Conference America Client Corner For Outlook 2007

v1.3.3

User Manual

Version 1.0

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Conference America, Inc.
7079 University Ct.
Montgomery, AL 36117

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1. Introduction

"Client Corner" is a web portal for various web applications and services provided by Conference America. "Conference America Client Corner 2007" is a Microsoft Office Outlook 2007 add-in for easy access to the Conference America Client Corner.

Users log into Client Corner once and have full access to Client Corner, plus the integrated experience with Microsoft Office Outlook 2007.
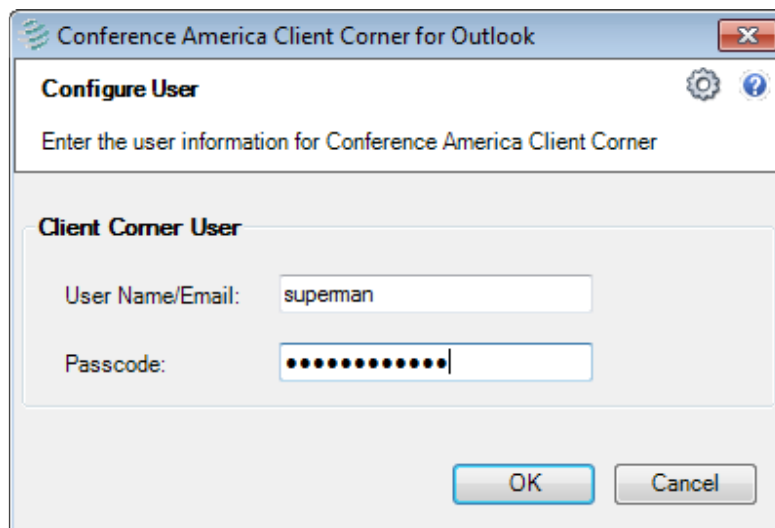
This document serves as a how-to instruction manual for new users.

2. Log Into Client Corner

After installing the application and re-starting Outlook, you need to click the "**Configure Conference America Client Corner for Outlook**" button on the "**Conference America**" toolbar in the Outlook main window:
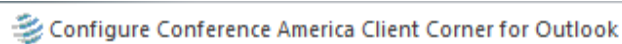
In the "Configure User" dialog window, enter your Client Corner user information. Please contact us if you do not have the information or need any help regarding the information. Click "**OK**."

3. Access Client Corner

After successfully logging into Client Corner, you should see the "Client Corner" toolbar. It displays all the available Client Corner applications under your login:

If you make any changes to the applications, you can stay up-to-date by clicking either refresh or change user.

You can then access Client Corner applications simply by clicking the application buttons in the toolbar. Your default browser will launch the selected Client Corner web application as you automatically log in.

If you have more than one account under the same application, you can choose which account to use by clicking the application button and selecting the account in the dropdown list:
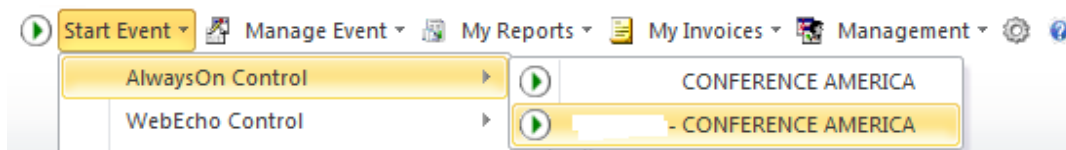
3.1 Start "AlwaysOn" (unattended) Event

(You may not have this feature based on your Client Corner user)

You can start an "AlwaysOn" event by clicking the "**Start Event**" button in the Client Corner toolbar. By default, an invitation email will be drafted and displayed to you when you start a new event as illustrated below.

Please note that "Meeting Control" is for attended events and is not applicable to AlwaysOn.

Immediately after you send the invitation email, your default browser will launch the according Client Corner application for the event. If you discard or only save the email as a draft, the event will NOT be started through the according Client Corner application.

You have more granular controls to send an invitation email before starting a new event. See application options for more information.

3.2 Schedule "AlwaysOn" (unattended) Event

(You may not have this feature based on your Client Corner user)

You can schedule "AlwaysOn" (unattended) events by clicking either of the following two:

- "**Schedule AlwaysOn Event,**" for audio only event
- "**Schedule WebEcho And AlwaysOn Event,**" for both web and audio events from the "**Manage Event**" group of the Client Corner toolbar. An Outlook meeting request will be drafted and displayed to you as illustrated below:


The body content of this Outlook meeting request form only contains event Participant join information and will be visible to everyone who receives this meeting request, so it is a good idea to omit any event Leader join information.

A portion at the bottom of this Outlook meeting request form contains event join information for both the event Leader and the event Participant. This portion of content is only visible to the user and is read-only. Tip: you can **right click** in this portion and select "**Copy All**" to get a copy of its content or select "**Print**" to print its content.

After selecting desired event Participants for the "**To...**" field, you can click "**Send**" to send out this meeting request and save it into your Outlook calendar, just like sending any other Outlook meeting requests. By default, before the meeting request is sent, this scheduling event will be automatically added into "My Events," which is strongly recommended. Meanwhile, you have more granular controls to automatically add, allowing you to schedule the event into "My Events." See application options for more

information. You also can manually add this scheduling event into "My Events" by clicking the "**Add To My Events**" button in the "Client Corner" group of the ribbon.

Once the event is added into "My Events," manually or automatically, you will see "**Manage Reminders**", "**View In My Events**" and "**Sync With My Events**" buttons in the "Client Corner" group of the ribbon as illustrated below:
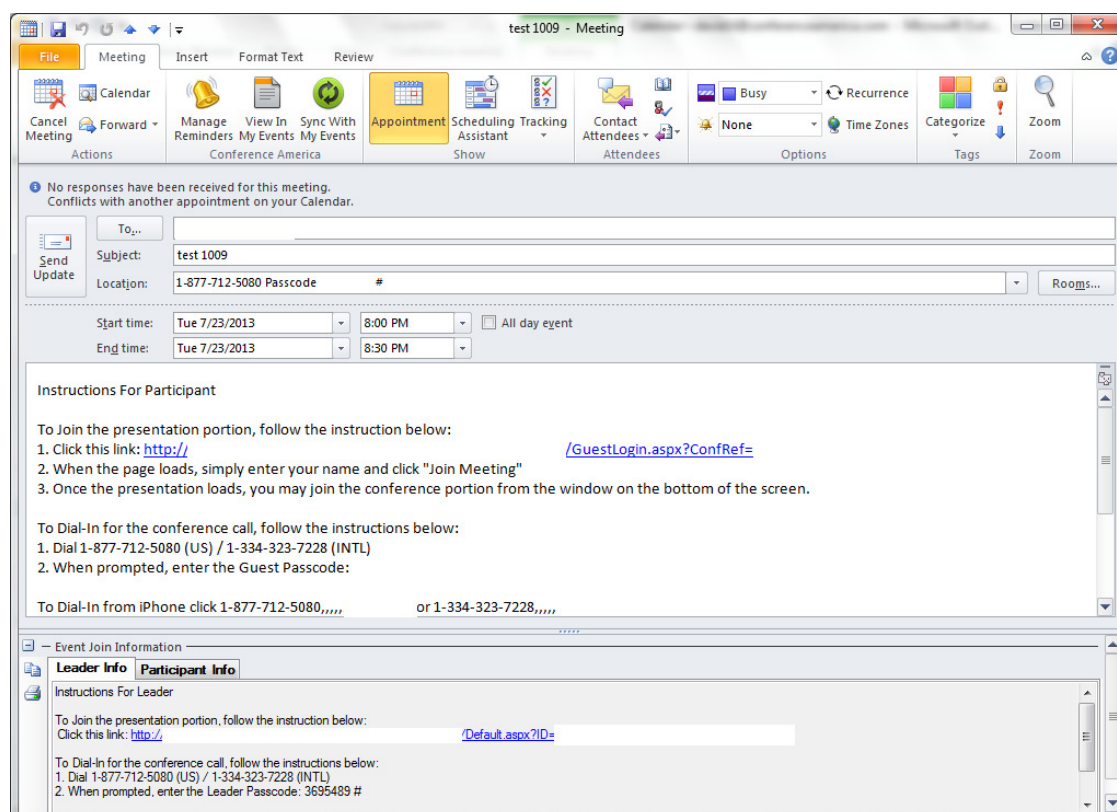

You can click "**View In My Events**" to open the event inside "My Events" web application. Then you can manage the event with more details and choices inside "My Events."

If you click the "**Delete**" button, the event will be deleted from your Outlook calendar and "My Events" as well. This deletion cannot be undone.

By default, before the meeting request update is sent, this scheduled event will be automatically synchronized with "My Events," which is strongly recommended. Meanwhile, you have more granular controls, allowing you to automatically synchronize scheduled events with "My Events." See application options for more information.

You can also manually synchronize scheduled events with "My Events" by clicking the "**Sync With My Events**" button in the "Client Corner" group of the ribbon as illustrated below:
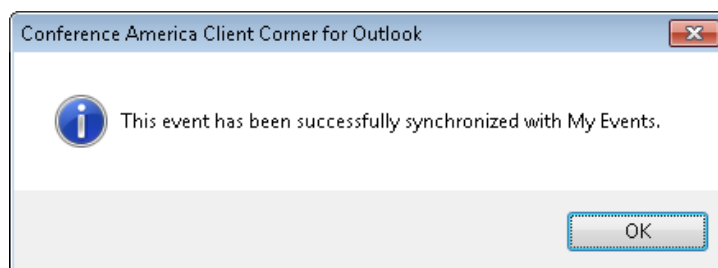
Here are the rules of synchronization between your Outlook and My Events:

- Event join information, including dial-in number, passcode, and web URL, etc. will **always** be loaded from "My Events."
- Event scheduling information, including subject, date & time, and time-zone, will be automatically merged between Outlook and "My Events" for the same event. See the application options for more details.

You can click "**Manage Reminders**" to set your reminders for this event as illustrated below. You would need to click "**OK**" to save the changes or "**Cancel**" to make no change. By default this dialog will show up every time when you successfully schedule an event which is also added into My Events. Meanwhile, you can choose not to set the reminders when you schedule an event. See application options for more information.
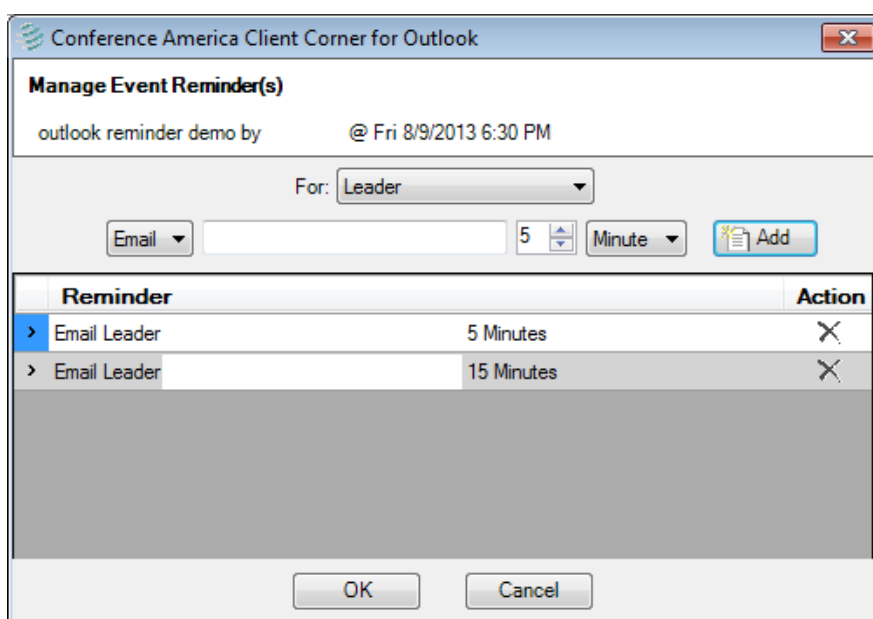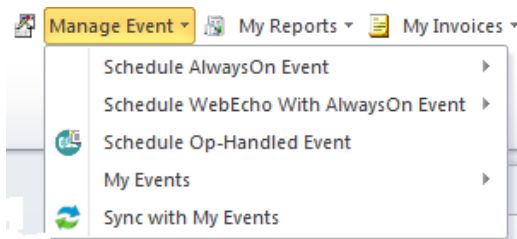

3.3 Manage Events

(You may not have this feature based on your Client Corner user)

Click "**My Events**" to launch the Client Corner web application, "My Events," from your default browser, and you can manage all your events from there.
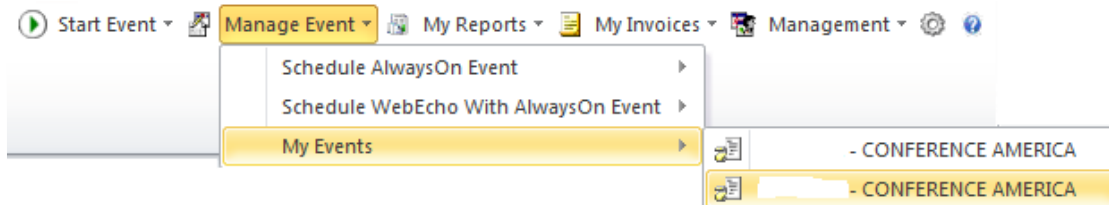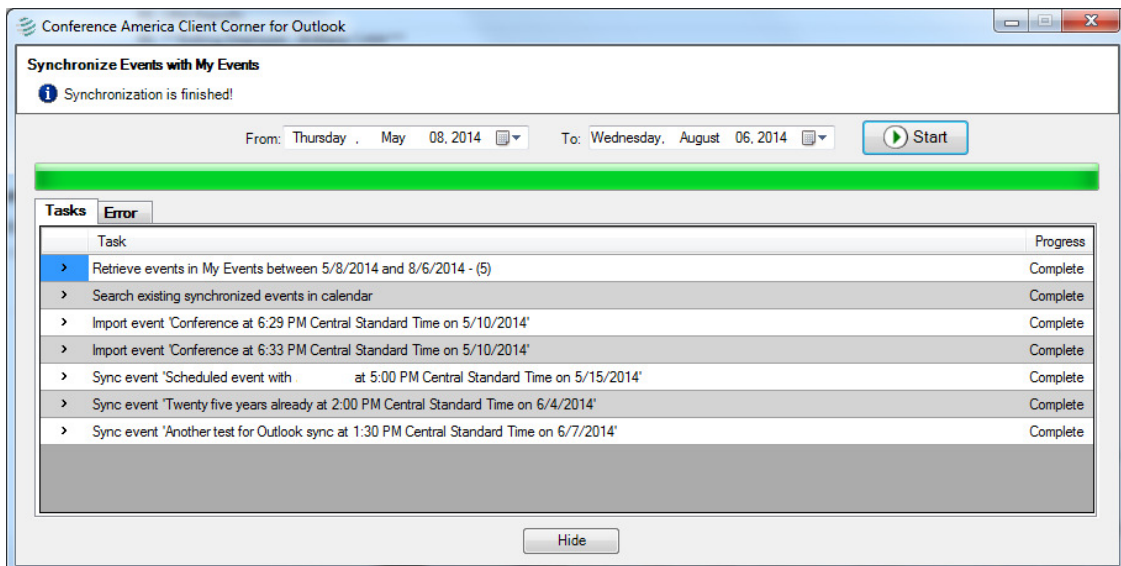

3.4 Events Synchronization

(You may not have this feature based on your Client Corner user)

Click "**Sync With My Events**" to launch the form for events synchronization. Please note that this menu item is only available when "Sync with My Events When Send Meeting Request" option is turned on.
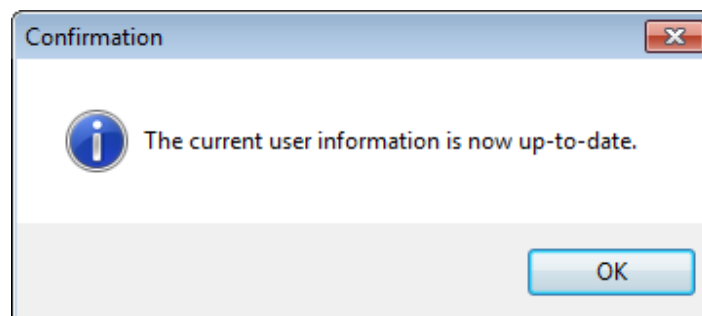
4. Configure Client Corner User

To configure logged in Client Corner user, click the "**Configure**" ⚙ button from "Client Corner" toolbar in Outlook main window:
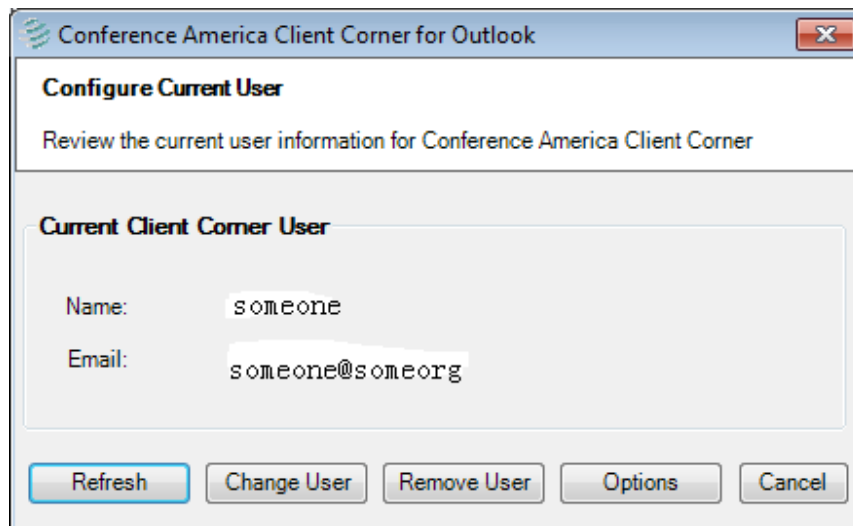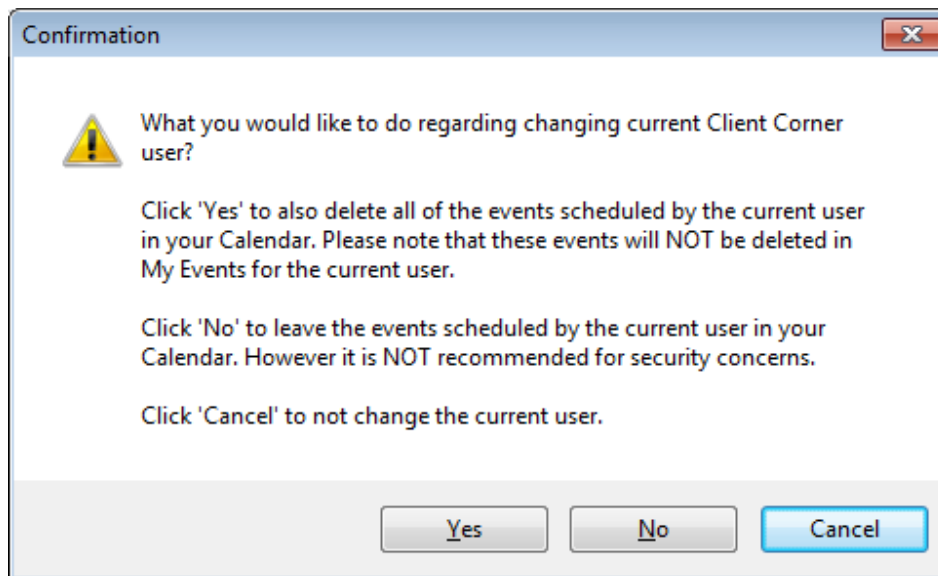
4.1 Refresh Client Corner Applications

Click the "**Refresh**" button to reload all the available Client Corner applications under your user. You should see dialog informing you that your user information has been successfully updated as illustrated below:
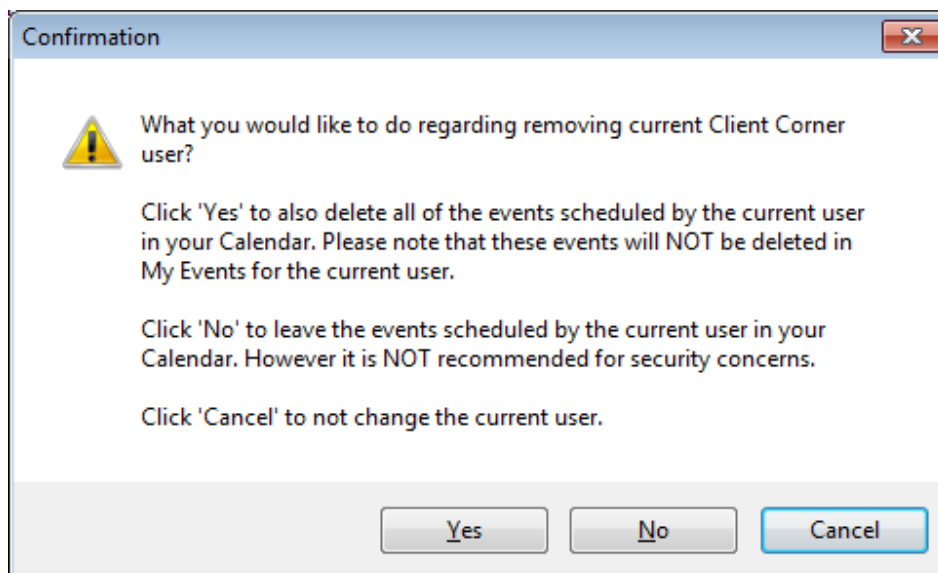
4.2 Change User

Click the "**Change User**" button and follow the screen instructions to log in as another Client Corner user.
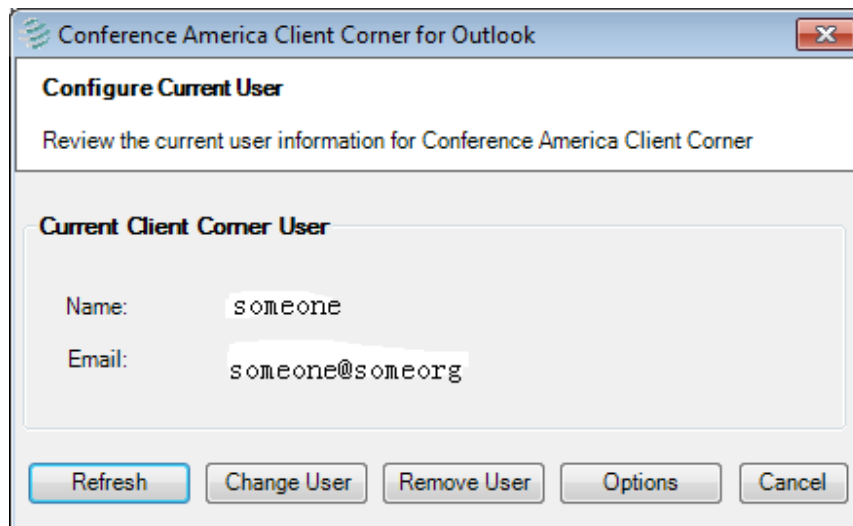

4.3 Remove User

Click the "**Remove User**" button and follow the screen instructions to log out the current user from Client Corner.
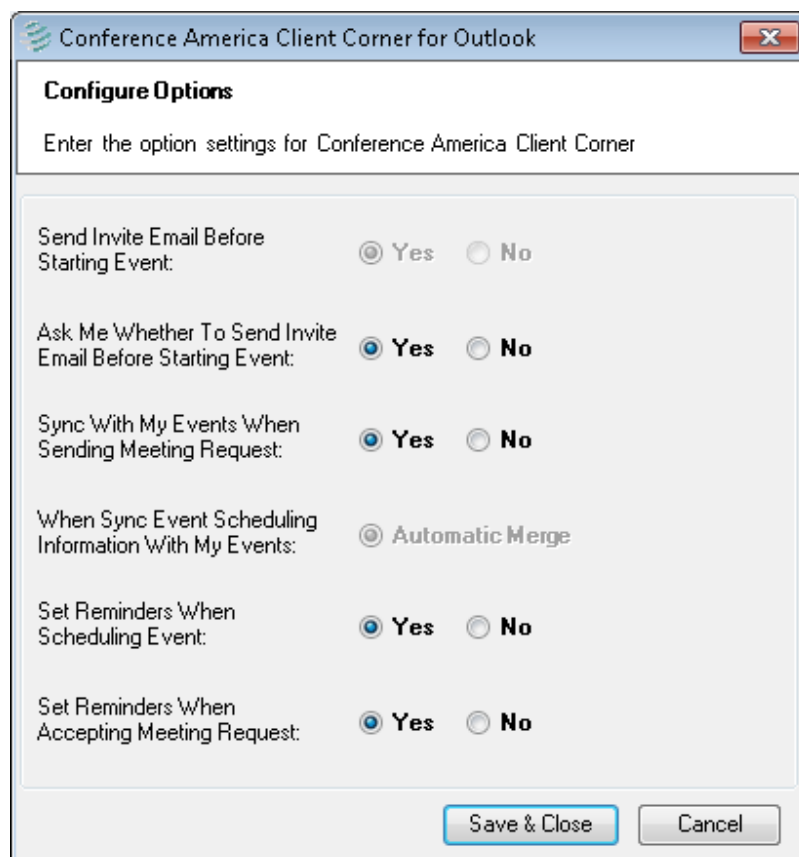
5. Application Options

To open application options, click the "**Configure**" ⚙ button from "Client Corner" toolbar in the Outlook main window:

Then click the "**Options**" button to open the "Configure Options" form:

Click "**Save & Close**" to save changes and close the "Configure Options" form. Or click "**Cancel**" to not make any change to the options.

5.1 Invitation Email Before Start Event

Set "**Send Invite Email Before Start Event**" as "**Yes**": an invitation email will be drafted and displayed before you start a new "AlwaysOn" (unattended) event.

Set "**Send Invite Email Before Start Event**" as "**No**": you start a new "AlwaysOn" (unattended) event through the according application without sending an invitation email.

If "**Ask Me Whether To Send Invite Email Before Start Event**" is set as "**Yes**," you will get a question dialog as illustrated below. The setting of "**Send Invite Email Before Start Event**" will be ignored.
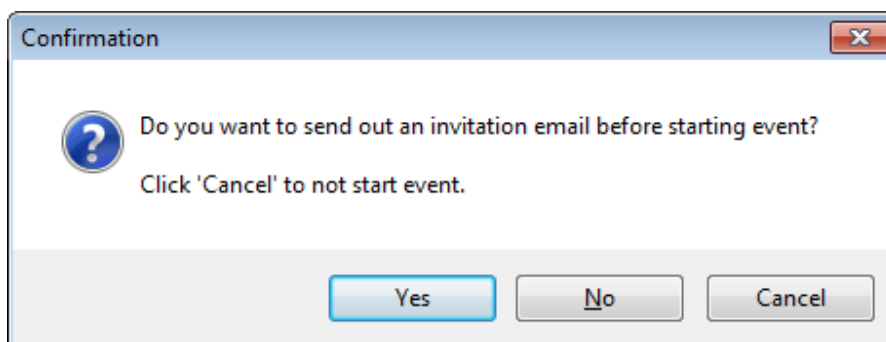
5.2 Synchronize Event with My Events

Set "**Sync with My Events When Send Meeting Request**" as "**Yes**": the event will be added or synchronized with "My Events." See the schedule event for details.

Set " **Sync with My Events When Send Meeting Request** " as "**No**": the event will only be saved in your Outlook calendar.

The "**When Sync Event Scheduling Information With My Events**" option is always set as "**Automatic Merge**". The event scheduling information will be merged automatically between Outlook and My Events. See the schedule event for details.

6. Check Application Update

To check for updates for this application, click the "**About**" ⊙ button from the "Client Corner" toolbar in the Outlook main window:
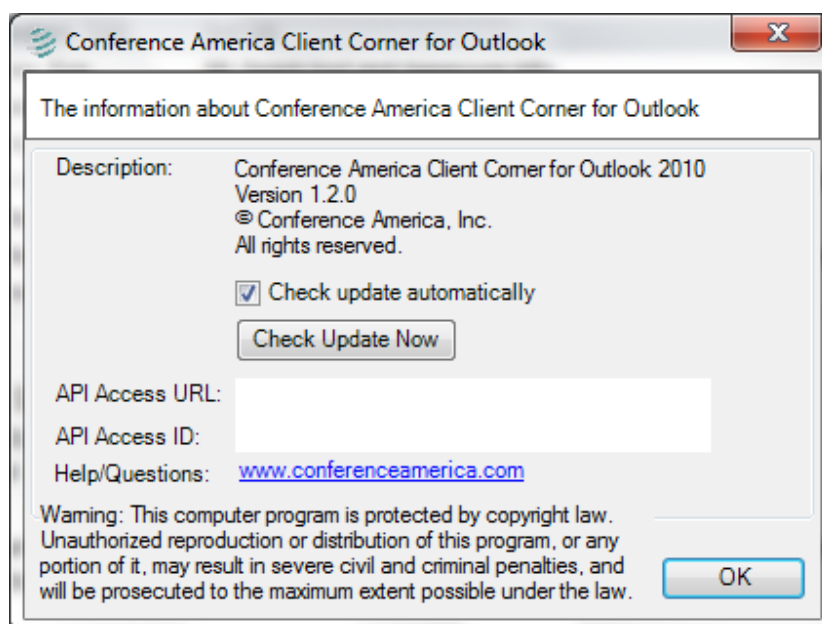
Click the "**Check Update Now**" button to check whether there is any newer version of this application. By default the application will check the update automatically and notify you if a newer version is found. You can use "**Check update automatically**" checkbox to toggle the setting.

If a newer version is found, you should see the form illustrated below. You can then click Details and Download links to get the newer version.
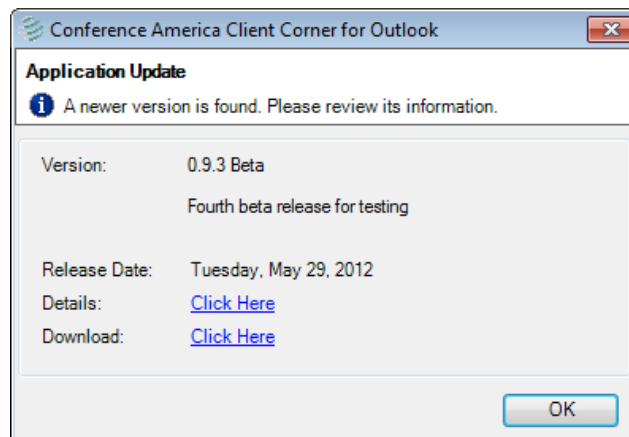
If you are using the latest version of the application, you should see the form illustrated below. No further action is needed at this point.