number.
and follow the prompts.
After you add special characters press **OK** or **[#]**.

- 7 Press **[END]** to end the session.

To print all your fax messages

Use this procedure if you want to print all your new or saved messages.

If you want to print just one message, refer to [“To print an individual fax message”](#) on page 14.

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

- 2 If you use the CallPilot interface:

- Press **[7] 7** to open the Print Command menu
- Go to step 3

If you use the NorstarVoice Mail interface:

- Press **[1]**
- Go to step 3

- 3 If you use the CallPilot interface:

- Press **MSG** or **[1]** to print an individual message
or
- press **NEW** or **[2]** to print all unprinted fax messages
or
- press **ALL** or **[3]** to print all faxes with their attachments

If you use the Norstar Voice Mail interface and you have new fax messages:

- Press **NEW** or **[1]** to print all your new fax messages
or
- press **SAVED** or **[2]** to print all your saved fax messages

If you do not have any new fax messages the display in step 4 appears.

```
Print msg
PRESET OTHR MANU
```

- 4 Press **PRESET** or **[1]** if you want to print on the preset fax machine and go to step 8
or
press **OTHR** or **[2]** if you want to print on a fax machine other than the preset fax machine and go to step 5.

Destination:
PHONE EXT

- 5 Press **PHONE** or **1** to print fax messages at a fax telephone number
or
press **EXT** or **2** to print fax messages at a fax extension number.
This example shows entering the phone number of a fax machine.

Ph:
RETRY OK

- 6 Enter the fax telephone number and press **OK** or **#**.

<>
ADD OK

- 7 Press **OK** or **#** to accept the fax telephone number represented by <>
or
press **ADD** to add special characters to the fax telephone number and follow the voice prompts.




Printed <x> ms9s

- 8 The display shows the number of fax messages printed.
- 9 Press **END** to end this session.


After you end the session, CallPilot prints the fax messages on the preset fax machine.
For information about changing the preset fax machine, refer to [“To assign a preset fax machine”](#)
on page 11.

To print an individual fax message

Use this procedure if you want to print an individual fax message.

- 1 Press  9 8 1.
Follow the voice prompts or the display button options on your telephone to open your mailbox.
- 2 If you use the CallPilot interface:
 - Press   to open the Print Command menu
 - Go to step 3



If you use the NorstarVoice Mail interface:

- Press  until you locate the fax you want to print
- Go to step 3

```
<date> Fax:1
<< STOP >>
```

- 3 Wait until the prompt announces the Fax ID number, and then press  to print the fax message.


```
Print msg
PRESET OTHR MANU
```

- 4 Press **PRESET** or  to print on the preset fax machine or press **OTHR** or  if you want to specify another fax machine to print the message on, and then enter the number of the fax machine.

```
Printed msg
```

- 5 The display shows the message is printed.

```
End of message
COPY ERASE NEXT
```

- 6 Press  to end this session.

After you end the session, CallPilot prints the fax messages on the fax machine you specified.

To print fax messages from a fax telephone

- 1 From a fax machine telephone, call into a line that is answered by the Automated Attendant.
- 2 Press ***** *****, or in the UK press **8** **8**, to access your mailbox while the Automated Attendant Greeting plays.
- 3 Log on to your mailbox:
 - If you use the Norstar Voice Mail interface, enter your mailbox number and password and press **#**
 - If you use the CallPilot interface, enter your mailbox number and press **#**, then enter your password and press **#**
- 4 Send the fax message to print:
 - If you use the Norstar Voice Mail interface, press **1** to print your fax messages
 - If you use the CallPilot interface, press **7** **7** to print your fax messages
- 5 If you have new and saved fax messages, you can print either all new or saved fax messages:
 - press **1** to print all new fax messages
 - press **2** to print all saved fax messages.

Step 5 is bypassed if you have only new fax messages or only saved fax messages.
- 6 Press **3** to use the Manual option to print the new fax messages.
- 7 Press **START/SEND** on the fax machine.
- 8 Replace the fax machine telephone handset.
The session ends when all the faxes are printed.

CallPilot prints the fax message on the assigned fax machine.

Fax cover page

A fax cover page prints with each fax message you print using the Preset and Other feature. The fax cover page shows:

- the date and time the fax prints
- the name and telephone number of the mailbox owner
- the destination fax number
- the Fax ID number (if you print a single fax message)
- the number of pages to follow



Note: A fax cover sheet is not added if you print a fax from a fax telephone.

Sending fax messages

To send the fax message to a personal mailbox you must call from a fax machine telephone. You can include a voice introduction to a fax message you send to a personal mailbox. The voice introduction must be at least three seconds long. The system times out after five seconds of silence.

To send a fax message to a personal mailbox

- 1** Place the document that you want to send in the fax machine.
- 2** From the fax machine telephone dial the CallPilot telephone number of the person you want to send a fax to.
- 3** Wait for the mailbox greeting or let the CallPilot operator transfer you to the mailbox to leave a fax message. If the person you are calling answers their telephone, tell them to transfer you to their mailbox so you can send a fax.
- 4** After the mailbox greeting plays, wait for a beep and record an introduction for the fax message. Do not hang up the telephone.
- 5** Press START/SEND on the fax machine.
- 6** Replace the fax machine telephone handset. The session ends when the transmission is complete.

Forwarding fax messages

You can forward a fax message that you have received to another mailbox and add a voice introduction. If you record a voice message it must be longer than three seconds. The system times out after five seconds of silence.

The message appears as a fax message in the recipient's mailbox. If you cannot forward a fax message, ask your System Administrator if your mailbox is set up to allow you to forward fax messages.

You can send the same fax message to more than one person, but not to a Group List.

For information on forwarding a fax message to an external number, refer to [“To forward a fax message to a mailbox - Norstar Voice Mail” on page 19](#).

When you forward a fax message, a new cover page is added to the original fax message, becoming part of the new message. If the fax message already has a CallPilot-generated fax forward cover page, it is replaced by a new Fax forward cover page.

Fax forward cover page

A fax forward cover page contains the same information as a fax cover page plus:

- the recipient's name
- the Fax ID number if the fax is forwarded to an external number

To forward a fax message to a mailbox - Norstar Voice Mail

<date> Fax:1
 << STOP >>

End of message
 COPY ERASE NEXT

Copy fax
 MBOX OTHR

Record Intro?
 YES NO

Record message:
 RETRY PAUSE OK

Accept rec?
 RETRY PLAY OK

Mbox:
 DIR QUIT

Wayne, Paul
 OPTS CC SEND

Another copy?
 YES QUIT

- 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]** if you have a new fax message or press **[6]** to review your messages until you find a saved 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 **YES** or **[1]** to record an introduction to the fax message or press **NO** or **[2]** and go to step 10 if you do not want to record an introduction to the forwarded fax message.
- 7 Record the introduction and press **OK** or **[#]** to end the recording or press **RETRY** or **[1]** to re-record the introduction or press **PAUSE** or **[2]** to pause while you record the introduction.
- 8 Press **OK** or **[#]** to accept the recording.
- 9 Enter the mailbox number you want to forward the fax message to or press **DIR** or **[#]** to search the Company Directory.
- 10 Press **SEND** or **[#]** to forward the message without a delivery option or press **OPTS** or **[3]** to assign message delivery options. For information about delivery options refer to the *CallPilot Reference Guide*.
- 11 To send this message to another mailbox owner, press **YES** or **[1]** and repeat steps 6 to 11 or press **QUIT** to end the session.

To forward a fax message to a mailbox - CallPilot

```
End message
RESP DEL NEXT
```

```
End message
PRINT DEL NEXT
```

```
To:
NAME SPEC CNCL
```

```
To:<xxxx>
RETRY OK
```

```
Empty
REC
```

```
Msg options
URG PRIV OTHR
```

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options on your telephone to open your mailbox.
- 2 Press **[2]** to play the first message
or
press **[6]** until you find the fax message you want to forward.
- 3 Press **[7] [3]** to forward the message.
- 4 Enter the mailbox number you want to forward the fax message to and press **OK** or **#**
or
press **NAME** or **[1] [1]** to search the Company Directory.
- 5 Press **OK** or **#** to end the list of addresses.
- 6 If you want to attach a voice message, press **REC** or **[5]** and record your message.
- 7 If you want to attach message options, press **[7] [0]** to assign message options.
- 8 Press **[7] [9]** to send the message.
- 9 Press **[End]** to end the session.

To forward a fax message to an external number - Norstar Voice Mail

You can forward a received fax message to an external number. However, you cannot add an introductory voice message to the fax message.

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options on your telephone to open your mailbox.
- 2 new 0 saved
PLAY REC ADMIN
- 2 Press **PLAY** or **[2]** to play the first 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.
- <date> Fax:1
<< STOP >>>
- 4 Press **COPY** or **[5]**.
- End of message
COPY ERASE NEXT
- 5 Press **OTHR** or **[2]**.
- Copy fax
MBOX OTHR
- 6 Enter the recipient's name. The name can be a maximum of eight characters. Using the telephone dialpad, enter the name of the recipient. After each letter, press **[#]** to enter the next letter.

If you make an error in the name, press **RETRY** and re-enter the name.

Press **OK** to accept the name.
- Name:
RETRY BKSP OK
- 7 Press **PHONE** or **[1]** to enter the fax telephone number.
- Destination:
PHONE EXT
- 8 Enter the fax telephone number and press **OK** or **[#]**.
- Ph:
RETRY OK
- 9 Press **OK** or **[#]** to accept the fax telephone number represented here by **<x>**
or
press **ADD** to add special characters to the fax telephone number. For information on adding special characters, refer to ["Adding special characters to a fax telephone number"](#) on page 25.
- <x>
ADD OK
- 10 CallPilot forwards the fax message.
- Msg sent
- 11 Press **YES** or **[1]** and repeat steps 6 to 11 to send this message to another external number
or
press **QUIT** if you are done.
- Another copy?
YES QUIT
- 12 Press **[*]** to end the session.

To forward a fax message to an external number - 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 to open the Print Command menu.
- Print
MSG NEW ALL

3 Press MSG or to forward the current message
or
press NEW or to forward all your new fax messages
or
press ALL or to forward all your new and saved fax messages.
- Print msg
PRESET OTHR MANU

4 Press OTHR or to specify the fax machine you are forwarding the fax message to.
- Destination:
PHONE EXT

5 Press PHONE or .
- Ph:
RETRY OK

6 Enter the phone number of the fax machine you are forwarding the fax message to.
- <xxx>
ADD OK

7 Press OK or to accept the phone number
or
press ADD or to add special characters.
- Printed msg

8 The display shows the message is printed.
- 9** Press to end the session.

About Fax Group messages

Send a Fax Group message if you want to send a group a fax message that pertains to them. Fax Group Lists are created by the System Administrator.

Fax Group Lists

If you frequently fax information to the same group of people, use a Fax Group List.

A Fax Group List is a collection of fax machines at other locations. When you send a fax message to a Fax Group List, you enter only the address of the list, but each fax machine in the Fax Group List receives the fax message. Ask your System Administrator for a list of fax machines in each Fax Group List.

If you need a Fax Group List, ask your System Administrator to create one for you. When you give the System Administrator the information, include:

- the names of the recipients
- a list of the fax machine numbers
- the Fax Group List name

Before you send a Fax Group message, be sure your System Administrator has created the Fax Group List, and the list contains all the fax machines that are to receive the fax message.

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.

```
<date> Fax:1
<<< STOP >>>
```

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

```
End of message
COPY ERASE NEXT
```

- 4 Press **COPY** or **[5]**.

```
Copy fax
MBOX OTHR
```

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

```
Record Intro?
YES NO
```

- 6 Press **NO** or **[2]**.

Do not record an introduction because Fax Group List recipients do not hear voice introductions.

```
Mbox:
DIR QUIT
```

- 7 Enter the Fax Group List number.

<GList.name>
OPTS CC SEND

- 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.
For information about delivery options refer to the *CallPilot Reference Guide*.
- 9 Press **[End Call]** to end the session.

To send a Fax Group Message - CallPilot

- 1 Press **[Exit]** **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 CNCL

- 5 Press **7** **3** 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.
External Group List recipients do not receive voice introductions to fax messages.

Ms9 options
URG PRIV OTHR

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

Ms9 delivered

- 8 Press **7** **9** to send the message.
- 9 Press **[End Call]** to end the session.

Adding special characters to a fax telephone number

Follow the voice prompts or press **ADD** to add special characters to a fax telephone number.



Note: If you are adding special characters, do not press the dialpad buttons **#** to enter #, or ***** to enter *. Press the button directly below the option on a two line display telephone, or listen to the voice prompts.

Press	To
2 or DIGS	resume adding digits to the destination phone number.
3 or PAUS	enter a timed pause that appears as P on the display. Pauses are four seconds long.
4	recognize dial tone (behind PBX). The Recognize Dial Tone special character appears as D on the display.
5 or QTHR #	enter #.
6 or QTHR *	enter *.
TONE	recognize dial tone (behind PBX). The Recognize Dial Tone special character appears as D on the display.
*	cancel and retry.

