



# InterCall Online

## Guide for Owner Account Management



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You can view or update your Owner information, including product feature defaults at any time by selecting the **Manage My Account** section on InterCall Online.

### Manage My Account

#### SECURITY & PASSWORDS

[Change Your Password & Security Settings](#)

#### OWNER

[Owner Profile](#)

[Manage Delegates](#)

## 1. View/Edit Your Owner Information

To open your owner profile, choose **Owner Profile**.

The screenshot shows the 'View/Edit Owner Information' page for Alison Templeton. The page is divided into several sections:

- COMPANY AND BILLING ACCOUNT WHERE OWNER PROFILE IS TO BE ADDED:** Company Name: InterCall UK, Company Number: 14800, Account Name: InterCall UK, Account Number: 51036.
- OWNER INFORMATION:** Fields for First Name (Alison), Last Name (Templeton), Middle Initial, Position (Product Marketing Manager), Address 1 (Topeka House), Address 2 (Luther Challis Business Centre), Address 3, City (Barnwood, Gloucester), State/Province (Gloucester), Country (United Kingdom), ZIP/Postal Code (GL4 3HB), Telephone (01452581004), Alternate Telephone, Email (testdoc@intercall.com), and Fax.
- ASSISTANT INFORMATION:** A checkbox for 'Same as Owner's address'.
- PAC CODE:** PAC Label (EMEAMarketing).
- MARKETING SETTINGS:** Includes a note that default settings will be used if no selection is made. Options include: Mail Welcome Packets (Yes/No), Email Welcome Info (Yes/No), Email System Messages (Yes/No), Marketing Messages & Promotions (Yes/No), Protect From Reset (Yes/No), Copy Assistant (checkbox), Language Preference (English), and Email Address Change Notification (Yes/No).
- ALTERNATE RECIPIENT FOR MARKETING MATERIALS:** A checkbox for 'Same as Owner's address'.

Buttons for 'View Product details' and 'Save Changes' are located at the bottom right of the form.

This screen provides your Owner profile information including name, contact details and default PAC (Project Accounting Code). To change any of this information, simply update the appropriate fields, scroll to the bottom of the screen and click **Save Changes**. You will be asked to confirm your owner profile details. If the information is correct, click **Continue** to save your changes to our system. It is important you click **Continue**, otherwise your changes will not be saved.

## 2. View/Edit Product Details

To view or edit the product options and settings that are enabled on your profile, click the **View Product details** button at the bottom of the owner profile screen.

The product details page summarises all the features available to you as an owner and allows you to customise your preferences for your conferencing services. A description of the options available for the Reservationless-Plus & Automated services is provided at the end of this guide.

The first section on the page shows the call types or services available with your account. Click on **View All [service name] Numbers** to see the dial-in numbers associated with that service.

**View/Edit Owner Information for Alison Templeton**

*i* Click **Save Changes** to store your changes

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**CALL TYPE**

<input checked="" type="checkbox"/> Operator Assisted <a href="#">View All Operator Assisted Numbers</a>	<input checked="" type="checkbox"/> Reservationless-Plus <a href="#">View All Reservationless-Plus Numbers</a>	<input checked="" type="checkbox"/> Automated <a href="#">View All Automated Numbers</a>
	<input type="checkbox"/> Reservationless-Express	

When you check the Reservationless-Plus or Automated box a new section will appear allowing you to set default call options. The screenshot below shows the options for a Reservationless-Plus service including the conferencing code, Leader PIN (both of which can be changed at any time), and all the current settings for the service such as entry and exit announcements and auto-continuation (see appendix for full details). If you change any of these settings, they become the default for all your future calls.

**RESERVATIONLESS-PLUS**

Conference Code	<input type="text" value="123456"/>	<i>i</i>
Leader PIN	<input type="text" value="123456"/>	<i>i</i>
Allow Leader Dial Out to Participants	<input type="text" value="ON"/>	
Entry Mode	<input type="text" value="Entry Tone"/>	
Exit Mode	<input type="text" value="Exit Tone"/>	
Security Passcode - an extra code for your call	<input type="text" value="ON"/>	<i>i</i>
Quick Start	<input type="text" value="OFF"/>	<i>i</i>
Auto Continuation - continue call after Leader disconnects	<input type="text" value="ON"/>	
PAC via telephone keypad	<input type="text" value="OFF"/>	
Conference Record	<input type="text" value="ON"/>	
Continuation	<input type="text" value="ON"/>	
Allow Multiple Leaders	<input type="text" value="OFF"/>	

The final product section on the page lists the web conferencing services available to you. Please note: This is on a Pence Per Minute basis so do not select these if you are on a license arrangement for the service.

**WEB CONFERENCING**

[Click Here](#) for Video Conferencing

<input type="checkbox"/> Mshow	<input type="text" value="Please Select"/>
<input type="checkbox"/> Live Meeting	
<input type="checkbox"/> MeetingCentre	
<input type="checkbox"/> InterCall Web Meeting	

When the settings are updated as you like, choose **Save Changes**, verify the changes are correct and then click **Continue** to save the changes permanently. It is important you click **Continue**, otherwise your changes will not be saved.

### 3. Change Your Password & Security Settings

To select a new password for the site or to change your secret question and answer, click **Change Your Password & Security Settings** when accessing **Manage My Account**.

> Manage My Account > Change Password and Secret Question

i

Change Password and Security Options

\* Current Password \*Required Fields

**CHANGE PASSWORD**

New Password i

Confirm Password

**CHANGE SECRET QUESTION AND ANSWER**

Current Secret Question      Who is your conferencing service provider?

New Secret Question

New Answer

Confirm New Answer

To change your password, enter your current password and the new password that you would like to apply to your InterCall Online account. Then click **Save Changes**.

The same screen will also allow you to change your secret question and answer that is stored in case you are locked out of your InterCall Online account after attempting to use the wrong password. Remember to click **Save Changes** to store the updates.

### 4. Manage Delegates

The Manage Delegates page allows you to add, edit or delete delegates who have access to your InterCall Online account. If you give someone delegation rights, they will be able to schedule calls, start calls, access your library of stored material or manage your account on your behalf.

> Manage My Account > Manage Delegates

i Name Search  
 Please use the search function to find the Delegate that you would like to view/edit.  
 Search results will be displayed below.

Search For Owner

First Name

Last Name

OR

User Name

Delegates List

First Name	Last Name	User Name	My Meetings	My Library	Owner Profile	Expiration Date
<input type="checkbox"/>	Alison	Templeton	Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

All delegates that have already been selected are listed on the page including each delegate's role assignment and expiration date. By selecting the checkbox beside a delegate's name, you may:

- + select or deselect role management
- + delete selected delegates
- + change expiration date for all selected delegates.

If you would like to add a new delegate, input either their first name, last name or portal user name and then select **Search**.



You will be provided with a list of available users from within your company. Highlight the user you want to select and click **Add Selected User to Delegate List**.

Choose the roles for that user (My Meetings, My Library, Owner Profile) by selecting the checkbox in the appropriate column and then click **Submit** to save.

<input type="checkbox"/>	First Name	Last Name	User Name	<input type="checkbox"/> My Meetings	<input type="checkbox"/> My Library	<input type="checkbox"/> Owner Profile	Expiration Date
<input type="checkbox"/>	Alison	Templeton	Monday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Alison	Templeton	Tuesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

## Appendix: Product Option Descriptions

### A. AUTOMATED

**Leader Passcode:** The unique code entered by the Leader to start the call.

**Participant Passcode:** The code entered by participants to start the call.

**Entry Mode:** Select how you want participants joining a call to be announced – by a tone, name announce, silence or tone and name.

**Exit Mode:** Select how you want participants disconnecting from a call to be announced - by a tone, name announce, silence or tone and name.

### B. RESERVATIONLESS-PLUS OPTIONS

**Conference Code:** The unique passcode the Leader provides participants so they may enter the conference. You may provide a custom passcode in this field, or leave it blank and the Conference Passcode will default to phone number on the owner's profile.

**Leader Pin:** This is the code the Leader provides via the phone keypad to initiate their Reservationless-Plus conference. You may provide a custom Leader Pin, or leave the field blank and the system will assign a random code.

**Allow Leader Dial Out to Participants:** Select ON or OFF to determine whether or not participants can be dialled out to via the Web Moderator or if dial-in is the only option.

**Entry Mode:** Select how you want a participant being added to a call to be announced – by a tone, name announce, silence or tone and name.

**Exit Mode:** Select how you want a participant who disconnects from a call to be announced – by a tone, name announce, silence or tone and name.

**Security Passcode:** This is an additional level of security that requires participants to provide an additional code via telephone keypad before entering a Reservationless-Plus call. This option can be turned ON or OFF. Note: this feature must be OFF if Quick Start is enabled.

**Quick Start:** This allows the conference to start before the Leader joins. This option can be turned ON or OFF. Note: this feature must be OFF if Security Passcode is enabled.

**Auto Continuation:** This feature allows a Reservationless-Plus conference to continue if the Leader disconnects. This option can be turned ON or OFF.

**PAC via telephone keypad:** When enabled, this feature prompts the Leader of a Reservationless-Plus conference to enter a Project Accounting Code via the telephone keypad prior to being placed into conference. This option can be turned ON or OFF.

**Conference Record:** Allows the Leader of a Reservationless-Plus conference to have the conference recorded by pressing the \*2 keypad command. This option can be turned ON or OFF.



**Continuation:** This feature enables the Leader to use DTMF tones during a call to allow the conference to continue if they disconnect. This option can be turned ON or OFF.

**Allow Multiple Leaders:** This feature allows pre-selected participants to have access to the Leader keypad commands. This option can be turned ON or OFF.