User Guide

Verizon Conferencing e-Scheduling Tools Installation Guide
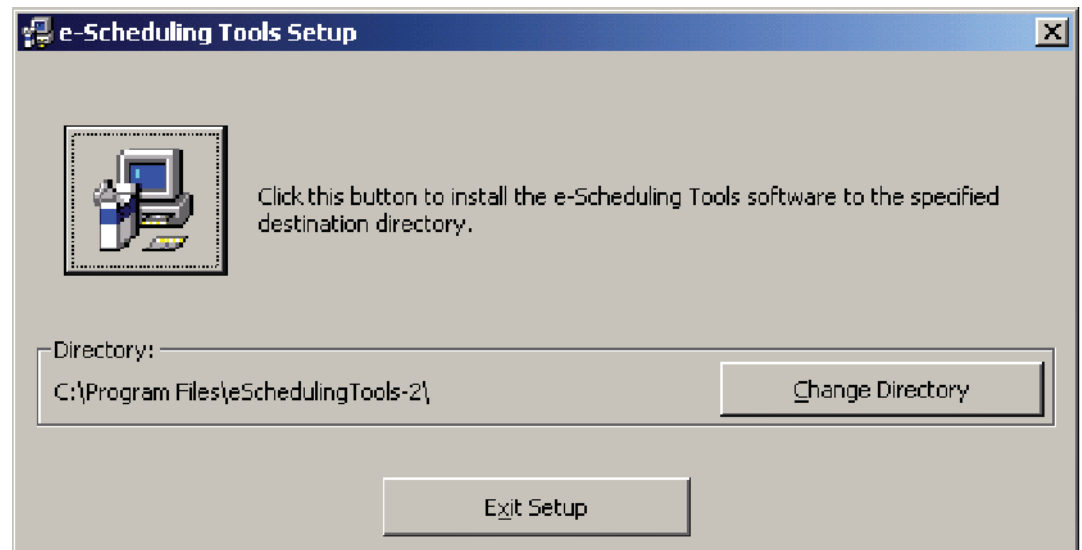
Step-by-Step Installation

1. It is strongly recommended that you close all applications before proceeding.
   Click **OK**.
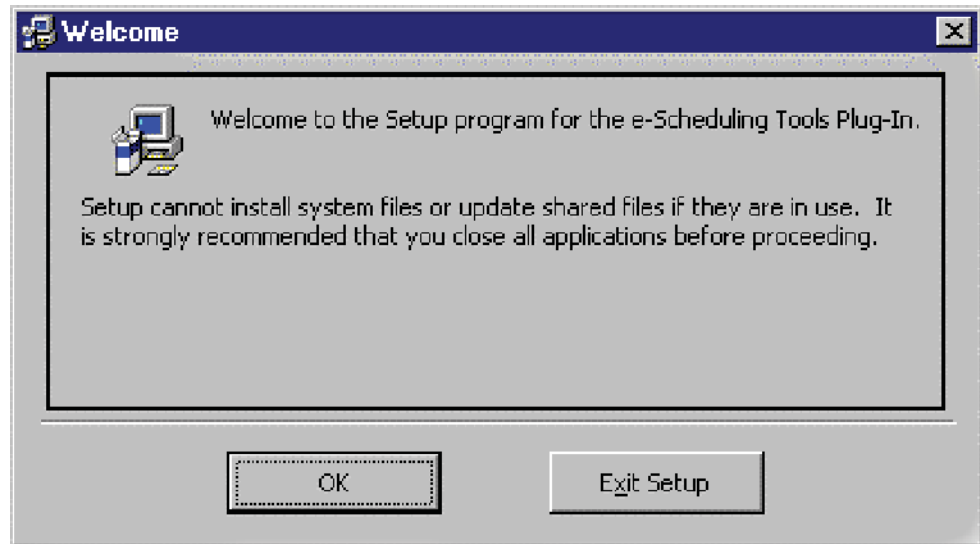
2. Click the **button on the left side of the screen** if the directory is okay. Otherwise click on **Change Directory** and select where you want the software saved.
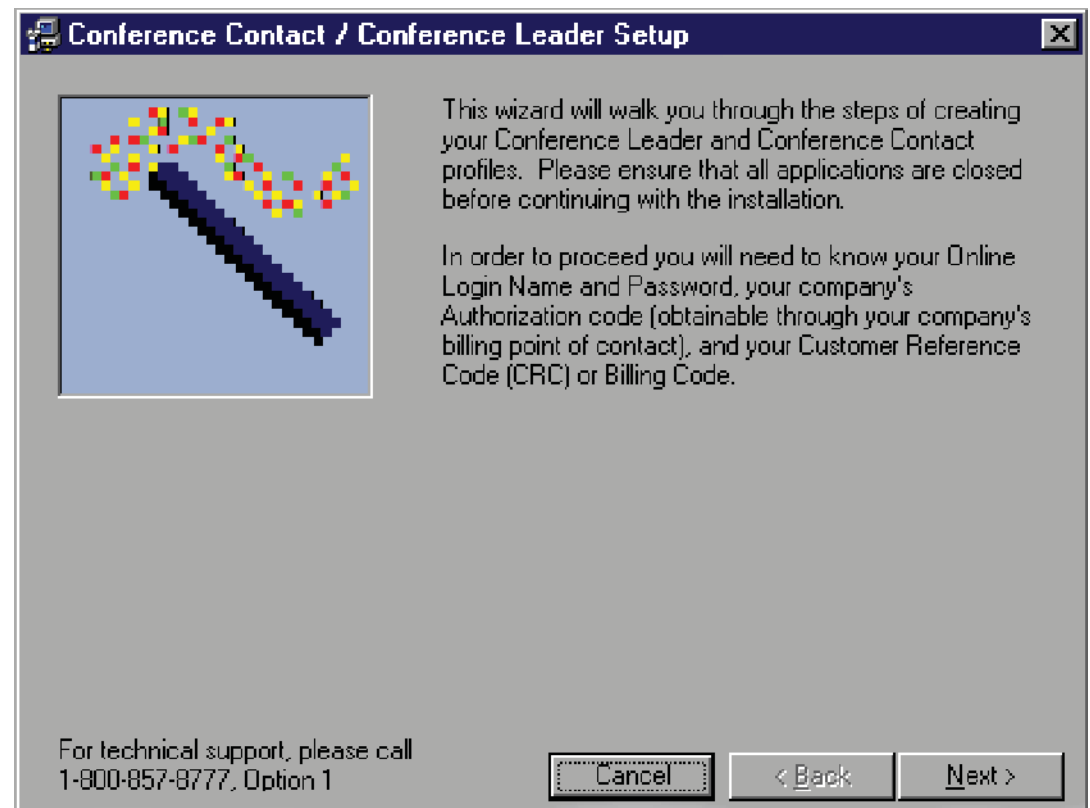
3. The wizard will walk you through the steps to set up the **Conference Contact and Leader profiles**. You will need to know your:

- Verizon Conferencing Online Login Name
- Password
- Authorization Code
- CRC or Billing Code

Note: You should have an e-mail containing an Online Login Name and Password, which are case-sensitive.
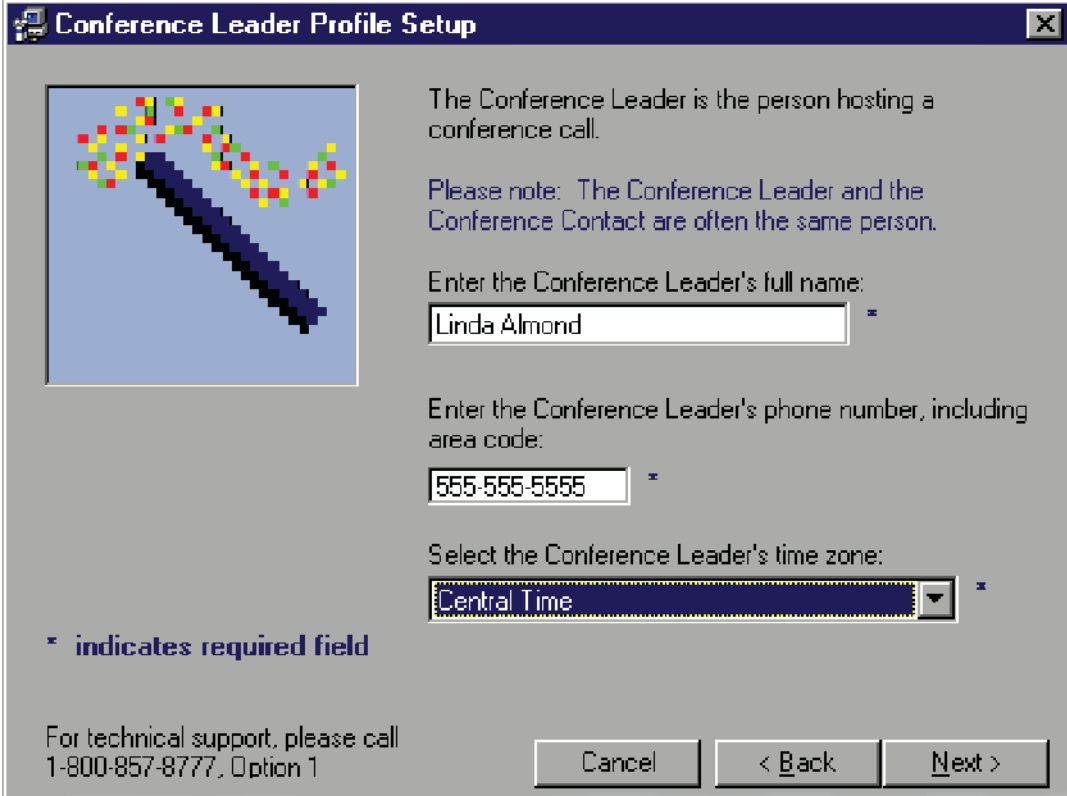
Click **Next**.

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4. At the next screen, enter:

- Conference leader's full name
- Phone number (You can put in the separators.)
- Time zone

Click **Next**.

5. Enter the Conference Leader's:

- Verizon Conferencing Online Login Name
- Authorization Code
- Billing Code

Click **Next**.
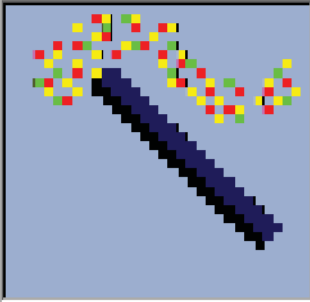
6. If the Leader and the Contact are the same person, then click on **Copy Leader to Contact** button. Type in the Contact's phone number.

   Click **Next**.

7. Enter your:

- Verizon Conferencing Online Login Name
- Password

   Note: Upon Creating Your Profile in step #1 above, you should have received an e-mail containing your Online Login Name and Password, which are case-sensitive. If you already have a profile because you have used the website in the past to schedule calls, then you can use that one.

   Click **Next**.

8. If you want the **Net Conference** preference, skip to step #10 in this document.

   If you do not select Net Conference, the Net Conference options below it will be grayed out.

   Click **Next** to move on to select the total number of lines needed for your calls.

Conference Call Preferences Setup   ✕

The following preferences can be changed at the time of reservation:

☐ Net Conference

Enter Net Leader Passcode: |Linda|

Enter number of Net Conference participants: | |

Select features you would like to use for your Net Conferences:

┌─ Features ──────────────────────
☑ Net Participant List
☐ Operator Hosted
☐ SSL Encryption
└─────────────────────────────────

┌─ Recording ─────────────────────
☐ Net Replay Duration |30| ⬍ days
☐ FTP Download
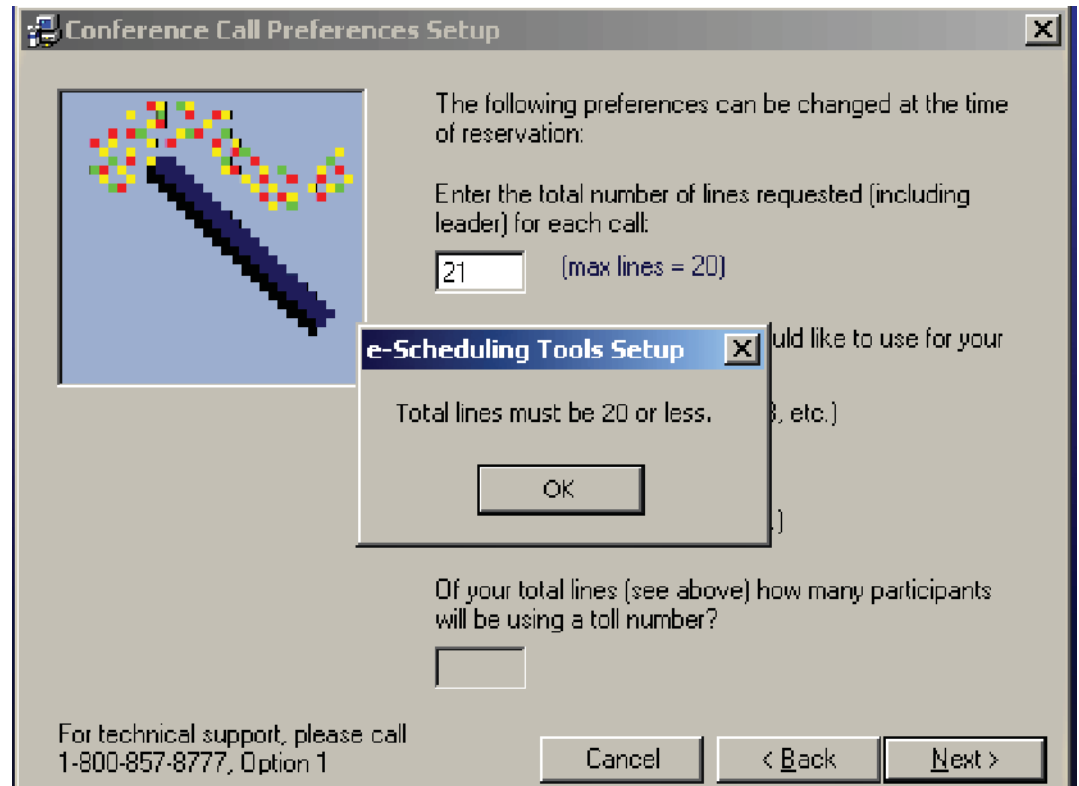└─────────────────────────────────

For technical support, please call
1-800-857-8777, Option 1

| Cancel | | < Back | | Next > |

9. If you have not selected the Net Conference check box, you can select a maximum number of 20 lines for your calls, which will be **audio-only**.

   Click **Next**.

10. If you want the Net Conference preference, click the **Net Conference** check box. Enter the desired Net Leader Passcode. Enter the number of Net Conference participants – up to 100. Select the desired features and recording options.

    Note: The line number, features, and recording options may be changed later and with each call you set up.

    Click **Next**.

11. If you selected the Net Conferencing check box above, you can set your **Net Conference** preferences. You can select up to 100 lines. Then, select the desired access types.

    Note: The line number and the access types may be changed later and with each call you setup.
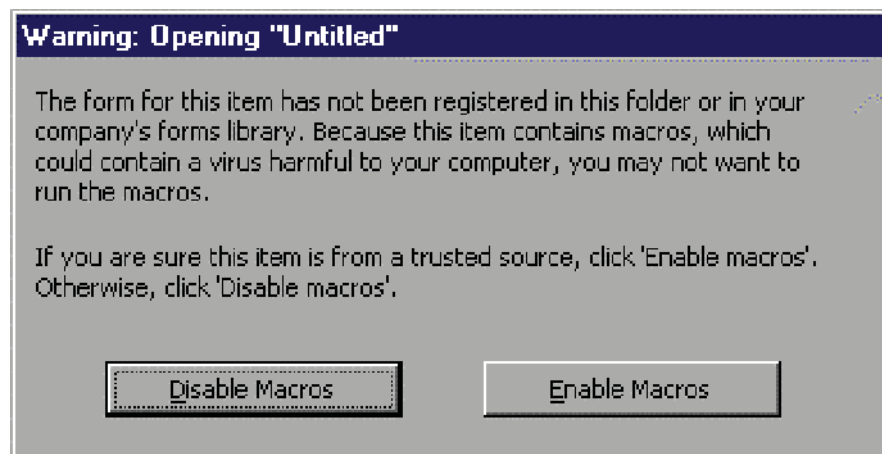
    Click **Next**.

12. Do you have Microsoft Outlook security patches installed? If so, skip this step.

     Otherwise, this step is very important.

Installation In Progress ☒

The Conference Leader and Conference Contact profiles will now be created.

Click the 'Next' button to continue.

You will be required to click the 'Enable Macros' button three times to complete the installation process. Please note that this process may take 20-45 seconds.

For technical support, please call 1-800-857-8777, Option 1

[Cancel] [< Back] [Next >]

     You must enable the **Macros** three times as the pop-up appears.

Warning: Opening "Untitled"

The form for this item has not been registered in this folder or in your company's forms library. Because this item contains macros, which could contain a virus harmful to your computer, you may not want to run the macros.

If you are sure this item is from a trusted source, click 'Enable macros'. Otherwise, click 'Disable macros'.

[Disable Macros]   [Enable Macros]

13. If you have the Microsoft Outlook security patches already installed in your Outlook, you will not have to enable Macros.

    Instead, you will see this screen. Please check the box and select **10 minutes** from the pull-down menu.

    Note: You may see this message again when you are scheduling a call. If you do, please select 5 minutes or more from the pull-down menu.
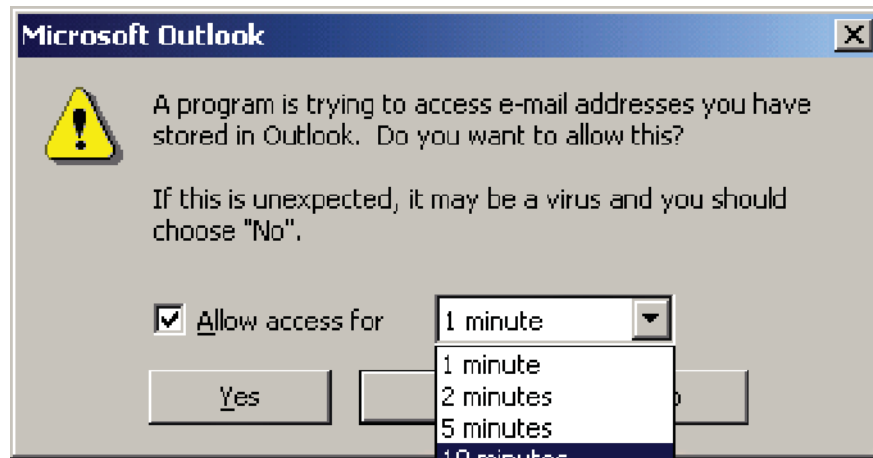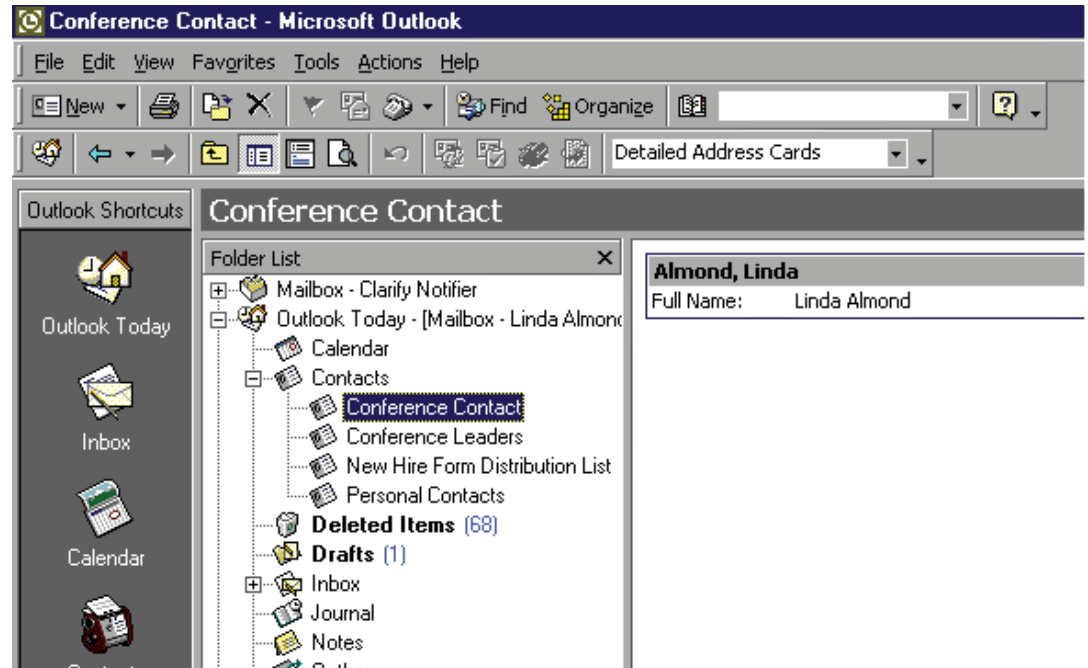

14. The installation is complete! You will be prompted to shut down your computer. The Read Me file will appear, which you can print for future reference.

Changes in Your Outlook®

Two new subfolders will be created in your Contacts folder.

e-Scheduling Tools requires the current view to be set to **Detailed Address Cards** for the Conference Contact and Conference Leader. To do this:

1. Make sure the **Folder List** is displayed by selecting **View** from the menu bar and selecting **Folder List**.
2. Expand your **Contacts** folder by clicking on the **+** sign to its left or by double-clicking the **Contacts** folder.
3. Highlight the **Conference Contact** folder within the **Contacts** folder by clicking on it once.
4. Select **View** in the menu bar.
5. Select **Current View** from the menu.
6. Select **Detailed Address Cards**.
7. Highlight the **Conference Leader** folder within the **Contacts** folder by clicking on it once.
8. Select **View** from the menu bar.
9. Select **Current View** from the menu.
10. Select **Detailed Address Cards**.

> **Note:** Only one Conference Contact is allowed at any one time.

Managing Your Conference Leaders
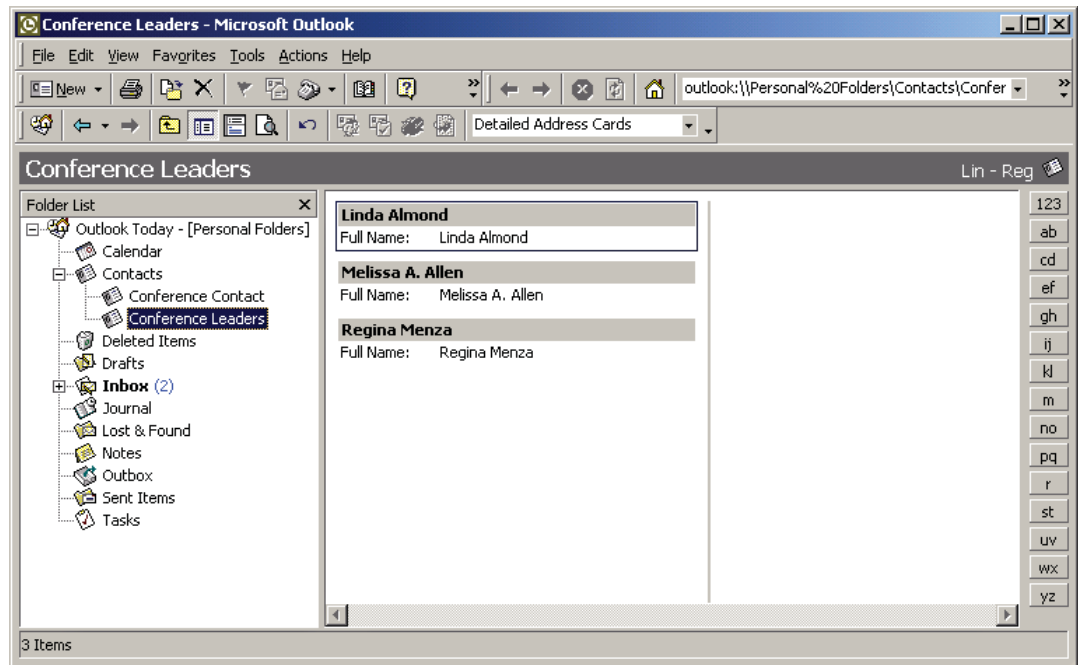
You can add multiple leaders with various profiles and CRC or billing information. To do this:

1. Make sure the **Folder List** is displayed by selecting **View** from the menu bar and selecting **Folder List**.
2. Expand your **Contacts** folder by clicking on the **+** sign to its left or by double-clicking the **Contacts** folder.
3. Highlight the **Conference Leaders** folder within the **Contacts** folder by clicking on it once.
4. Select **Actions** in the menu bar.
5. Select **New Conference Leader** from the menu.
6. Fill in the details for each leader's profile, including Leader's Name, Phone Number, Online Login Name, Authorization Code, Customer Reference Code (CRC) or Billing Code, and Time Zone. You are also provided with the opportunity to set up Audio and Net Conference defaults for each leader.

    Note: Your defaults can be changed when you schedule a call.

Scheduling a Conference Call

1. Click on **Calendar**.

2. Go to **Actions** in the menu bar.

3. Select **New Appointment** with Conference Call.
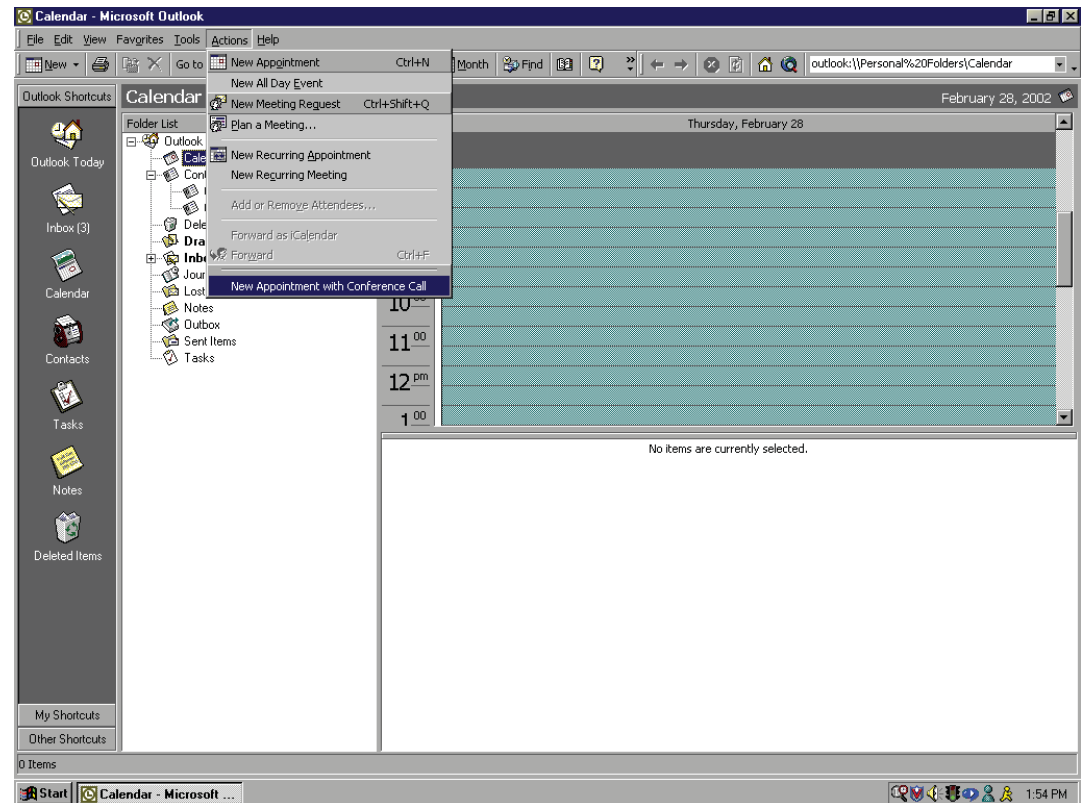
4. Click on **Invite Attendees**. Add the names of your conference participants, either by using the Address Book or by manually typing each participant's e-mail address.
5. Type in the **Subject** of the conference call.
6. Select **Date** and **Time** of conference call.
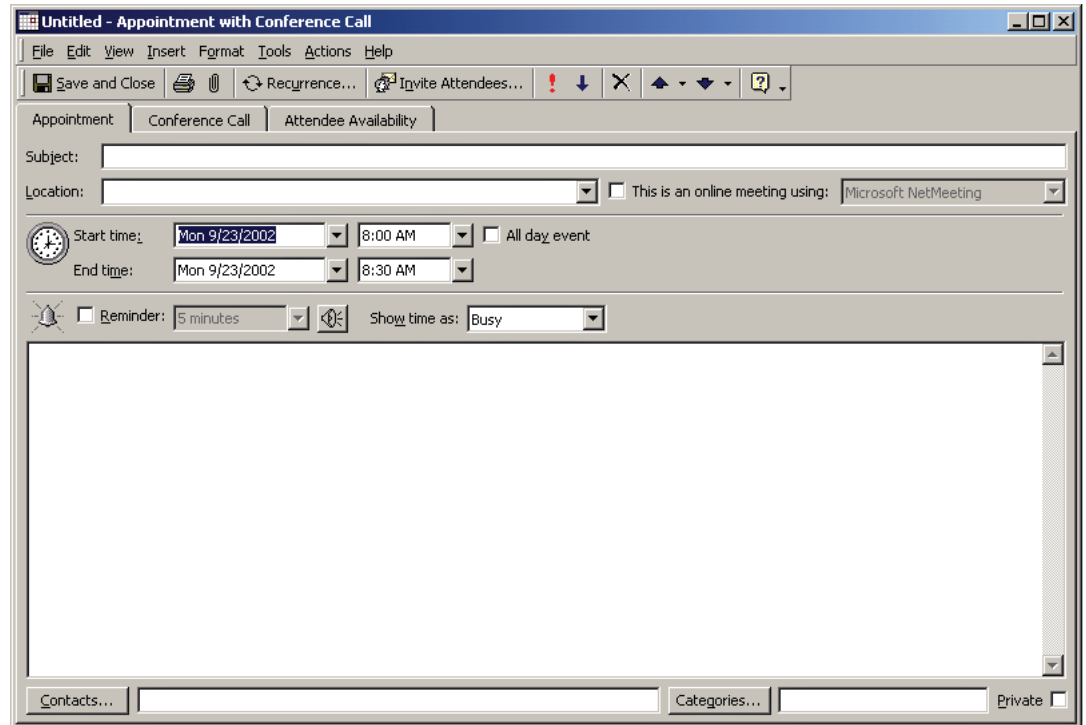
7. Select the **Conference Leader** from the pull-down menu. The fields will populate with the selected leader's information.

8.   Select the **number of lines** needed for this call.

   Note: If the Net Conference check box is checked, the maximum number of lines is 100.
   If the Net Conference check box is not checked, the maximum number of lines is 20.

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9. Select the type of **Phone Numbers and Lines** you wish to use for this call.

10. Select any **Features** you would like for your call, including any Net Conference features.

Click the **Schedule Conference** button.

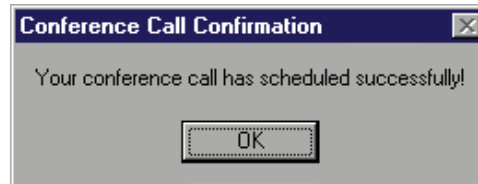The following screen shots are examples of windows you will see during the rest of the scheduling process.

Appointment With Conference Call

Click **OK**.
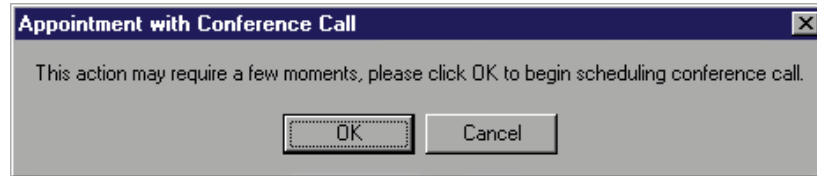
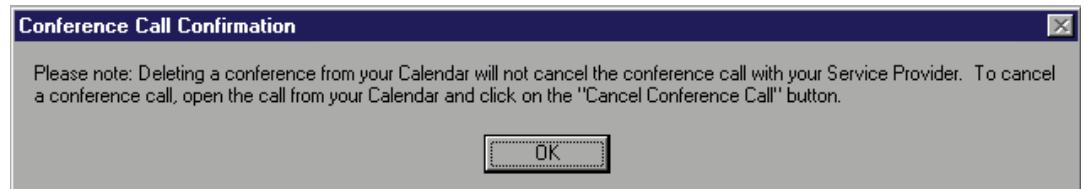**Conference Call Confirmation**

Click **OK**.

Conference Call Confirmation

This pop-up reminds you how to cancel the call in Outlook.

Click **OK**.

Note: Please see the next section, "Canceling a Conference Call."

Appointment With Conference Call

1. The **Appointment** tab displays the call details.

   For your reference: The Confirmation Number is displayed on the Conference Call tab.

   You can even type a note to your participants and add an attachment!

   Finally, click **Send** to send the e-mail notification to your conference participants.

Tip: You can add your Signature to the bottom as you would a regular e-mail.

2. E-Scheduling Tools will now automatically populate your Calendar with the scheduled conference call.

    To view the call information in the future, **double-click** on it from the Calendar view.
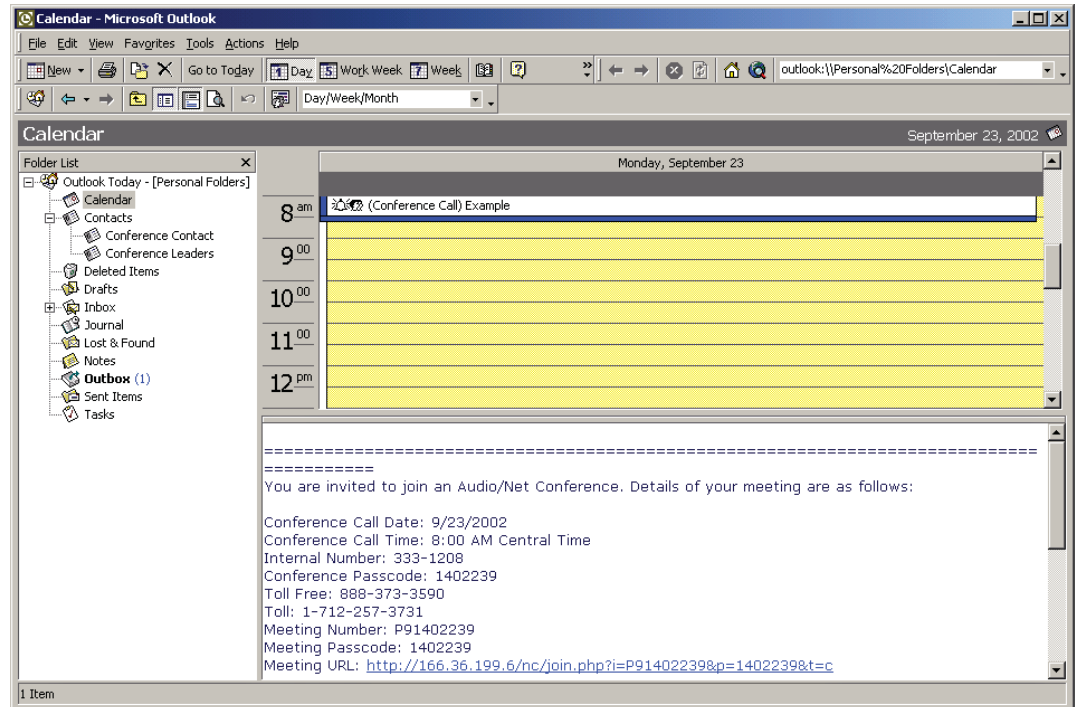
Canceling a Conference Call

Deleting a conference call from your Calendar does not cancel that call with your service provider. Below are the steps necessary to cancel a conference call.

1. Open the Conference Call by **double-clicking** on it in your Calendar.

2. Click on the **Conference Call** tab.

3. Click on the **Cancel Conference Call** button.

Note: You will see the button has changed to **Reschedule Conference**, and the Cancel Conference Call button is no longer grayed out.

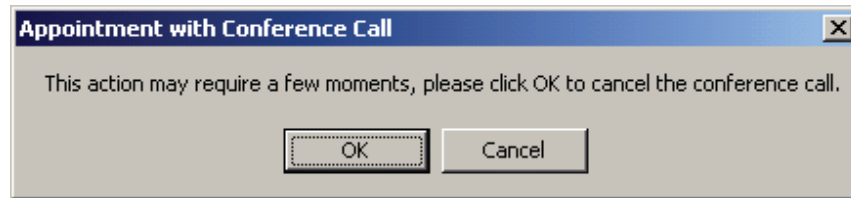4. Click **Yes**.
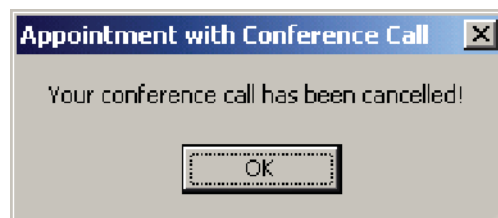
5. Click **OK**.

Appointment with Conference Call

This action may require a few moments, please click OK to cancel the conference call.

OK   Cancel

6. Click **OK**.

Appointment with Conference Call

Your conference call has been cancelled!

OK

7. Click **Yes**, if you want to delete this Appointment with Conference Call from your Calendar.

Appointment with Conference Call

Do you want to also delete this appointment?

Yes   No
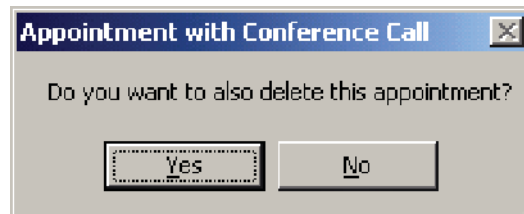
Note: If you choose "No," the canceled call will remain in your Calendar.

8. Make your selection and click **OK**.
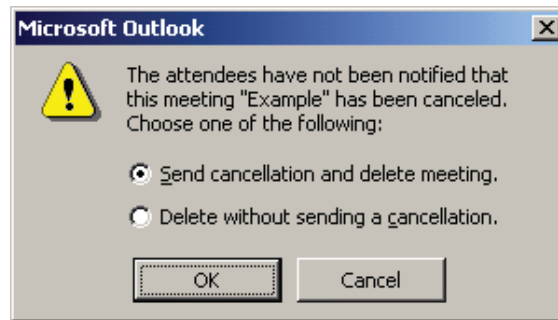
9. To send a notification to conference participants, type in your message and then click **Send**.

    Otherwise, if no attendees were previously invited, click Save and Close.

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