PhoneTree®

2100, 2500, 3500
User Guide

Version 6

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Introduction

Introduction

Welcome!

Thank you for choosing PhoneTree to deliver your important messages! This guide has been designed to take you step-by-step through the basic required setup of your PhoneTree system, including the pre-configuration steps necessary to complete before calls can take place, as well as daily operation and common questions. For further information on certain features that are not discussed in this guide, you can search the help files located within the PhoneTree software or visit our website at **www.phonetree.com**.

We are always improving our product and support materials. For the latest updates for this **User Guide**, please visit **www.phonetree.com/customersupport/downloads.htm**.

Contacting Us

We're here to help if you ever have questions. Keep the following contact information handy and let us know anytime you have a question, comment or concern.

Toll-Free Customer Support 866.234.2943
Fax 800.245.4221
E-Mail . . . . .support@phonetree.com
USPS . . . . .PhoneTree
                                                 2400 Reynolda Rd
                                                 Winston-Salem, NC 27106

Notice of Liability

The information in this book is intended to be accurate and useful with the operation of your PhoneTree. Personal Communication Systems, Inc. shall not have any liability for loss or damage caused by directly or indirectly using the instructions contained within this book or by the computer software and hardware products described in it.

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Installation

Step One: Check System Requirements

PhoneTree requires a minimum set of requirements from your system in order to work correctly. If your PC has fewer than these requirements, your PhoneTree system may not complete certain tasks well or at all.
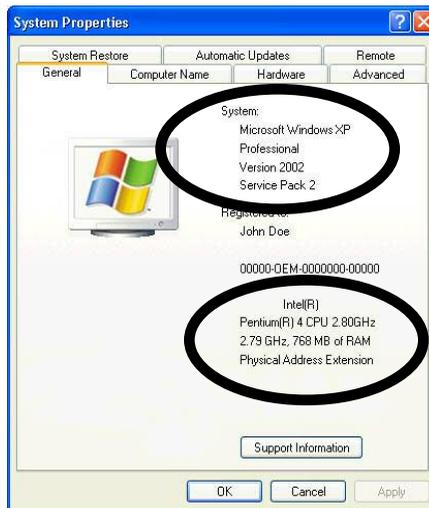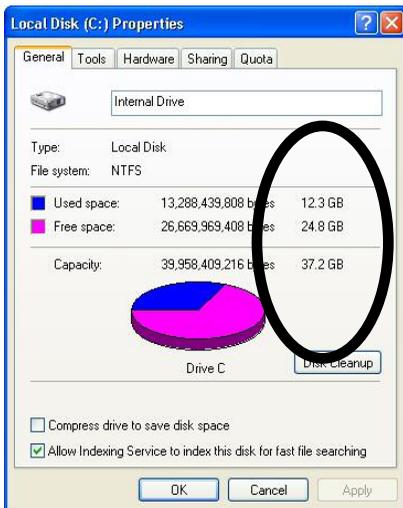
System Requirements (Minimum)

- Intel Pentium 4 or equivalent processor

- Windows 2000, Windows XP, Windows Server 2003, or Windows Vista
  PhoneTree is not compatible with Windows 3.1, Windows 95, Windows 98, Windows ME, Windows NT, or Mac OS.

- RAM: 2000 . . . . 512 MB
  XP . . . . 512 MB
  Server 2003 . . . . . 512 MB
  Vista . . . . 1 GB

- Hard Drive Space: 1 GB

- CD ROM Drive

- Color Monitor (SVGA) with 1024 x 768 resolution

- One USB port per unit.

  Note: If you do not have any available USB ports, you will need to purchase a new host controller card. There is a max of 12 lines (3 PT-400 units or 6 G2PT units) *per* host controller card *(true dual [or quad]).* For more information, please contact Customer Support.

In addition to the above requirements, the computer hosting PhoneTree must be:

- Configured and installed on the client network.

- Able to access the Internet for initial configuration, to receive online training and in case of any future technical support needs from PhoneTree Customer Support.

Note: PhoneTree is designed to allow operation in the background however, *we cannot guarantee compatibility or problem-free operation with other programs.*
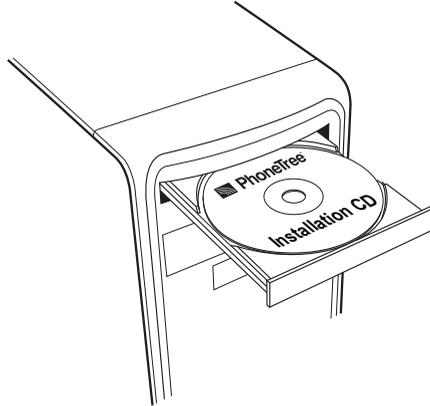
Step Two: Install the Software

Note to Windows Vista users: User Account Control (UAC) must be disabled before you can install the PhoneTree software. Please see the **Installing PhoneTree on Windows Vista** insert that was included with your package or visit **www.phonetree.com/customersupport** for instructions on how to do this.

1. **Insert the CD**

   Insert the **PhoneTree Installation CD** into your CD-ROM drive. The Installer Menu should start automatically. Choose **Install PhoneTree Software** and enter the supplied **Serial Key** (found on the inside of the software case) when prompted. If it does not start automatically, click on Start ▸ Run ▸ Browse... ▸ Installer.exe (look for this file on the CD) ▸ click Open ▸ click **OK**. The Installer Menu should then launch.

   To install **Adobe Reader**, relaunch the Installer Menu. If you plan to use the **PhoneTree Client** software for limited remote access of your PhoneTree system from a networked PC (see page 131), launch the Installer Menu from that PC.

2. **Choose the Default Settings**

   Click on **Next** several times until the installation process starts. In order to assure reliable operation and ease of service, please DO NOT change the default installation information as it is presented.
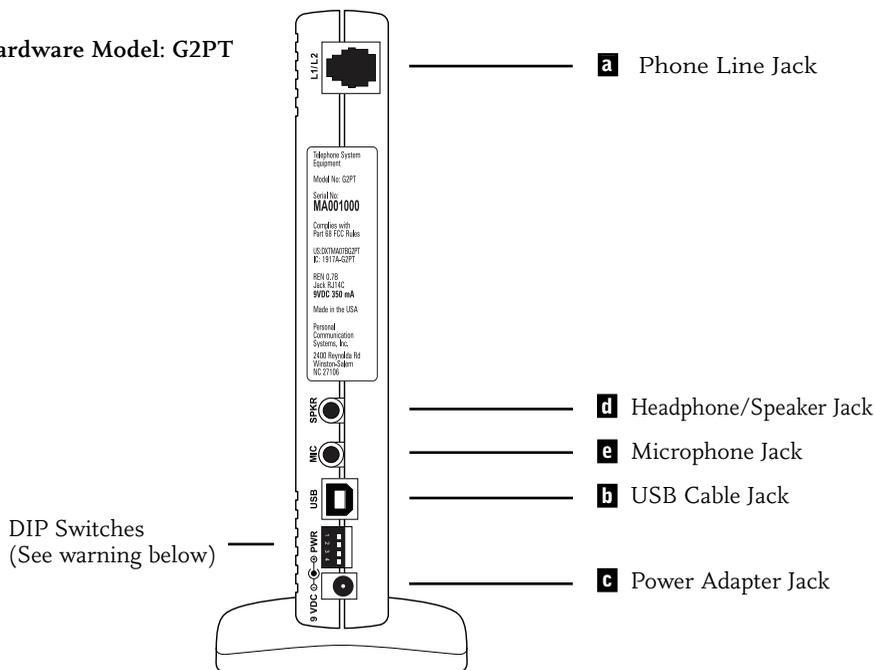
3. **Finish Installation**

   If asked, choose "Yes, I want to restart my computer now" and click **Finish**. Do not start the PhoneTree program at this time.

4. **Install Female and Male Voice Text-to-Speech (3500 only)**

   Repeat this process for *both* the **Female** and **Male Voice CDs**.

Installation: Connect the Hardware

Hardware Model: G2PT

		a Phone Line Jack
		d Headphone/Speaker Jack
		e Microphone Jack
		b USB Cable Jack
DIP Switches (See warning below)		**c** Power Adapter Jack

Telephone System Equipment
Model No: G2PT
Serial No:
MA001000
Complies with
Part 68 FCC Rules
US:DXTMA07BG2PT
IC: 1917A-G2PT
REN 0.7B
Jack RJ14C
9VDC 350 mA
Made in the USA
Personal
Communication
Systems, Inc.
2400 Reynolda Rd
Winston-Salem
NC 27106

Step Three: Connect the Hardware

G2PT

1. Connect the phone cable

The G2PT's single phone jack design (**a**) has the ability to be configured for 1 or 2 Line capacity. Please see page 14 for instructions on how to connect to various wall jack configurations.

2. Connect the USB cable

Using the supplied USB cable, connect the flat end to an available USB port on your PC and the square end to the PhoneTree's USB cable jack (**b**). A USB cable is required for each PhoneTree hardware box (*if all of your USB ports are in use, see page 8*).

3. Connect the power adapter

Connect the supplied power adapter to the PhoneTree's power adapter jack (**c**) and then insert it into a wall power outlet or power strip.

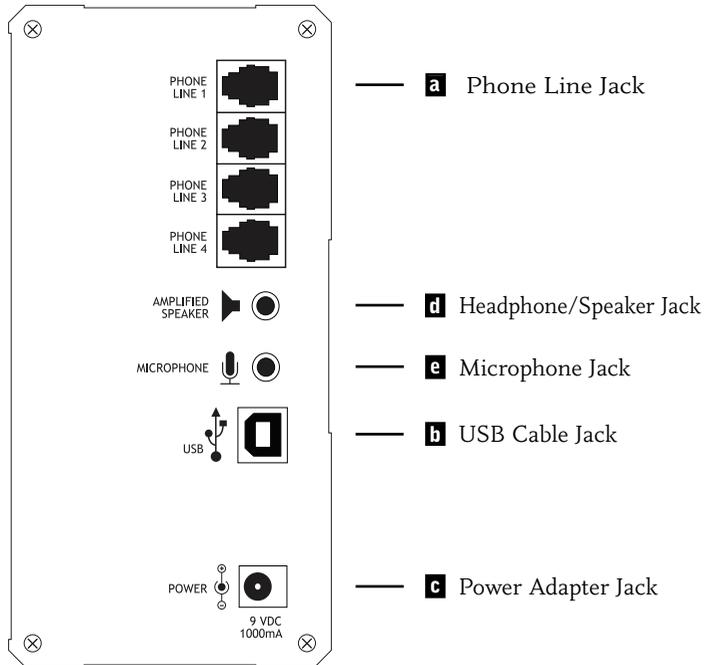**4. Connect the headset microphone**

Using the supplied headset microphone, connect the Headphone plug, or a set of computer speakers, into the SPKR jack (**d**). Next, connect the Microphone plug into the MIC jack (**e**), located right below the SPKR jack. **Note:** If using more than one unit, make sure that the headset microphone or speaker set, is connected to the unit that contains lines 1-2.

Caution! (DIP Switches)

The DIP (Dual In-Line Package) Switches are pre-configured from PCS and should only be adjusted if there is an installation problem as described on page 18. For information on how to properly set the DIP Switches, please see page 166.

Hardware Model: PT-400

PHONE LINE 1 — **a** Phone Line Jack

PHONE LINE 2

PHONE LINE 3

PHONE LINE 4

AMPLIFIED SPEAKER — **d** Headphone/Speaker Jack

MICROPHONE — **e** Microphone Jack

USB — **b** USB Cable Jack

POWER — **c** Power Adapter Jack

9 VDC 1000mA

PT-400

1. Connect the phone cable

Connect an analog phone cable to each enabled phone jack. Depending on the number of lines you ordered for your PhoneTree hardware, all phone jacks on the back of each PT-400 unit may not be enabled.

2. Connect the USB cable

Using the supplied USB cable, connect the flat end to an available USB port on your PC and the square end to the PhoneTree's USB cable jack (**b**). A USB cable is required for each PhoneTree hardware box (*if all of your USB ports are in use, see page 8*).

3. Connect the power adapter

Connect the supplied power adapter to the PhoneTree's power adapter jack (**c**) and then insert it into a wall power outlet or power strip.

4. Connect the headset microphone

Using the supplied headset microphone, connect the Headphone plug, or a set of computer speakers, into the Speaker jack (**d**). Next, connect the Microphone plug into the Microphone jack (**e**), located just below the Speaker jack.

Note: If using more than one unit, make sure that the headset microphone or speaker set, is connected to the unit that contains lines 1-4.

Step Four: Install the Hardware Drivers

After the hardware steps on the previous page are completed, your computer may prompt you for permission to install the hardware drivers for Windows. Check with your IT personnel to make sure the Windows user login you plan to run PhoneTree with has the correct permissions associated with it. If the permissions are not set high enough, Windows will prevent you from moving further with the installation.

If you are running Windows XP, you will be required to install the drivers manually:

Windows XP (with Service Pack 2)

Choose **No**, **not this time** and click **Next**. Choose **Install the software automatically (Recommended)**, then click **Next**.

Next, you will be informed that the drivers have not passed Windows Logo testing. Be assured that it is 100% safe to install the PhoneTree drivers on your computer. Click **Continue Anyway** to proceed. Windows will prompt you to do this several times until the hardware is fully installed.

Note: If you accidentally pressed **STOP Installation**, unplug the power adapter from the PhoneTree box for about 10 seconds and then reinsert it. You should see Windows detect the hardware again and then just follow the steps listed above.
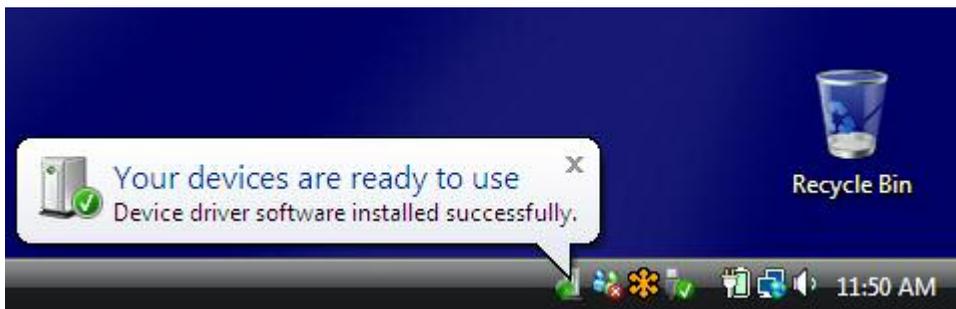
Windows Vista
You may receive the warning screen below. Be assured that it is 100% safe to install PhoneTree on your PC.

Please click **Install this driver software anyway**.

It may take a few minutes for Windows to recognize the PhoneTree device drivers. When you see the above message appear in the lower right corner of the screen, the PhoneTree hardware has been successfully installed.

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Step Five: Connect Analog Phone Cable

G2PT

The G2PT's single phone jack design allows it to be used for either a 1 or 2 line system. The number of PhoneTree lines you purchased will determine how many PhoneTree hardware units you have. For example, if you have ordered a 4-line PhoneTree system, you will have two PhoneTree units: one unit representing lines 1-2 and the other for lines 3-4. By using the supplied cables and adapter, each PhoneTree unit can be configured to work with most any analog wall jack. Using the examples below, choose the wall jack configuration that you will use and connect your analog phone cable(s) as instructed.

Note: These illustrations represent connections for *one* G2PT PhoneTree hardware unit. If you have more than one PhoneTree unit, you will need additional wall jacks enabled for each unit.

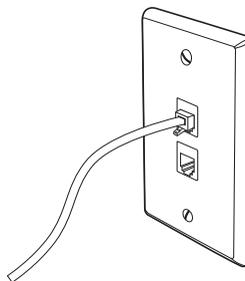**Single, Analog Wall Jack
(1-Line PhoneTree Unit)
or
Single, 2-Line Analog Wall Jack
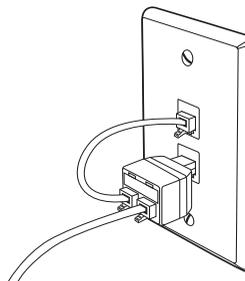(2-Line PhoneTree Unit)**
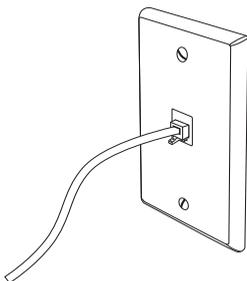
Connect PhoneTree to the wall jack using the 7-foot phone cable.

**Duplex Analog Wall Jack
(1-Line PhoneTree Unit)**

Connect PhoneTree to either wall jack using the 7-foot phone cable.

2-Wire Jack

4-Wire Jack

Duplex Adapter

The Duplex Adapter (included with each PhoneTree G2PT unit) has been specially wired for exclusive use with the Duplex Analog Wall Jack (2-Line) configuration. ***It will not serve as a standard splitter.*** This adapter is not found in stores and is only sold directly from PhoneTree (www.phonetree.com/shop).
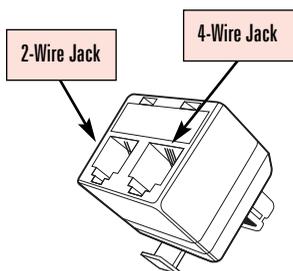
**Duplex Analog Wall Jack
(2-Line PhoneTree Unit)**

Connect PhoneTree to the 4-wire jack on the duplex adapter using the 7-foot phone cable.

Plug the adapter into either wall jack.

Using the 4-inch phone cable, connect the 2-wire jack on the duplex adapter to the remaining wall jack (see figure above).

PT-400

Unlike the G2PT model, each phone jack located on the back of the PT-400 (see page 11) represents one phone jack, or line card, inside the PhoneTree unit. The PT-400 does not require special phone jack configurations. An individual, analog wall jack is required for each phone line board installed inside the unit. Even though each PT-400 unit has four phone jacks, all may not be enabled.

Notes

Pre-Configuration Steps

Pre-Configuration

Before starting the PhoneTree software configurations, we recommend that the following steps are completed. These steps have been designed to help ensure that your PhoneTree operates at its fullest potential on your PC.

Step One: Verify Device Connection

Check to see if your PC recognizes your PhoneTree unit by doing the following:

a. Right-click the My Computer icon on your computer desktop and choose Properties.

b. Click on the Hardware tab and then the Device Manager button. Then scroll down to Universal Serial Bus controllers.

c. Click on the + sign next to its icon.
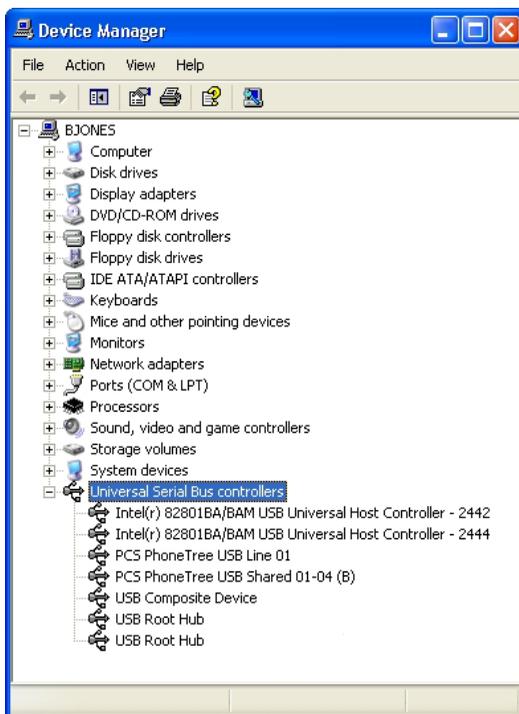
d. You should see the following devices (exact descriptions vary) at a minimum:

Host Controller

USB Root Hub

PCS PhoneTree USB Line 01 (if you do not see the correct number of installed lines AND if you have purchased more than 2 lines, follow the instructions in the **Troubleshooting**: **Checking DIP Switches** section on page 166).

Other devices may be present. Leave this window open in order to complete the next step.

Step Two: Disable Power Management

To manage power, Windows will attempt to disable USB functionality when a device is not used. As the default behavior, this often does not work correctly and may cause Windows to not properly recognize any USB device (including PhoneTree). Because the default power management setting often causes problems for PhoneTree and other USB devices and because you already have the Device Manager open, go ahead and change the setting by completing the following steps:

a. Under the the Universal Serial Bus Controllers branch, right-click a **USB Root Hub**, and then choose **Properties** (see picture at right).

b. Click the **Power Management** tab.

c. **De**-select the "Allow the computer to turn off this device to save power" check box (see picture at right).

d. Repeat Steps a-c for each USB Root Hub in your Device Manager.

e. Click **OK**, and close the Device Manager.

Step Three: Turn Off PC Hibernation

For Windows 2003 & XP:

The Windows hibernation or another power management function sometimes interferes with the operation of your PC when left idle, which can cause problems when using PhoneTree. To resolve this:

a. Right-click on a blank area of your desktop and choose **Properties**.

b. Click on the **Screen Saver** tab.

c. Disable your screen saver by choosing "**None**" from the drop-down, then click the Power button (see picture at right).

d. Once the **Power Options Properties** window opens, click on the **Power Schemes** tab. Make sure that the settings for your selected scheme include the **Never** setting for **Turn off monitor**, **Turn off hard disks** and **System standby** (see picture below right). Now click on the **Hibernate** tab.

e. Make sure the **Enable hibernation** option is NOT selected on this Hibernate tab. Click **OK**, then click **OK** on the **Display Properties** screen.
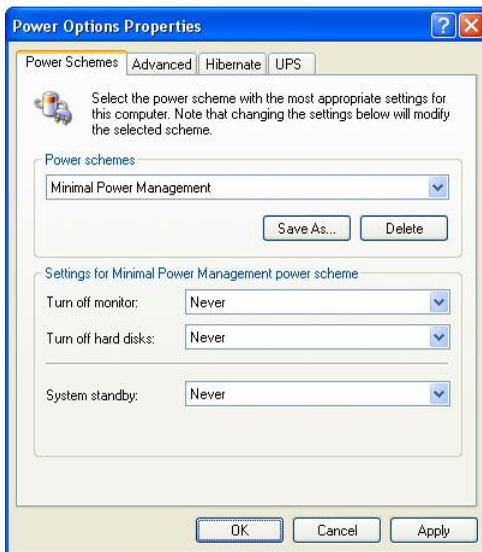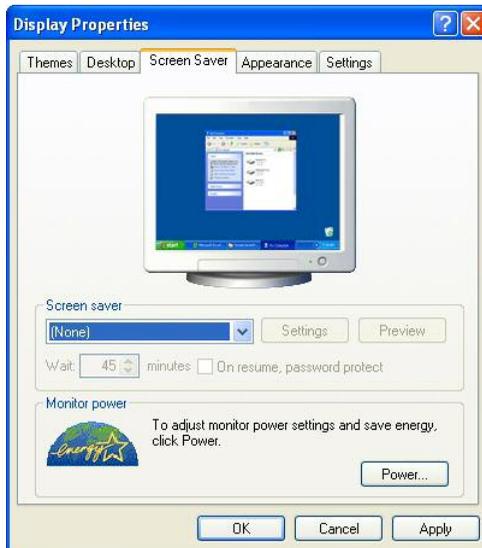
For Windows Vista:

a. Right-click on a blank area of your desktop and choose **Personalization**.

b. Click on the **Screen Saver** link.

c. Disable your screen saver by choosing **None** from the drop-down, then click on **Change power settings...**

d. On the **Power Options** tab, under **Select a power plan**, click **Change plan settings** for the current power plan you are using.

e. Once in the **Edit Plan Settings** tab, set drop-down boxes for **Turn off the display** _and_ **Put the computer to sleep** to **Never**. Next, click on **Change advanced power settings**.


f. From the list of advanced settings, click the + sign next to the following items:

Hard Disk: set **Turn off hard disk after** to 0 minutes. This will change the setting to Never.
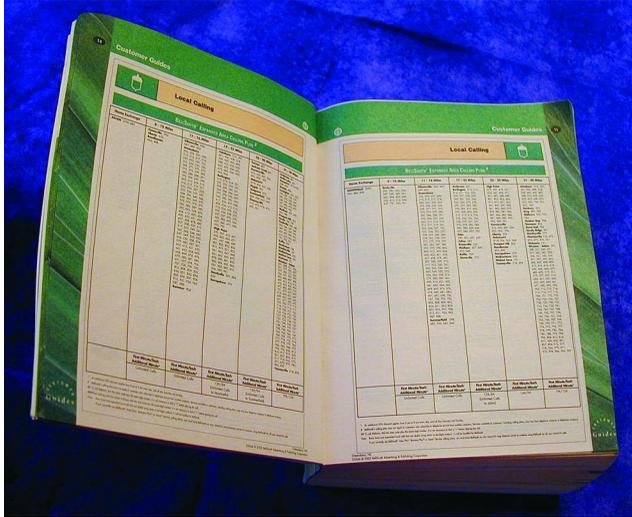
Sleep: set **Sleep after** and **Hibernate after** both to 0 minutes.

Display: set **Turn off display after** to 0 minutes and **Adaptive display** to Off.

When finished, click **Apply** and then **OK**. You will return to the Edit Plan Settings tab. Click **Save changes** to exit.
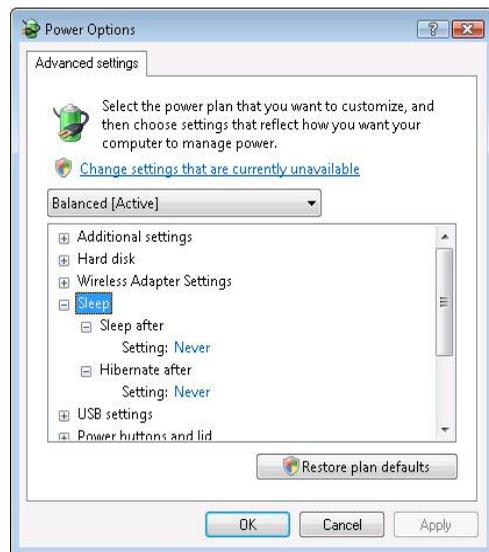
Step Four: Get a Copy of Your Phone Book

Because the dialing rules are set by independent phone companies, varying from location to location across the United States, and are continually being updated, you will need to tell PhoneTree how your numbers must be dialed. This is a one-time setup step that will not need to be repeated unless the dialing rules change for your location. The easiest way to get the dialing rules for your area is to get a copy of the phone book issued by your telephone service provider and have it ready when you complete the configuration steps on page 30. Your phone company may be able to provide a copy of your phone book if yours has been misplaced.
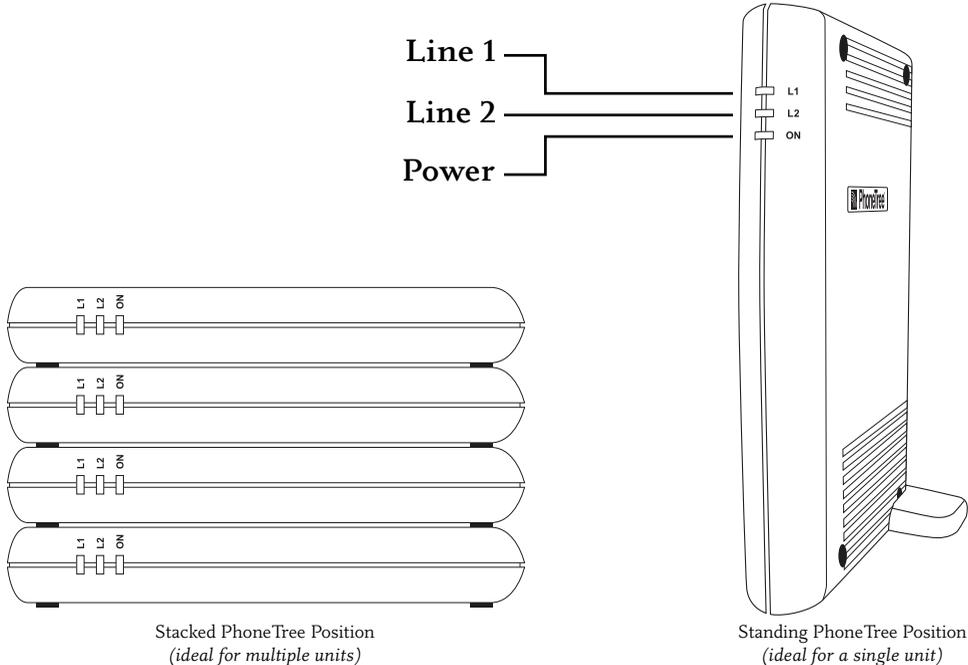
We have also found the following website helpful in determining local dialing rules, although no guarantees are made regarding the accuracy of the information: **www.localcallingguide.com**.

PhoneTree Hardware Functionality (While In Use):

G2PT

Your PhoneTree unit has been designed to stand upright or, if you have more than one unit, stacked on its side to save room.

While in operation, your PhoneTree will use the built in LEDs to display the activity. Below is a description for each LED and how it functions:
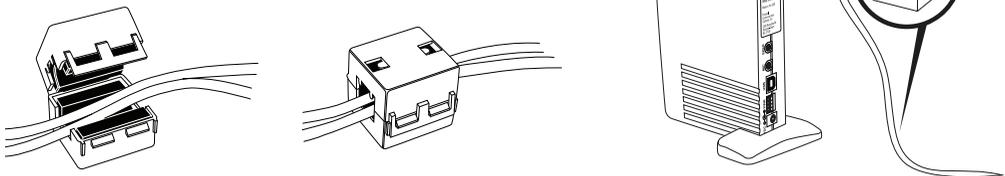
Line 1
Line 2
Power

L1
L2
ON

Stacked PhoneTree Position
(ideal for multiple units)

Standing PhoneTree Position
(ideal for a single unit)

L1 (Line 1): This **yellow** light illuminates only while your PhoneTree is making a call on Line 1 and briefly turns off while switching between calls.

L2 (Line 2): Corresponds to the second phone line (if enabled) and is otherwise the same as Line 1 in color and functionality.

ON (Power): This **green** light illuminates while your PhoneTree has power, regardless of whether it is making calls or not.

Interference

If your PhoneTree experiences radio interference while making calls, install a ferrite clip on the phone cable close to the PhoneTree's phone jack.

PT-400

Always make sure the green power light is on to be assured that your PhoneTree system is able to make calls. The speaker can be used to listen to any call activity for your line of choice or you can connect the headphones to listen to them privately. For more information about listening to calls and choosing which line to hear, please see page 84.
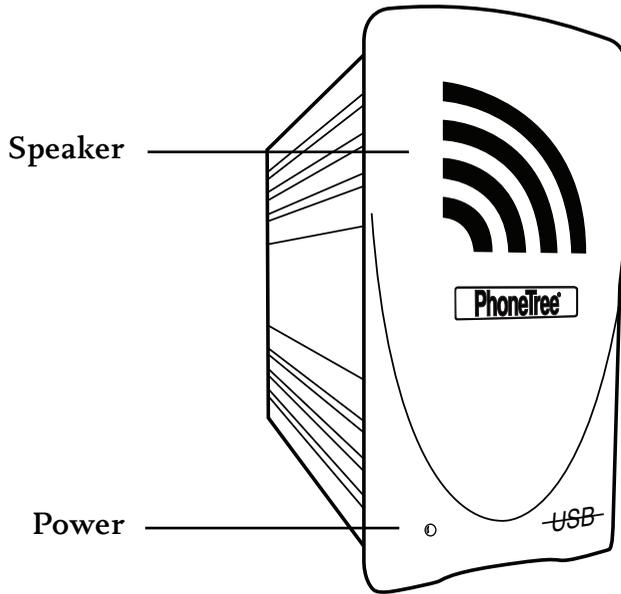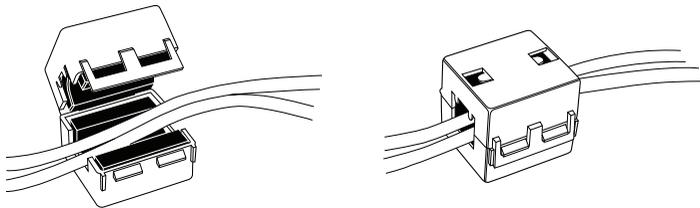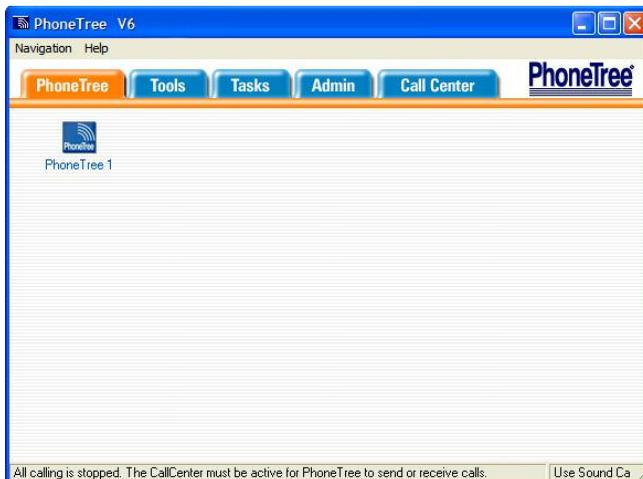
Speaker

Power

USB

Interference

If your PhoneTree experiences radio interference while making calls, install a ferrite clip on the phone cable(s) close to the PhoneTree's phone jack (see page 23).

One-Time Configurations

One-Time Configurations: Desktops

Desktops

Upon opening the PhoneTree software, you will be presented with the **Desktop View**. In this view, you will see that the software is divided into five major sections; each represented by its own tab. These tabs give access to each Desktop View and are an important part of using and navigating through the PhoneTree software. Before you start configuring your PhoneTree, please read the brief description for each tab to help you understand its specific function:

 The **PhoneTree** Desktop stores your call list(s) of names and numbers, as well as your recorded message(s), unique call job settings and other important features.

 The **Tools** Desktop contains useful utilities that relate to your past and present call jobs such as Call Logs. For more information on the Tools Desktop, please see the help files within the software.

 The **Tasks** Desktop stores any built tasks (macros), manual or automatic, created for your call list(s). For more information on Tasks, turn to page 93.

 The **InfoLine** Desktop allows you to create up to **999** call-in InfoLines (for access to assignments, announcements, schedules, directions, etc.). *This feature is only available with the 2500 and 3500 models.* For instructions on how to set up and use InfoLines, please see the help files within the software.

 The **Admin** Desktop contains several features that globally control how PhoneTree makes calls in your area, as well as other settings. The Admin Desktop will be discussed on the following pages.

 The **Call Center** Desktop launches the Call Center from which all actual phone calls are placed and received. For more information on the Call Center, turn to page 83.
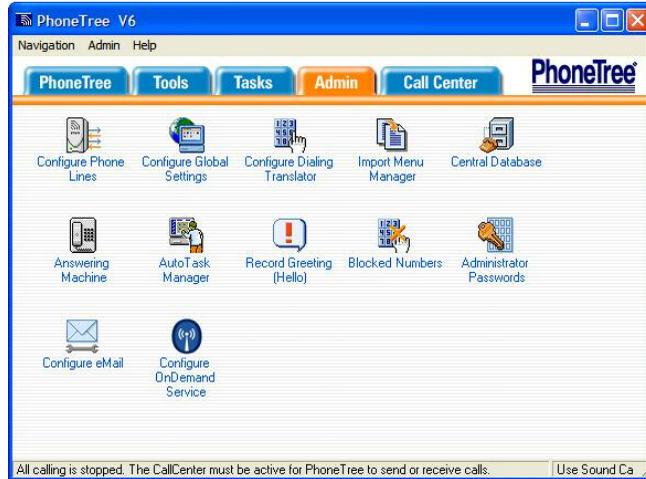
The Admin Desktop

Click on the **Admin** tab from the Desktop View.

To start the basic configuration of your PhoneTree system, you will first need to access the **Admin Desktop**. The Admin Desktop contains several icons *(varies with model)*, some of which globally control how PhoneTree makes calls in your area and from your location. On the following pages, you will learn how to configure the icons needed for your basic PhoneTree setup.

Note: Some features for each icon will not be discussed in this user guide, but have a complete description contained within the help files. To access detailed help for any part of the software, click **Help** from any screen.

# One-Time Configurations: Configure Phone Lines

Step One: Configure Phone Lines

First, click on the **Configure Phone Lines** icon.

On this screen, you will tell PhoneTree how it needs to access the analog phone line(s) you are using. Some phone lines, usually with business phone systems, may require a **Prefix** *(digit(s) that must be dialed before the phone number)* and/or a **Suffix** *(digit(s) that must be dialed after the phone number)* to access an available outside line. If you have a direct analog phone line (i.e. a phone line that is not part of a phone system), then you should not have to add a prefix or suffix to complete a call.

If you are unsure of how your phone line(s) are set up, connect the phone line(s) you intend to use with PhoneTree, one-by-one, to a standard, non-digital telephone and try making a phone call. You will know if you need a prefix/suffix if you cannot complete the call by just dialing a phone number on its own. *If you do require a prefix/suffix to access an outside line and are unaware what numbers to use, please contact your phone system company.*
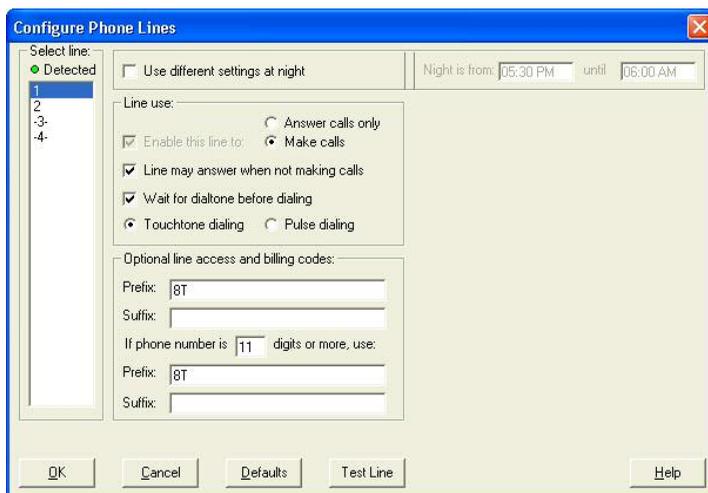
To enter a **Prefix**, type the number in *both* **Prefix** boxes followed by a "**T**" *(wait for dial tone)*.

To enter a **Suffix**, first type the "**T**", followed by the required number(s) in each **Suffix** box.

If your PhoneTree system is a multi-line setup, you may need to set a prefix and/or suffix for each line. To do this, choose the next ascending number in the **Select Line** column (for example, "1" is for Line 1, "2" is for Line 2, etc.) and repeat the process for each line that shows a **green dot** beside the word "Detected."

When you are finished, click **OK**.

*For features not discussed for this icon or for more information, please click **Help**.*

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Step Two: Configure Global Settings

Next, click on the **Configure Global Settings** icon.

Click on the **Misc** tab and enter your company's name in the box labeled "**Name of your organization**" (the name you type here will appear on the top border of the Desktop View as well as any call reports generated in PhoneTree).

PhoneTree can automatically print, save as a file or e-mail reports for your call job results (see page 90). Enter the time you want your reports to generate in the **Enable daily file maintenance to run at** box (default 1:00 AM). **Note: The Call Center must be running during this time.** It is recommended the time set here be after your calls typically end for the day.
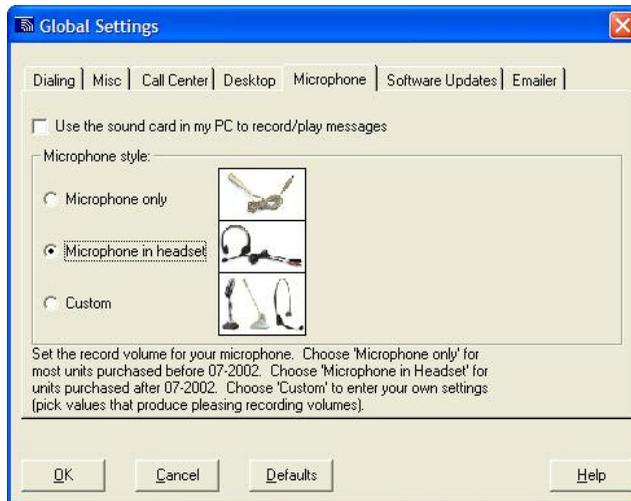
Next, click on the **Microphone** tab.

Uncheck **Use the sound card in my PC...** and then set the microphone style to **Microphone in headset.**

When finished, click **OK**.

*For features not discussed for this icon or for more information, please click **Help**.*

Step Three: Configure Dialing Translator

Click on the **Configure Dialing Translator** icon.

In this section, you will learn how to program the rules set by your phone company for dialing local phone numbers in your area. You will need your phone book or local dialing information (refer to page 22) for this step.

First, look in your phone book and find the local calling section for your city/town. Here, you should find a section labeled "local dialing" that lists all the area codes local to you with their corresponding exchanges. Since PhoneTree requires only the area codes that are local to you, do not worry about obtaining any area codes that are *only* dialed long distance from your city/town. *If your phone book does not list your local area codes and exchanges, try contacting your phone company for information or refer to the website link listed on page 22.*

To add a local area code, click the **Add** button under **Area codes in my list**. On the following screen, enter the area code and then press **[Enter]** on your keyboard.

Under each area code, via the area code drop down box, you will see three columns; **11 digit** (Long Distance), **10 digit** (Metro) and **7 digit** (Local). These columns are used for telling PhoneTree which exchanges for each area code that are local and/or long distance. Since the local dialing information you obtain from your phone company will list what is local, the concept here will be to place the list of exchanges under the 11 digit column and extract the local exchanges from it. If you entered multiple area codes, you will need to repeat this for each area code.

Remember, the concept here is to, one-by-one, move the exchange(s) that require a different dialing method to their appropriate column. For example, with the button placed on 11 digit, let's say exchange number 231 was a local exchange. It would have to be moved from the long distance column to the local column.
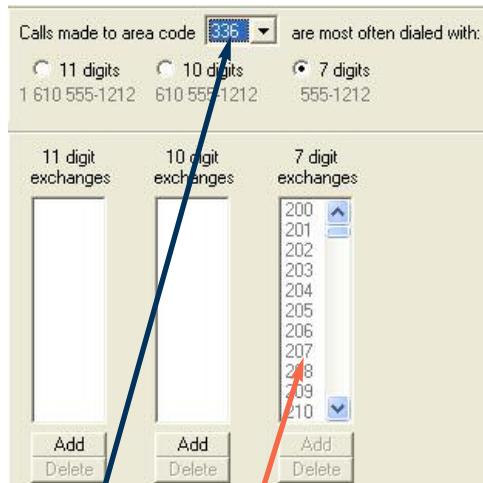
To move an exchange, click the **Add** button beneath the column you wish to move it to, type in the exchange and press **[Enter]** on your keyboard; repeat as needed. When finished, press **[Esc]** on your keyboard. Repeat this process for each area code that requires exchanges to be moved.

When finished, click **OK**.

*For features not discussed for this icon or for more information, please click **Help**.*
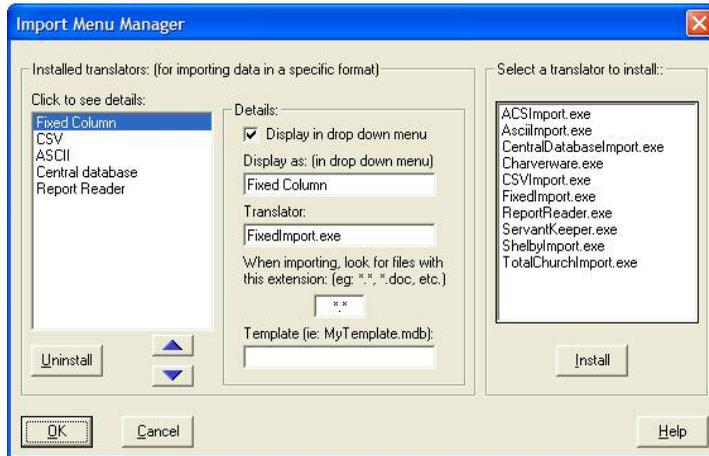
Step Four: Import Menu Manager

Click the **Import Menu Manager** icon.

If you have a list of names and numbers stored in a file, PhoneTree can import that data using one of the supplied translators to create your call list. The translators have been named based on the file format they are designed to work with.

The translators are separated into two different sections:

The left-side box shows the currently installed and ready to use translators which are for the most commonly used file formats.

The right-side box shows the complete list of available translators including the few already installed in the left box. *If you are using a supported membership management or database software package, you will need to install the correct translator.*

To install a translator, click on your translator of choice in the right-side box and then click the **Install** button. This will move a copy of the translator you chose to the left-side box. After the translator moves, it is automatically named as "**New!**" in the **Display as** box under the **Details** section. Rename the translator to the same name that it was in the right-sided box, without the ".exe" as shown in the example above.

When finished, click **OK**.

*For features not discussed for this icon or for more information, please click **Help**.*

One-Time Configurations: Configure eMail

Step Five: Configure eMail

Click on the **Configure eMail** icon.

PhoneTree can be configured to e-mail your call results as an AutoReport (see page 90) and/or messages in text form *(2500 and 3500 only, including SE)* to e-mail addresses in your call lists. The settings on this screen must correspond to a valid e-mail account, and you can get most of these values from the E-Mail Accounts area of your e-mail program, such as Outlook or Outlook Express.

Enter the following information:

User Information:

Your Name - Enter your name here as you would like it to be seen by the people receiving e-mails from the PhoneTree system.

E-mail Address - The e-mail address should be a valid e-mail address which corresponds to all the other settings on this screen.

Logon Information:

User Name - This should be the exact user name you use to access this e-mail account.

Password - This should be the exact password you use to access this e-mail account.

Server Information:

Hostname - This should be exactly as you have it entered in your main e-mail program.

After you have completed each field, click **Test E-Mail Settings**. If everything is correct, you should receive a "Test Succeeded" message, followed by a "Message Sent" dialog. Check your email to make sure you received the sample message. If you receive a "Connection Failed" message, it means that one or more of your settings are incorrect. Please access the help files for information on how to troubleshoot this issue. When finished, click **OK**.

Additional Icons

These icons refer to additional features you can use to further customize your PhoneTree. Below are brief descriptions for each of these icons and what they do. **Note:** For a detailed explanation on how to use and set up each of the icons, please reference the help files accessible via the **Help** button located on any screen.

Central Database is used to keep a master list of your contacts that may be used with the PhoneTree system. Any time you wish to make a change to any of the contacts, you can make the change here and then set individual PhoneTree icons to automatically sync with the Central Database, so that changes need only to be made in one place.

Answering Machine allows you to set up your PhoneTree to act as an answering machine while it is not making any outbound calls.

AutoTask Manager is part of setting up a Task. See page 93 for more information on Tasks.

Remote Operation lets you call in to PhoneTree and access most major functions including recording your message, selecting whom to call, changing the calling times, and more (see page 107).

Administrator Passwords allows you to password-protect the Admin Tab.

Record Greeting (Hello) allows you to create your own greetings or preview the pre-recorded greetings shipped with the PhoneTree software.

Blocked Numbers stores any phone number hand-entered into this database or selected from the List Editor screen (see page 172).

Configure OnDemand Service allows you to set up an OnDemand account for times that you may need to contact everyone on your call list quickly, for an emergency or other time-sensitive reason (see page 113). *Call sessions made with OnDemand carry a per-call charge and have message time limits of 1 minute for calls placed with EasyCall and 2 minutes for the Call Wizard.*

2500 SE and 3500 SE Users: If you have a **PhoneTree 2500 SE** or **3500 SE**, it is *required* that OnDemand is set up before you can make calls.

PhoneTree 2500 and up:

PhoneTree Administrator allows you to manage all of the PhoneTrees under the PhoneTree tab. Here, you can rename, password-protect, lock and even change the number of PhoneTrees (up to 256) available.

Configure Language Codes allows you to program up to 99 different languages in your PhoneTree for multi-lingual capability. You can use this feature with importing a file or by manually building your call list in PhoneTree. *This feature does not work for e-mail messaging.*

PhoneTree 3500 (and SE) only:

Configure Flex Fields gives you the ability to configure parts of your message to change based on the data PhoneTree reads from a file.

Configure Text-to-Speech gives you control over which Text-to-Speech engine you wish to use (basic or advanced), the voice gender and voice quality settings (via the Advanced button).

System Console is an advanced feature that allows control over call options and other settings for all the PhoneTrees in an expanded view. *This feature should be used with caution! For more information on how to successfully use System Console, please click the* **Help** *button.*

Notes

Your First Call Job

Your First Call Job

In the previous sections, you were shown the necessary steps to prepare your PhoneTree system to make calls. Next, we suggest that you try making a test call to yourself to be sure your PhoneTree can complete the call with no difficulty. This section will show you how to manually add yourself to the call list, record a message and start calling using **EasyCall**, one of two ways to launch calls. After you have completed this section, turn to the appropriate page number that covers the model of PhoneTree you have purchased (see page 40) to access additional configurations. There you will find even more configurations that will help you to customize your PhoneTree to meet your specific needs.

Note: The following screens may vary depending on your PhoneTree model.

1 From the Desktop View, click on the **PhoneTree** tab, then, click on **PhoneTree 1**.
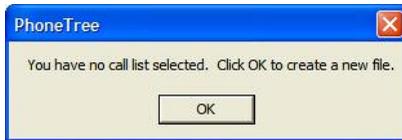
2 Click **OK** for the box that appears. Then, enter a name for this particular call list and click **OK**.

3 You are now presented with the **List Editor** screen. From the top toolbar, click **Add**.

4 After the **Add Person** window appears, enter your name and corresponding phone number for this test call job. Repeat for any additional entries you wish to make. Click **OK** when finished.

5 You will now see your name and phone number added to the list. You will also see a Translated phone number and a Call Status displayed. The Translated phone number column shows exactly how PhoneTree will dial that number by using the rules you set earlier in the Configure Dialing Translator (see page 30). The Call Status column shows whether or not an individual has been called and what PhoneTree encountered during that phone call (i.e. Answered By Person, Answered by Machine, Busy, etc.). *For a complete list of call statuses, see page 85.*

6   Click on the **EasyCall** icon from the top toolbar.

Click Record to record your message.

Click Play to listen to your message.

Click Call to start your calls.
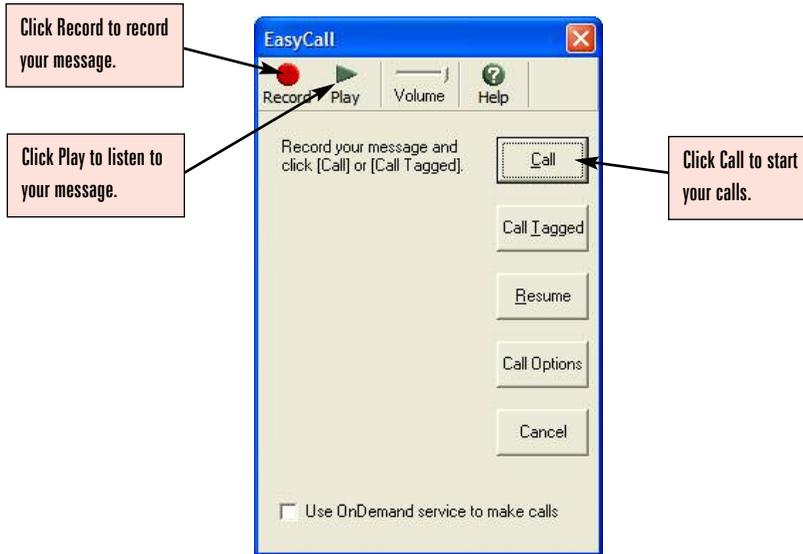
To record your message, click **Record** and speak into the headset microphone after you hear the beep. When you are finished, click **Stop**.

To review what was recorded, click **Play**.

Once you are ready to launch your call list, click **Call**.

Once **Call** is pressed, the PhoneTree will launch the **Call Center**. Turn to page 83 for more information on what the Call Center is and how it operates.

If you would like to generate a report showing your call results once your call job is finished or configure PhoneTree to automatically do this for you, turn to page 87.

Congratulations, you have completed your first call job!

As stated before, EasyCall is one of two methods for launching your call job. The other option is using the Call Wizard – offering a walk-through interface, the option of saving your message(s) and other call options such as e-mail messaging (2500 model and up). To take advantage of the Call Wizard and additional configurations for any PhoneTree model, please refer to the model number listings below and turn to its appropriate section. *If you prefer to use EasyCall to make your calls, please click **Help** for information on enabling additional call options such as Night and Machine messages.*

PhoneTree 2100 - Page 41

PhoneTree 2500 - Page 51

PhoneTree 3500 - Page 63

2100

2100

Now that your PhoneTree 2100 is configured to work with your phone lines and dialing rules in your area, you are now ready to set up your message. On the following pages you will be shown, step-by-step, how to import your call list using a file, configure the call times, record a message and start making outbound calls using the Call Wizard. If you prefer to use EasyCall to make your calls once you have configured your call times and other options, please see page 40.
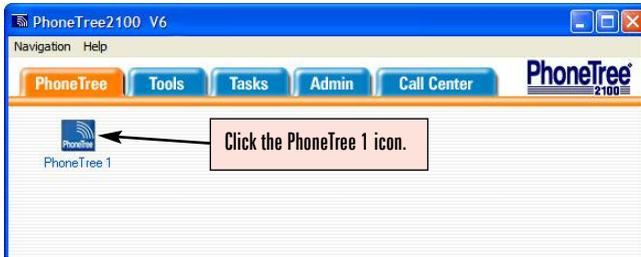
Note: Since this section only covers the basic call setup, some options and features are not discussed thoroughly. For more information regarding any option or feature, please click a **Help** button which will display information on that feature.

In order for PhoneTree to make or receive phone calls, the Call Center must be running during your preset call times (see page 84).
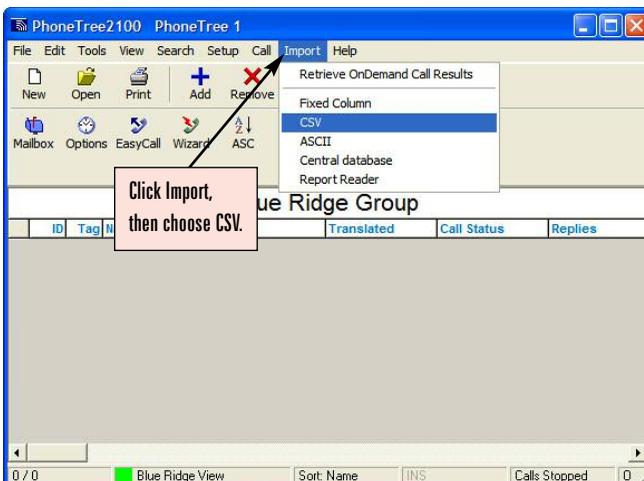
Let's Begin!

Setting Up a Call Job:

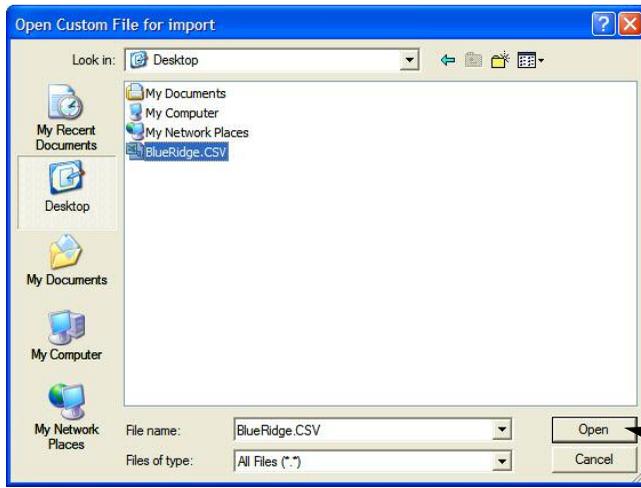**1** From the Desktop View, click on the **PhoneTree** tab, then, click on **PhoneTree 1**.

Click the PhoneTree 1 icon.

PhoneTree2100

You have no call list selected. Click OK to create a new file.

OK

Name New File As...

Save File as:

Blue Ridge Group

Existing Files:

OK   Cancel   Help

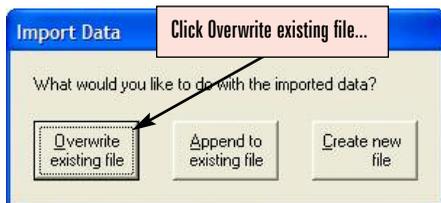**2** Click **OK** for the box that appears. Then, enter a name for this particular call list and click **OK**.

---

3 Now it is time to import the file that contains your name and numbers (or add them one-by-one as described on page 38). For this example, we will use a CSV file. *(If your file requires a different translator other than CSV, please choose that instead.)* Click **Import** at the top of the screen and then choose **CSV**.

Retrieve OnDemand Call Results
Fixed Column
CSV
ASCII
Central database
Report Reader

Click Import, then choose CSV.

ue Ridge Group

ID Tag N   Translated   Call Status   Replies

0 / 0   Blue Ridge View   Sort: Name   INS   Calls Stopped   0

4 Browse to the file to import. Click **Open**.

Locate your file, then click Open.

Click Overwrite existing file...

5 A window will appear asking you what you would like to do, click **Overwrite existing file**. When the next window appears, click **Configure** before the timer runs out.
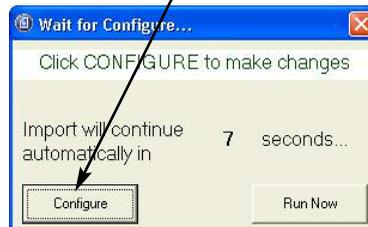
...then click Configure.

6 The CSV translator appears. Using the drop down boxes for **Last Name**, **First Name** and **Phone**, make the choices appropriate to the data in your file. Then, click **OK**.

Click the drop-down boxes to set the data for each field.

ID	Tag	Name	Phone	Translated	Call Sta
1	☐	Adams, Meghan	(336) 555-9475		Not Calle
2	☐	Anderson, Rebecca	(336) 555-9949		Not Calle
3	☐	Forester, Lauren	(336) 555-8938		Not Calle
4	☐	Gonzales, Jessie	(336) 555-7911		Not Calle
5	☐	Horton, Maria	(336) 555-5579		Not Calle
6	☐	Morton, Carrie	(336) 555-4741		Not Calle
7	☐	Mory, Julia	(336) 555-3354		Not Calle
8	☐	Motsinger, Jenna	(336) 555-4354		Not Calle
9	☐	Nostitz, Carol	(336) 555-2112		Not Calle
10	☐	Pirkle, Christina	(336) 555-1410		Not Calle
11	☐	Rabil, Emily	(336) 555-6392		Not Calle
12	☐	Rodgers, Sarah	(336) 555-9513		Not Calle
13	☐	Scott, Virginia	(336) 555-3461		Not Calle
14	☐	Shaffner, Cynthia	(336) 555-3889		Not Calle
15	☐	Spangler, Katie	(336) 555-7677		Not Calle
16	☐	Werkman, Anne	(336) 555-9464		Not Calle

7 After your data imports, you should see your call list appear as shown here. Make sure that the data looks correct.

If you need to add another entry to the list after the file has been imported, click the **Add** button from the top toolbar. To remove an entry, click on the name and then click **Remove**.

---

8 Click on the **Options** icon from the top toolbar.

Click on the Don't call before/after times to set when PhoneTree starts and stops calling.

Use the up and down arrows to change the hour and minutes.

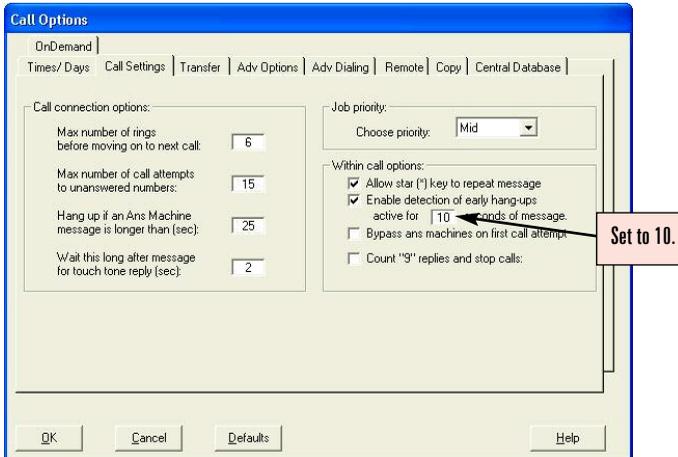Uncheck any day you don't want to make calls on.

8a The first tab of **Call Options**, **Time/Days**, allows you to tell PhoneTree which days of the week and what time during those days you want to make calls.

Uncheck any day(s) you do not want to make calls on.

To change the **Don't call before** and **Don't call after** times for all of the days of the week, click on each of the time fields under **Sun**. A box will then appear. Use the four arrows to adjust the hours and minutes. If you would like to set different times for each day, select the **Allow different times for each day** box, then individually click on each day to set the times.
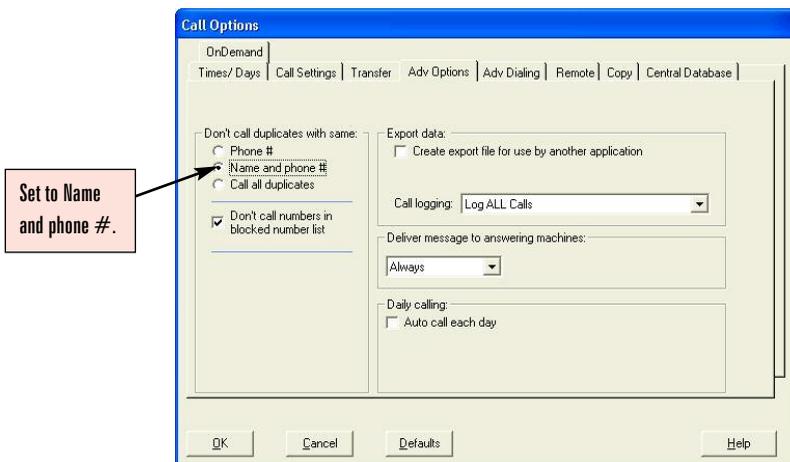
Set to 10.

8b Next, click on the **Call Settings** tab.

Leave the **Call connection options** to their default settings.

The **Allow star (*) key to repeat message** option allows the message to be repeated if star is pressed by announcing it during your message. Uncheck if this is not desired.

Set **Enable detection of early hang-ups**.... to 10 seconds.

Set to Name and phone #.

8c Click on the **Adv Options** tab.

Set the **Don't call duplicates with same** to **Name and phone #**.

Then, click **OK**.

9 Click on the **Wizard** icon from the top toolbar.

The **Call Wizard** will take you step-by-step through the various call options and how to record your message(s) for your outbound calls. Unlike EasyCall, the Call Wizard allows you to save any messages that you record for later use.

Call Wizard: Blue Ridge Group

The Call Wizard will guide you through the advanced messaging options.

Cancel   Help   Call Options...   <- Previous   Next ->

9a Upon opening the Call Wizard, click **Next**.

Call Wizard: Blue Ridge Group

Select the message(s) you wish to record: (check all that apply).

Required: ☑ Standard   (your default message)

Optional: ☑ Night   (alternate message after hours)
          ☑ Machine   (alternate message to ans. machines)
          ☑ Intro w/9   (request '9' to confirm call delivery)
          ☑ More Info   (give more information after pressing #)
          ☑ Groups   (use group messaging - see instructions)

Cancel   Help   Call Options...   <- Previous   Next ->

9b Choose which message option(s) you would like to add in addition to your outgoing message (*for detailed information on each of these options, click **Help***), then, click **Next**.
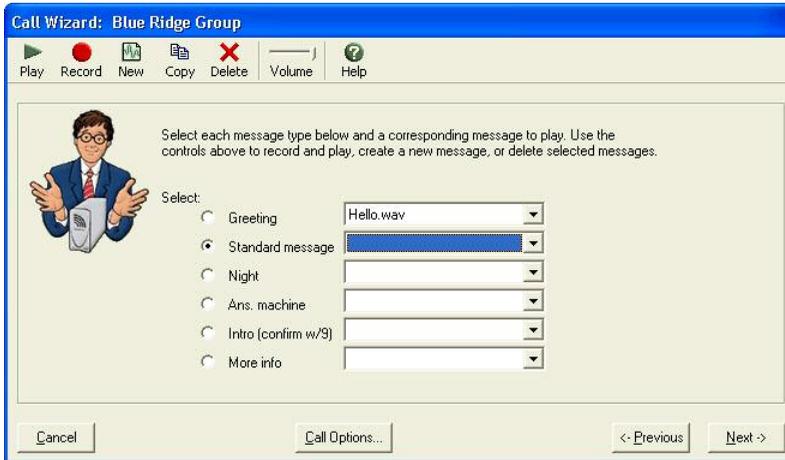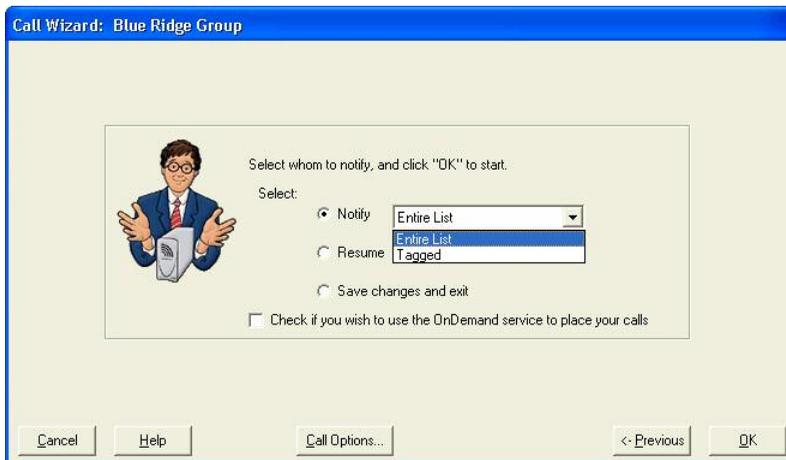
9c The message options chosen on the previous screen will determine which and how many of the drop-down boxes [i.e. Night, More Info] appear. Select the **Standard message** box. Then, from the top toolbar, click **New**. A box will appear requesting a title for the message. Enter a title for the message and then click **OK**. Repeat for each additional message option.
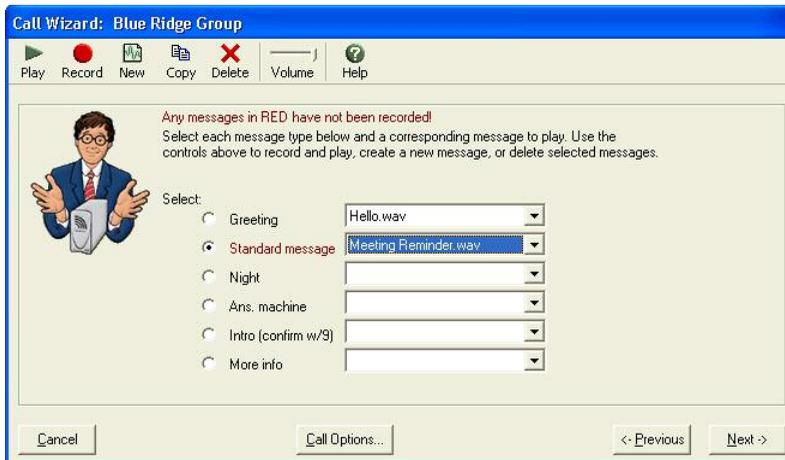
9d Next, one-by-one, you will need to record each message option. Click **Record** from the top toolbar and speak into the headset microphone after you hear the beep. Click **Stop** when finished. To review what was recorded, click **Play**. Repeat for each message option. When finished, click **Next**.

9e In the **Notify** drop down box, either choose the **Entire List** view (all members will be notified), or any custom view you have set up or **Tagged** (only the members checked on the call list will be called). Then, click **OK** to launch your call job.

Once you press **OK**, the **Confirm Start Job** window will appear showing how many people you are about to call and asking if you wish to continue. If you are ready to start your calls, click **Yes**. If you click **No**, you will exit the Call Wizard completely.

Notes

2500

2500

Now that your PhoneTree 2500 is configured to work with your phone lines and dialing rules in your area, you are now ready to set up your message. On the following pages you will be shown, step-by-step, how to import your call list using a file, configure the call times, record a message, set up e-mail messaging, set up multi-lingual messaging and start making outbound calls using the Call Wizard. If you prefer to use EasyCall to make your calls once you have configured your call times and other options, please see page 40 (*EasyCall does not contain all of the call features that are available with the Call Wizard*).

2500 SE users: If you have the 2500 SE, you will use the same instructions supplied here to record your message(s) and make your calls. Please make sure you have already set up your OnDemand account before proceeding (see page 113).

Note: Some options and features are not discussed thoroughly. For more information regarding any option or feature, please click a **Help** button which will display information on that feature.

The next page lists the additional Admin icons included with the 2500 and 3500 models. Please review the information provided for these icons before you begin setting up your calls.

In order for PhoneTree to make or receive phone calls, the Call Center must be running during your preset call times (see page 84).

Let's Begin!

Additional Admin Desktop Features (2500 and up):

PhoneTree Administrator

The PhoneTree Administrator tool allows you to manage all of the PhoneTrees under the PhoneTree tab. Here, you can rename, password-protect, lock or change the number of PhoneTrees available. *For more information regarding this icon, please click **Help**.*

Configure Language Codes

Your PhoneTree has the ability to deliver vocal messages in different languages to members in your call list *(this feature does not work for e-mail messaging)*. You can use this feature with importing a file or by manually building your call list in PhoneTree.

Each language that will be used with your PhoneTree will need to be entered and assigned a code to represent it (i.e. "E" for English, "S" for Spanish, etc.) under the **Lang code** column. Then, under the **Language** column, enter the name of the language as shown in the example above.

Note: If you plan on importing a file and have a field on the file that contains the language code, be sure that the codes entered here match what appears on the file. If you are building your list by adding members to the call list manually, you can set the language for each member by choosing from what you have added here. If there is no language assigned to a member, then the default language, #0, will be used for them.

*For features not discussed for this icon or for more information, please click **Help**.*

Setting Up a Call Job:

1 From the Desktop View, click the **PhoneTree** tab, then, click **PhoneTree 1**. The other PhoneTree icons can be used for additional call lists (up to 256, using the PhoneTree Administrator). Repeat this section to set up another PhoneTree for a different list and message.
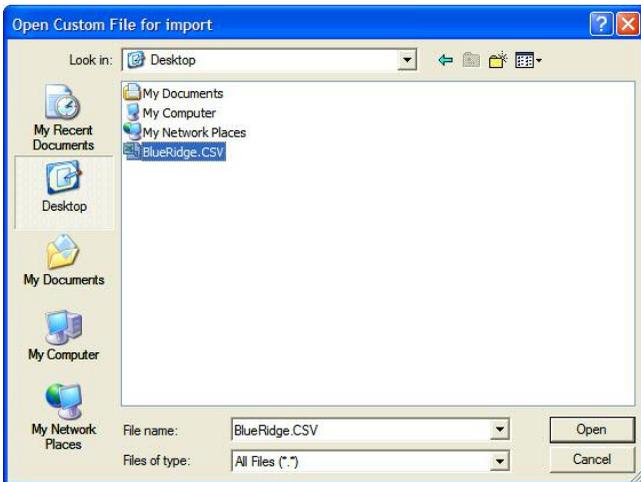

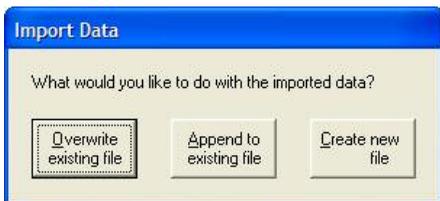**2** Click **OK** for the box that appears. Then, enter a name for this particular call list and click **OK**.
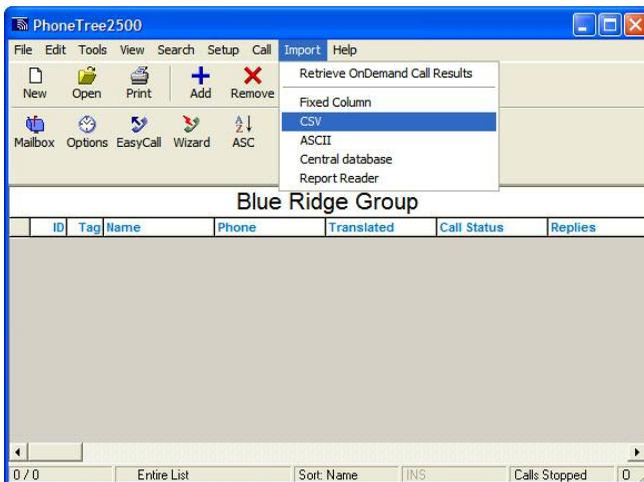
3 Now it is time to import the file that contains the names and numbers (or add them one-by-one as described on page 38). For this example, we will use a CSV file. *(If your file requires a different translator other than CSV, please choose that instead.)* Click **Import** at the top of the screen and then choose **CSV**.

4 Browse to the file to import. Click **Open**.

5 A window will appear asking you what you would like to do, click **Overwrite existing file**. When the next window appears, click **Configure** before the timer runs out.

6 The CSV translator appears. Using the drop down boxes for **Last Name**, **First Name** and **Phone**, make the choices appropriate to the data in your file. Then, click **OK**.

ID	Tag	Name	Phone	Translated	Call Sta
1	☐	Adams, Meghan	(336) 555-9475		Not Calle
2	☐	Anderson, Rebecca	(336) 555-9949		Not Calle
3	☐	Forester, Lauren	(336) 555-8938		Not Calle
4	☐	Gonzales, Jessie	(336) 555-7911		Not Calle
5	☐	Horton, Maria	(336) 555-5579		Not Calle
6	☐	Morton, Carrie	(336) 555-4741		Not Calle
7	☐	Mory, Julia	(336) 555-3354		Not Calle
8	☐	Motsinger, Jenna	(336) 555-4354		Not Calle
9	☐	Nostitz, Carol	(336) 555-2112		Not Calle
10	☐	Pirkle, Christina	(336) 555-1410		Not Calle
11	☐	Rabil, Emily	(336) 555-6392		Not Calle
12	☐	Rodgers, Sarah	(336) 555-9513		Not Calle
13	☐	Scott, Virginia	(336) 555-3461		Not Calle
14	☐	Shaffner, Cynthia	(336) 555-3889		Not Calle
15	☐	Spangler, Katie	(336) 555-7677		Not Calle
16	☐	Werkman, Anne	(336) 555-9464		Not Calle

7 After your data finishes importing, you should see your call list appear as shown here. Make sure all intended fields were imported. *Some fields are not available in the Entire List view. To create a custom view to include or change which columns you see here, see page 103.*

If you need to add another entry to the list after the file has been imported, click the **Add** button from the top toolbar. To remove an entry, click on the name and then click **Remove**.
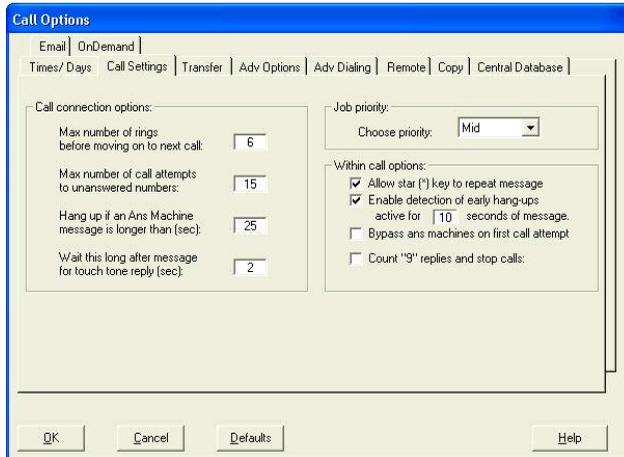
---

8 Click on the **Options** icon from the top toolbar.

8a The first tab of **Call Options**, **Time/Days**, allows you to tell PhoneTree which days of the week and what time during those days you want to make calls.

Uncheck any day(s) you do not want to make calls on.

To change the **Don't call before** and **Don't call after** times for all of the days of the week, click on each of the time fields under **Sun**. A box will then appear. Use the four arrows to adjust the hours and minutes. If you would like to set different times for each day, select the **Allow different times for each day** box, then individually click on each day to set the times.
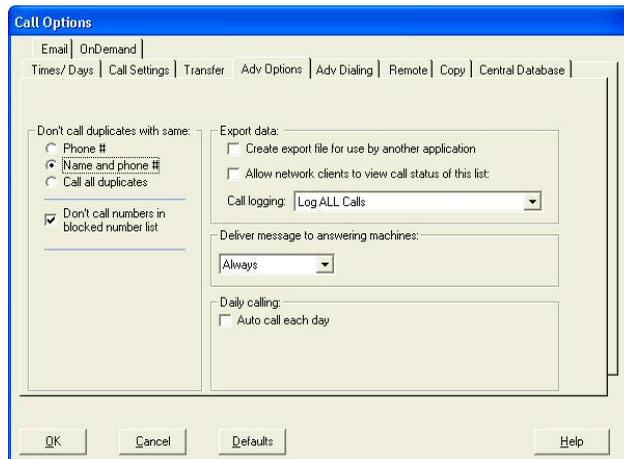
8b Next, click on the **Call Settings** tab.

Leave all of the **Call connection options** to their default settings.

The **Allow star (*) key to repeat message** option allows the message to be repeated if the star key is pressed by announcing it during your message. Uncheck if this is not desired.

Set **Enable detection of early hang-ups**.... to 10 seconds.

8c Click on the **Adv Options** tab.

Set the **Don't call duplicates with same** to **Name and phone #**.

Then, click **OK**.

9 Click on the **Wizard** icon from the top toolbar.

The **Call Wizard** allows many options for different types of messages (as opposed to using EasyCall). Using the Call Wizard, you can create the standard recorded message or, add several different message options such as a Night Message. You can set up e-mail messages, multi-lingual messages and even use touch tone responses with your message for surveys or to have someone respond to certain parts of your message.

This section covers three types of messages you can configure in the Call Wizard: Standard, Multi-Lingual and E-mail. The instructions for each type of message have been separated for each screen and allow you to set up one type of message or all three at once if you choose. **Note:** The Multi-Lingual message requires the Standard message to be configured at the same time in order for it to properly work; Standard and E-mail alone do not.

At any point during the setup of the Call Wizard you do not understand a specific function or want more information, click the **Help** button.

Call Wizard: Blue Ridge Group

The Call Wizard will guide you through the advanced messaging options.

☐ Check if you wish to create multi-lingual messages
☐ Check if you wish to send an e-mail message

Cancel   Help   Call Options...   <- Previous   Next ->

9a **To set up a Standard Message**
Upon opening the Call Wizard, click **Next**.

To set up a Multi-Lingual Message
Upon opening the Call Wizard, click on **Check if you wish to create multi-lingual messages**, then, click **Next**.

To set up an E-mail Message
Upon opening the Call Wizard, click on **Check if you wish to send an e-mail message**, then, click **Next**.

9b **E-mail Message continued...**
Choose from one of the three choices for sending e-mail messages, then, click **Next**.
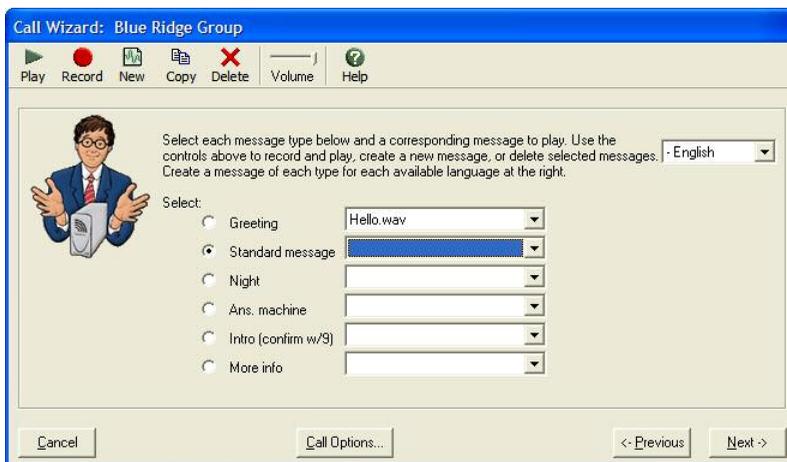

9c **Standard Message continued...**
Choose which message option(s) you would like to add in addition to your recorded message (*for detailed information on each of these options, click **Help***), then, click **Next**.

Multi-Lingual Message continued...
Choose which message option(s) you would like to add in addition to your recorded message (*for detailed information on each of these options, click **Help***), then, click **Next**.

9d **Standard Message continued...**
The message options chosen on the previous screen will determine which and how many drop-down boxes [i.e. Night, More Info] appear. Select the **Standard message** box. Then, from the top toolbar, click **New**. A box will appear requesting a title for the message. Enter a title for the message and then click **OK**. Repeat for each additional message option.

9e **Standard Message continued...**
Next, one-by-one, you will need to record each message option. Click **Record** from the top toolbar and speak into the headset microphone after you hear the beep. Click **Stop** when finished. To review what was recorded, click **Play**. Repeat for each message option. When finished, click **Next**.

Multi-Lingual Message continued...
First, change the language from English to a different language via the drop-down box in the top right corner. Then, record each message option for that language. Repeat for each language. When finished, click **Next**.
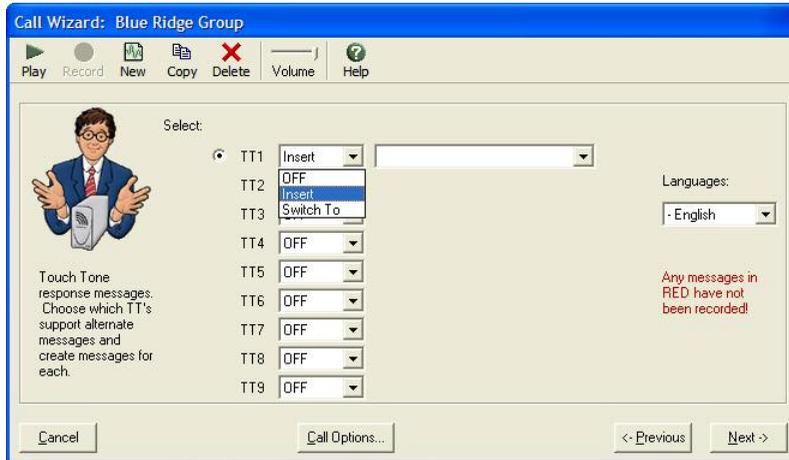
9f **Standard Message continued...**

If you chose **TT Response** as a message option, you will see this screen. The touch tone reply numbers you choose here should coincide with what you mention in your message *(for detailed information on how to set up a touch tone reply, click the **Help** button from the top toolbar)*. When finished, click **Next**.

Multi-Lingual Message continued...

If your multi-lingual messages use the touch tone reply feature too, you will need to record those as well. First, change the Languages drop-down box from English to a different language, then proceed with recording the touch tone replies as with the English message. When finished, click **Next**.
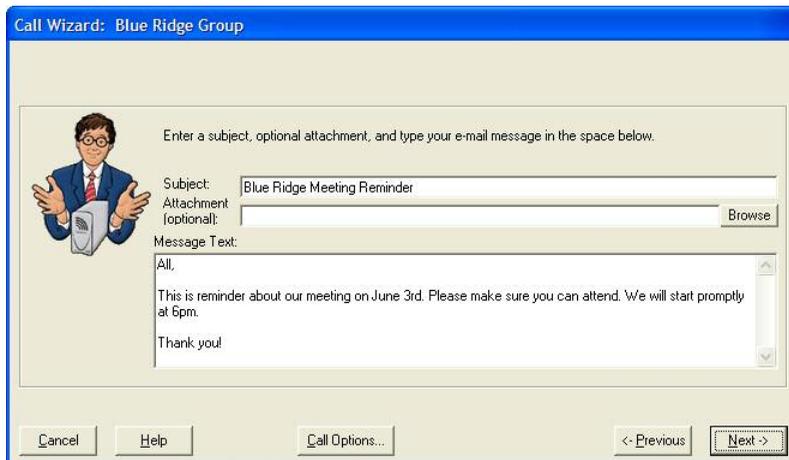
9g **E-mail Message continued...**

Enter a subject and message for your e-mail here. If you wish to send an attachment, click the **Browse** button to locate and include it with the e-mail. When finished, click **Next**.

9h **All Messages**
In the **Notify** drop down box, either choose the **Entire List** view (all members will be notified), or any custom view you have set up or **Tagged** (only the members checked on the call list will be called). Then, click **OK** to launch your call job.

Once you press **OK**, the **Confirm Start Job** window will appear showing how many people you are about to call and asking if you wish to continue. If you are ready to start your calls, click **Yes**. If you click **No**, you will exit the Call Wizard completely.

After you click **Yes**, this will launch the **Call Center** for the 2500 or the **OnDemand Packager** for the 2500 SE.

For information on what the Call Center is and how it functions, see page 83.

For information on how to initiate the OnDemand Packager, see pages 123-124.

If you would like to generate a report showing your call results once your calls are finished or configure PhoneTree to automatically do this for you, turn to page 87.

3500

3500

Now that your PhoneTree 3500 is configured to work with your phone lines and dialing rules in your area, you are now ready to set up your message. On the following pages you will be shown, step-by-step, how to import your call list via a file, configure flex fields, configure the call times, record a message, set up e-mail messaging, set up multi-lingual messaging and start making outbound calls using the Call Wizard.

If you do not need these advanced options and prefer to use EasyCall to make your calls once you have configured your call times and other options, please see page 40 (*EasyCall does not contain all of the call features that are available with the Call Wizard*).

3500 SE users: If you have the 3500 SE, you will use the same instructions supplied here to record your message(s) and make your calls. Please make sure you have already set up your OnDemand account before proceeding (see page 113).

Note: Some options and features are not discussed thoroughly. For more information regarding any option or feature, please click a **Help** button which will display information on that feature.

The next page lists the additional Admin icons included with the 3500 model only. Please review the information provided for these icons before you begin setting up your calls.

In order for PhoneTree to make or receive phone calls, the Call Center must be running during your preset call times (see page 84).

Let's Begin!

Additional Admin Desktop Features for 3500 (and SE) only:

Configure Flex Fields

Flex Fields give you the ability to configure parts of your message to change based on the data PhoneTree reads from a file. For instance, you could set up a Flex Field called "Location" and within that Flex Field, have three different locations. In your message, you could insert the "Location" flex field and depending on the location each member of your call list is listed with, that location would play back during the message. The field would change based on the location the person was assigned to either by a manual list build or by reading a file.

It is recommended that you first set up any Flex Fields you plan to use as part of your message *before* **you begin the instructions on the next page**.

If you plan on using the **Alternate Phone Numbers** feature (page 71), which will allow you to try two additional phone numbers per member (up to three phone numbers), you will need to set up a flex field for each of those.

Configure Text-to-Speech

The Text-to-Speech software included with your PhoneTree system allows you to have any part of your message spoken by the Text-to-Speech software instead of your voice. Later in the Call Wizard, you will be shown how to enable this option for your messages. *For more information on how to use Text-to-Speech, please click the* **Help** *button*.

System Console

This is an advanced feature that allows control over call options and other settings for all the PhoneTrees in an expanded view. *This feature should is for advanced users only! Please call Customer Support for supervision or click the* **Help** *button*.

Configuring a Flex Field

It is recommended that if you plan on using a flex field with your message that you first configure it before setting up PhoneTree to make calls. This section will discuss how to edit a flex field by using an example called "Office Location." This example will also be used later in the chapter to illustrate how to use the flex field with your message. If you are not planning on using flex fields with your message, proceed to page 68.
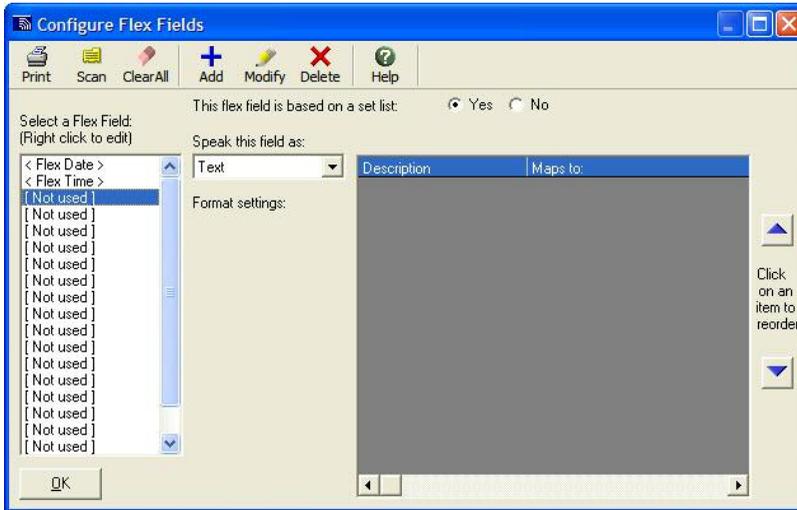
a) From the **Admin** Desktop, click on **Configure Flex Fields**.

Under the **Select a Flex Field** column, the first two flex fields listed are Flex Date and Flex Time. These flex fields are preconfigured to allow the time and/or date from your file to be announced in your message if you choose to include them. Skip to the third flex field, **[Not used]**.
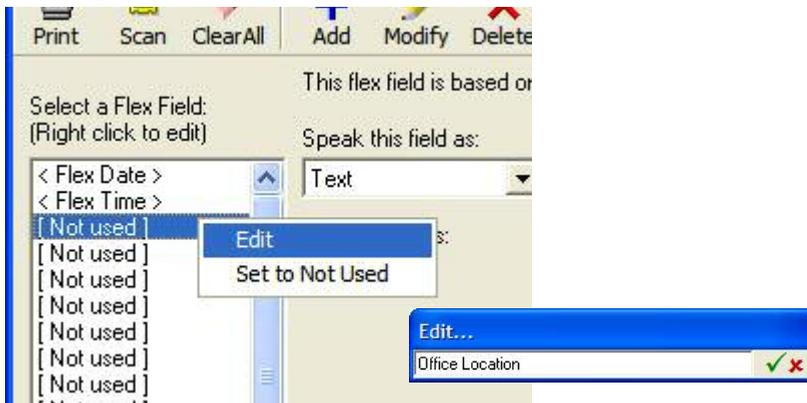
b) Right click on **[Not used]** and then choose **Edit**. Enter a name for the flex field and then click the **green check mark**.

c) Once you have created a name for the flex field, you will need to add the items for it. Using our example, Office Location, we have four locations that will be added: South, North, East and West Offices. Each of these locations will be given a name and a value that lets us know how to identify it on the file that will be imported. For instance, the above example shows **South Office** in the **Flex item description** box and "**SO**" for the **Maps to this value**... box. The **Flex item description** will represent how the location appears on the call list and the **Maps to this value**... is the data we are looking for from the file we import. Later in this chapter, we will discuss how to set a flex field to look for the intended data from the file.

To add an item to a flex field, click **Add** from the top toolbar and then enter the **Flex item description** and **Maps to value**... Repeat for each item.
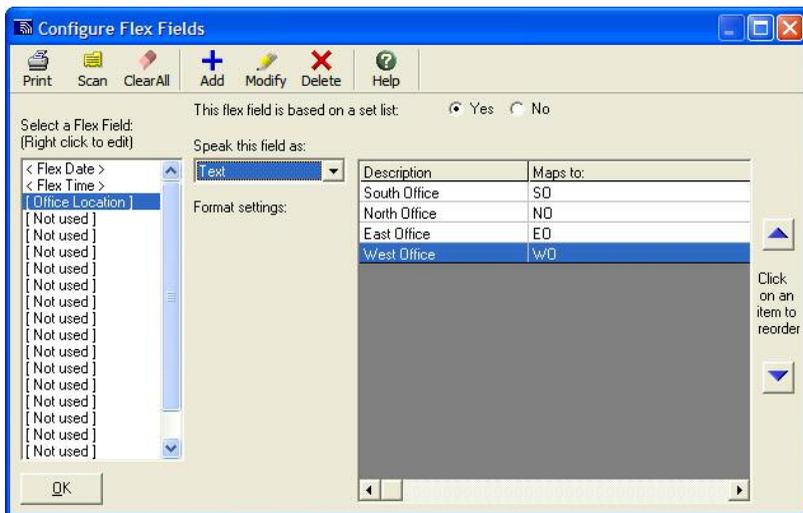
In this example, we see how each item appears after being added. *For more information on how to set up Flex Fields, click the **Help** button located within.*

Continue to the next page when you are ready to set up your PhoneTree to make calls.

Setting Up a Call Job:

1 From the Desktop View, click the **PhoneTree** tab, then, click **PhoneTree 1**. The other PhoneTrees can be used for additional call lists (up to 256 using the PhoneTree Administrator). Repeat this section to set up another PhoneTree for a different list and message.

2 Click **OK** for the box that appears. Then, enter a name for this particular call list and click **OK**.
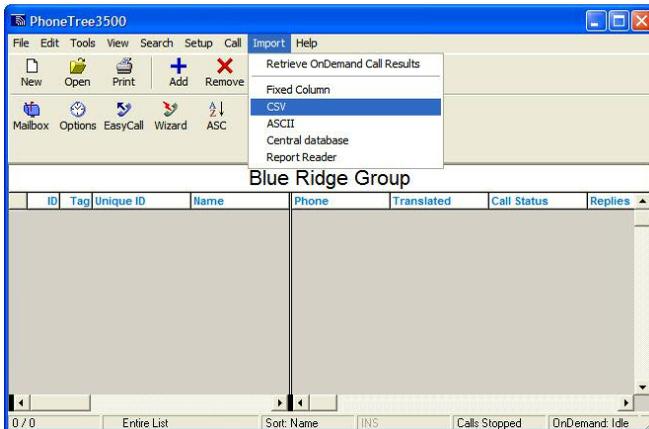
3 Now it is time to import the file that contains your name and numbers (or add them one-by-one as described on page 38). *(If your file requires a different translator other than CSV, please choose that instead.)* Click **Import** at the top of the screen and then choose **CSV**.
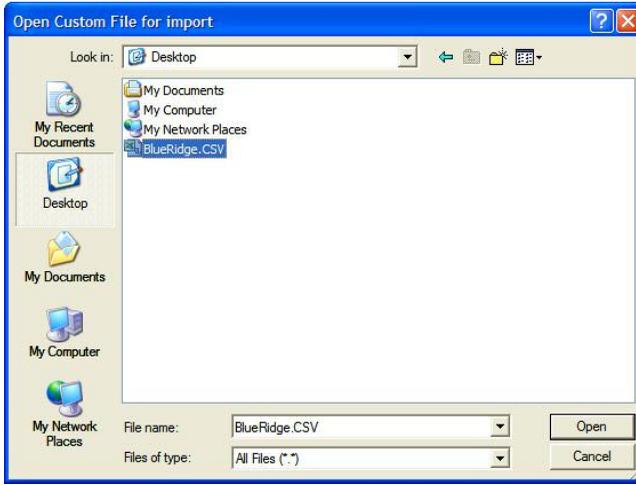
4 Browse to the file to import. Click **Open**.

5 A window will appear asking you what you would like to do, click **Overwrite existing file**. When the next window appears, click **Configure** before the timer runs out.
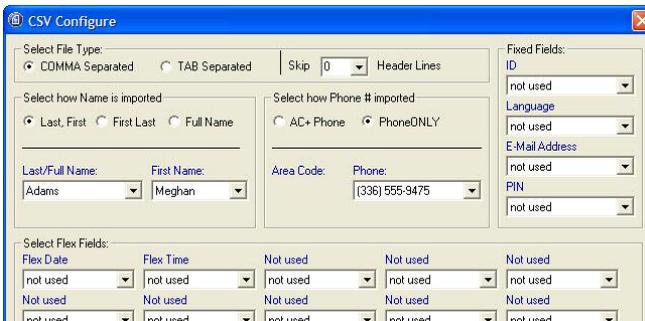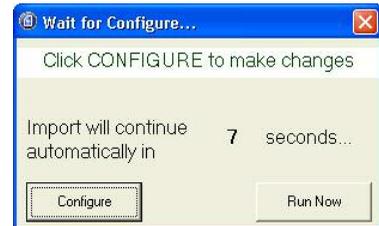
6 The CSV translator appears. Using the drop down boxes for **Last Name**, **First Name** and **Phone**, make the choices appropriate to the data in your file. Also, if your file contains e-mail addresses, multi-lingual codes or any data that will act as a Flex Field, set those fields as well. When finished, click **OK**.

ID	Tag	Name	Phone	Translated	Call Sta
▶ 1	☐	Adams, Meghan	(336) 555-9475		Not Calle
2	☐	Anderson, Rebecca	(336) 555-9949		Not Calle
3	☐	Forester, Lauren	(336) 555-8938		Not Calle
4	☐	Gonzales, Jessie	(336) 555-7911		Not Calle
5	☐	Horton, Maria	(336) 555-5579		Not Calle
6	☐	Morton, Carrie	(336) 555-4741		Not Calle
7	☐	Mory, Julia	(336) 555-3354		Not Calle
8	☐	Motsinger, Jenna	(336) 555-4354		Not Calle
9	☐	Nostitz, Carol	(336) 555-2112		Not Calle
10	☐	Pirkle, Christina	(336) 555-1410		Not Calle
11	☐	Rabil, Emily	(336) 555-6392		Not Calle
12	☐	Rodgers, Sarah	(336) 555-9513		Not Calle
13	☐	Scott, Virginia	(336) 555-3461		Not Calle
14	☐	Shaffner, Cynthia	(336) 555-3889		Not Calle
15	☐	Spangler, Katie	(336) 555-7677		Not Calle
16	☐	Werkman, Anne	(336) 555-9464		Not Calle

7 After your data imports, you should see your call list appear as shown here. Make sure that the data looks correct. *Some fields are not available in the Entire List view. To create a custom view to include or change which columns you see here, see page 103.*

If you need to add another entry to the list after the file has been imported, click the **Add** button from the top toolbar. To remove an entry, click on the name and then click **Remove**.

---

8 Click on the **Options** icon from the top toolbar.

8a The first tab of **Call Options**, **Time/Days**, allows you to tell PhoneTree which days of the week and what time during those days you want to make calls.

Uncheck any day(s) you do not want to make calls on.

To change the **Don't call before** and **Don't call after** times for all of the days of the week, click on each of the time fields under **Sun**. A box will then appear. Use the four arrows to adjust the hours and minutes. If you would like to set different times for each day, select the **Allow different times for each day** box, then individually click on each day to set the times.

8b Next, click on the **Call Settings** tab.

Leave all of the **Call connection options** to their default settings.

The **Allow star (*) key to repeat message** option allows the message to be repeated if star is pressed by announcing it during your message. Uncheck if this is not desired.

Set **Enable detection of early hang-ups**.... to 10 seconds.

Enable **Use alternate phone numbers** if you have more than one phone number for each member. *For more information or how to set up the alternate phone number feature, please click* **Help**.
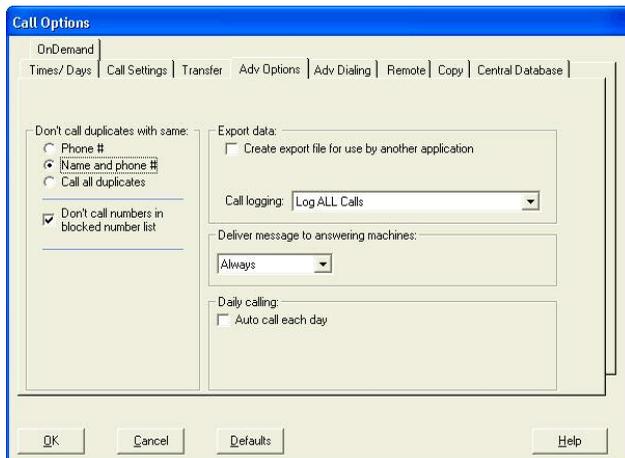
8c Click on the **Adv Options** tab.

Set the **Don't call duplicates with same** to **Name and phone #**.

Then, click **OK**.

9 Click on the **Wizard** icon from the top toolbar.

The Call Wizard allows many options for different types of messages (as opposed to using EasyCall). Here, you can create the standard recorded message or, add several different message options such as a Night Message. You can set up an e-mail message, multi-lingual message and even request a touch-tone response to your message.

This section covers three types of messages you can configure in the Wizard all at once; Standard, Multi-Lingual and E-mail. The instructions for each type of message have been separated for each screen. You can set up one type of message or all three at once using these instructions. Multi-Lingual does require the Standard message to be configured; Standard and E-mail alone do not.

At any point during the Wizard you do not understand a specific function or want more information, click the **Help** button.

9a **To set up a Standard Message**
Upon opening the Call Wizard, click **Next**.

To set up a Multi-Lingual Message
Upon opening the Call Wizard, click on **Check if you wish to create multi-lingual messages**, then, click **Next**.

To set up an E-mail Message
Upon opening the Call Wizard, click on **Check if you wish to send an e-mail message**, then, click **Next**.

9b **E-mail Message continued...**
Choose from one of the three choices for sending e-mail messages, then, choose to send either a simple text message or a constructed message. Then, click **Next**.
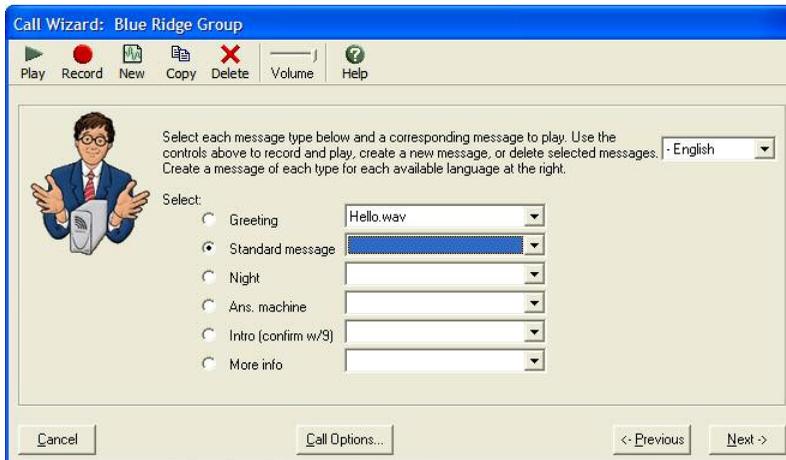

9c **Standard Message continued...**
Choose which message option(s) you would like to add in addition to your recorded message (*for detailed information on each of these options, click Help*), then, click **Next**.

Multi-Lingual Message continued...
Choose which message option(s) you would like to add in addition to your recorded message (*for detailed information on each of these options, click Help*), then, click **Next**.

9d **Standard Message continued...**

The message options chosen on the previous screen will determine which and how many drop-down boxes [i.e. Night, More Info] appear. Select the **Standard message** box. Then, from the top toolbar, click **New**. A box will appear requesting what type of message you want and a title for the message:

> **Single-part (linear) message (.wav)** - Choose this type if you do *not* want to use Flex Fields in your message.

> **Individually constructed message (.vft)** - Choose this type if you do want to use Flex Fields in your message.

Next, type in the title you wish the message to be called and then click **OK**. Repeat for any additional message options.
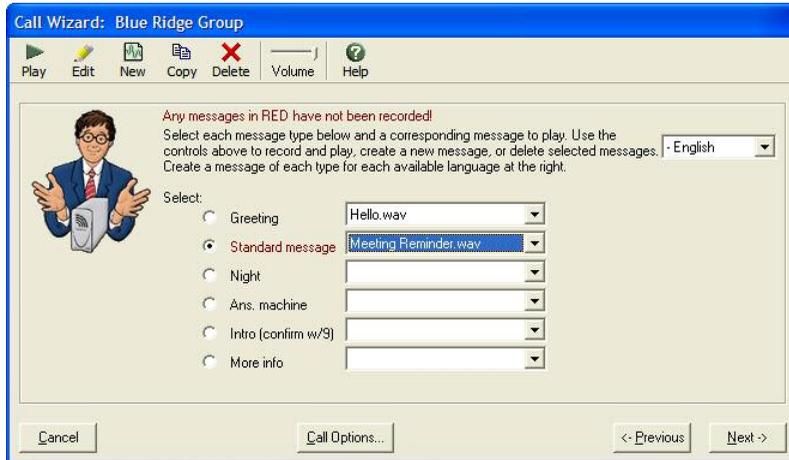
9e **Standard Message continued...**
If you chose **Single-part (linear) message (.wav)** as your message type:

To record a message option, click **Record** from the top toolbar and speak into the headset/microphone after you hear the beep. Click **Stop** when finished. To review what was recorded, click **Play**. Repeat for each message option. **When finished, click Next and proceed to page 80**.

If you chose **Individually constructed message (.vft)** as your message type:

Click the **Edit** button from the top toolbar. The next proceeding pages will walk you through setting up a message in the Constructed Message Editor.

Multi-Lingual Message continued...
First, change the language from English to a different language via the drop-down box in the top right corner. Then, depending on what type of message you chose for each message option, use the instructions listed above for the Standard Message and proceed accordingly.

Creating a Constructed Message (Individually Constructed Message (.vft))

Note: If you chose **Individually Constructed Message** for your message option(s), please proceed with these instructions. *If you chose Single Part (linear), please see the preceding page.*
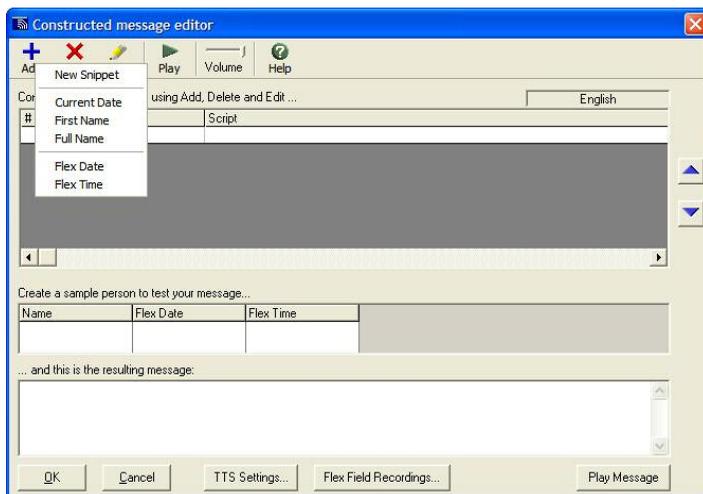
Upon clicking Edit from the previous screen, you are presented with the **Constructed Message Editor**. Here, you will assemble your messages in pieces rather than one single recording. This allows you to insert Flex Fields and other information into your message, so that everyone called by PhoneTree will hear their own unique and customized message.

To start, click **Add** and choose **New Snippet** and then double click on **Unrecorded Snippet**.

To help you understand how a constructed message really works, a sample message will be used.

For this example, the message that will be scripted will read as follows when pieced together: "This message is to remind **the north office** about our meeting on June 3rd. Please make sure you can attend, we will start promptly at 6pm. Thank you."

In the above sentence, "the north office" is our flex field and will change based on the location that each member on the call list is assigned to. The rest of the sentence, once scripted, will always stay the same. Remember that you can have more than just one flex field in your message, this example just shows one.

The first snippet should represent what needs to be said up until the flex field part of the message. For this example, the first snippet will be "This message is to remind." The same principle applies for your message. Start your message off with a snippet that stops where you want to insert a flex field.
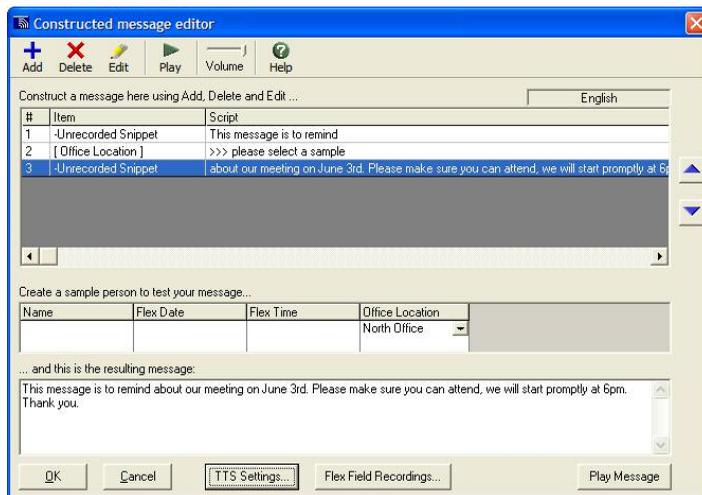
To record the snippet, click **Record** from the top toolbar. To review what was recorded, click **Play**. When finished, click **OK**.
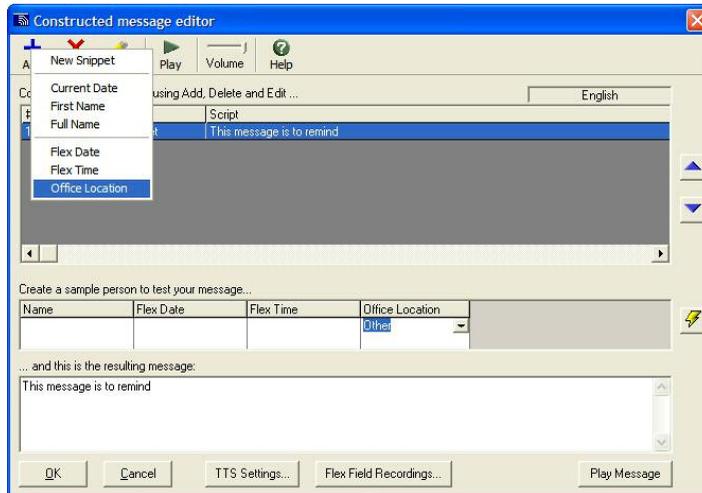
Now the flex field can be added to the message. Click **Add** and insert a flex field that you have already set up. For our example, this is where the Office Location flex field gets inserted.

Since the flex field has been inserted, we can add another New Snippet to complete the message. Click Add and choose New Snippet again, then double click on it to insert text. You will need to record the message after you have entered the text and click **OK** when finished. You can see in the above screen shot, we have done the same with our example message.

It is now time to edit your flex fields. For our example, we will show you how we edit our Office Location flex field. Click **Flex Field Recordings**....
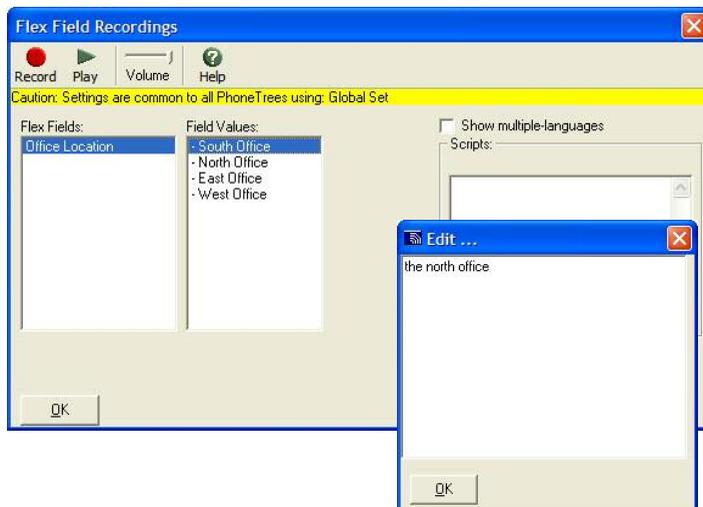
To edit a flex field, first click on the name of the flex field and then under the **Field Values** box select an entry for that flex field. For our Office Location example, we have four different offices: South, North, East and West.

Once you have selected which flex field entry you want to edit, click on the **Scripts** box. An edit box appears. Type in the text that the flex field should insert in the message, then click **OK**. For our example message, we say "in our North office" for the North Office entry, because this is the section of the message that the flex field is inserted. The other flex field entries would be scripted the same way so when a different member on the call list has a location other than the North office, the flex field within the message changes seamlessly.
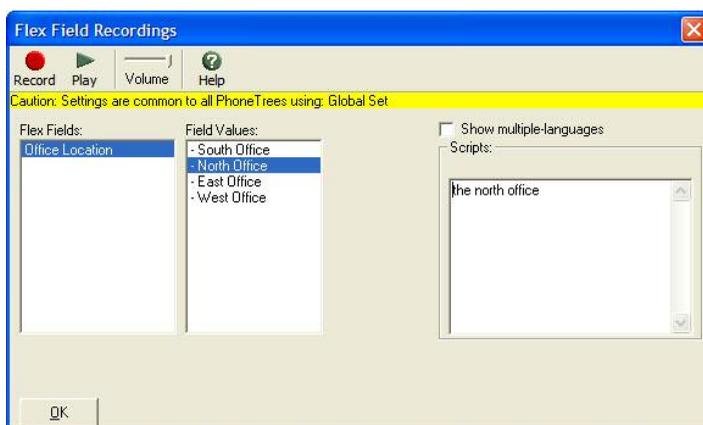
Once all entries have been scripted, you can record them. First, click on the entry that you want to record and then click **Record** from the top toolbar. Press **Play** to review what was recorded.

If you are also setting up a multi-lingual message, check the **Show multiple-languages** box and repeat the scripting and recording process for each language.

When finished, click **OK**.
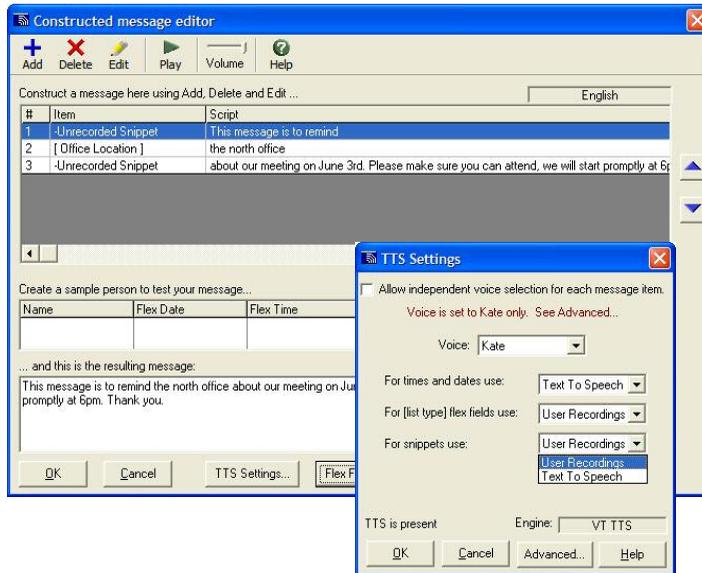
This completes our example message. At this point, both snippets and all of the flex field entries have been recorded.

You do have the choice of using your voice recordings to play back the message or switching to Text-to-Speech. If you would like to switch to Text-to-Speech, click **TTS Settings**... and then click **Help** for more information on how to use this feature.

Click **OK** to exit the Constructed Message Editor.

Note: If you have selected other message options to be Individually Constructed Messages as well, you can use these same instructions to create those messages.
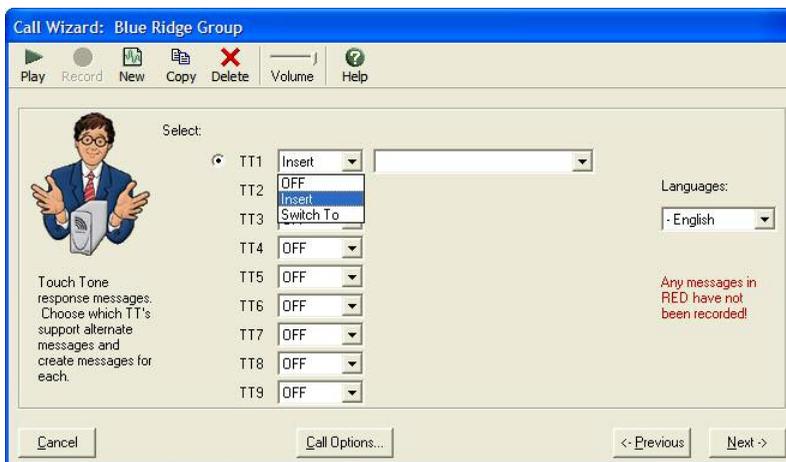
9f **Standard Message continued...**

If you chose **TT Response** as a message option, you will see this screen. The touch tone reply numbers you choose here should coincide with what you mention in your message *(for detailed information on how to set up a touch tone reply, click the **Help** button from the top toolbar)*. When finished, click **Next**.

Multi-Lingual Message continued...

If your multi-lingual messages use the touch tone reply feature, you will need to record those as well. First, change the **Languages** drop-down box from English to a different language, then proceed with recording the touch tone replies as with the English message. When finished, click **Next**.
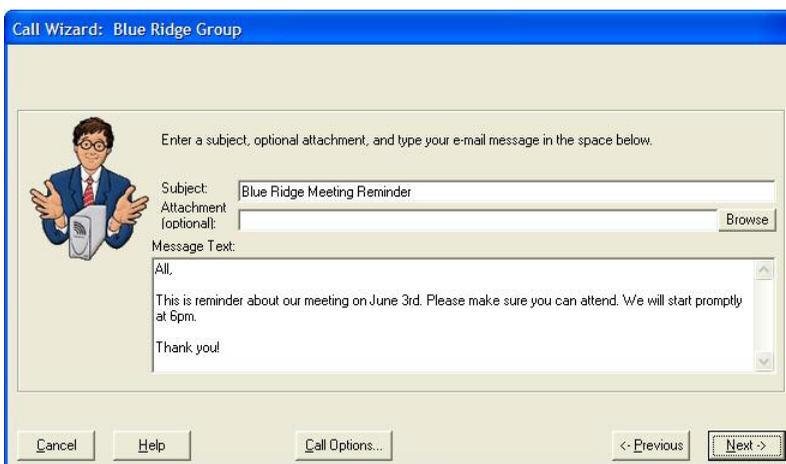
9g **E-mail Message continued...**

Enter a subject and message for your e-mail here. If you wish to send an attachment, click the **Browse** button to locate and include it with the e-mail. When finished, click **Next**.

Note: If you chose a constructed message for your email message, please click **Help** for instructions on how to use that feature.
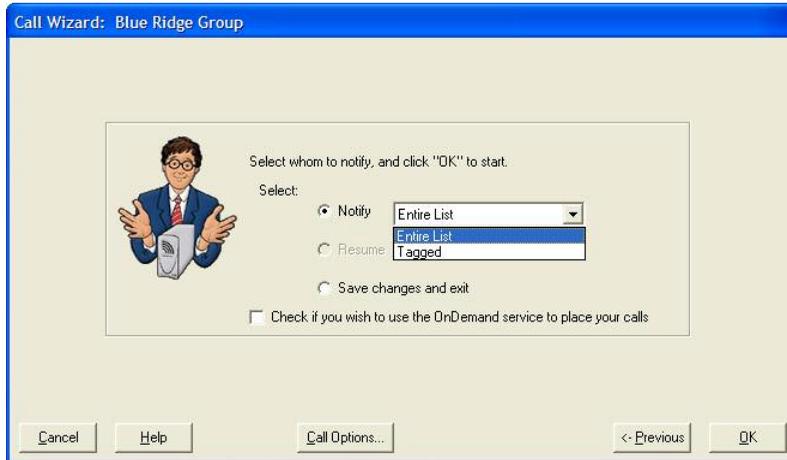
9h **All Messages**
In the **Notify** drop down box, either choose the **Entire List** view (all members will be notified), or any custom view you have set up or **Tagged** (only the members checked on the call list will be called). Then, click **OK** to launch your call job.

Once you press **OK**, the **Confirm Start Job** window will appear showing how many people you are about to call and asking if you wish to continue. If you are ready to start your calls, click **Yes**. If you click **No**, you will exit the Call Wizard completely.

After you click **Yes**, this will launch the **Call Center** for the 3500 or the **OnDemand Packager** for the 3500 SE.

For information on what the Call Center is and how it functions, see page 83.

For information on how to initiate the OnDemand Packager, see pages 123-124.

If you would like to generate a report showing your call results once your calls are finished or configure PhoneTree to automatically do this for you, turn to page 87.

Notes

Call Center

Call Center

Once you have initiated your calls from either EasyCall or the Call Wizard, the PhoneTree software will launch the Call Center. The Call Center is where phone calls actually take place. In addition to making calls, the Call Center is also utilized for features like AutoReports and Auto Tasks.

In order for the Call Center to make or receive phone calls, it must be running during your preset call times. This means that you can minimize the Call Center while it is making calls – just don't close the software!

While the Call Center is operating, you will need to know the functionality of some of its features:
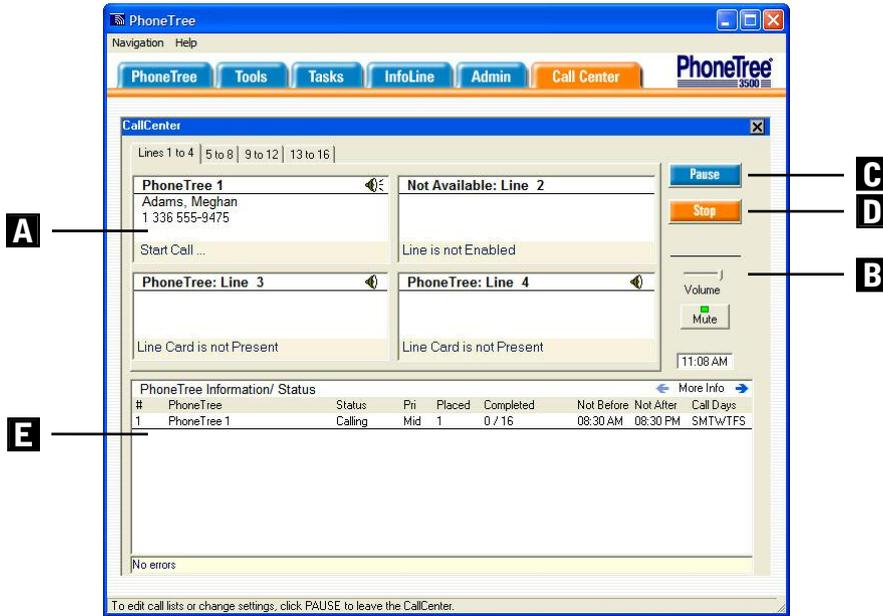
The Call Center provides a dynamic call status:

A. Call Status Boxes: Each box shows the status of an installed phone line (four at a time). The contents of each box change as calls progress. Click the Speaker icon in the top right of any box to monitor calls for that line.

B. Volume Control Slider: Use to adjust the volume of the speaker while calls are being made. Click the Mute button if you do not want to hear calls in progress at all.

C. Pause Button: Use to stop calling. In-progress calls are finished before returning to the Main Menu. You can return here to finish the call job later by clicking the Resume Calls button.

D. Stop Calls Button: Use to stop calling immediately. In-progress calls are interrupted and you will be taken back to the Main Menu. You can return here to finish the call job later by clicking the Resume Calls button.

E. Job Status Window: Provides summary information about the calling session in progress. Click on the More Info Arrows to see additional summary information.

Call Statuses:

Every member on a your call list receives a call status. Below is a listing of every call status and its definition. You can view the call status either by opening the call list under the PhoneTree desktop or by reviewing your report (see page 87).

Completed Call Statuses (message delivered)

Ans by Person	Message was delivered to a person
Ans by Machine	Message was delivered to a person's answering machine
Ans by +Machine	Message was delivered to a person's answering machine after a definite beep was detected by PhoneTree
Ans by Pager	Message was delivered to a person's paging device
Call Transferred	Person transferred by pressing "0"

Uncompleted Call Statuses (PhoneTree will re-attempt to deliver message)

Busy	Phone was busy on last call to person
Not Called Yet	Person has not been called yet
Learned Machine	Person's answering machine is "unique" and was learned
No Answer	Person did not answer last call
9 Not Confirmed	Did not confirm delivery when asked to dial "9"

Final Call Statuses (PhoneTree will not re-attempt to deliver message)

Hung Up Early	Call was answered but responder hung up before message finished
Busy After Voice	Telephone company busy or off-hook service message
Max No Answers	Line was busy or not answered for max attempts (up to 15) set by user [2100: see 8b on page 46, 2500: see 8b on page 57, 3500: see 8b on page 71]
Not Accepted	Did not confirm delivery (by pressing "9") after 3 call attempts

Not Selected Call Statuses

Not Selected	Person is not selected for calling
Removed as Dup	Person was removed from the call list by checking one of the options on the Advanced tab of the Call Options dialog [2100: see 8c on page 46, 2500: see 8c on page 57, 3500: see 8c on page 71]
Blocked Number	Person is on the master Blocked Number list (see page 172)

Error Call Statuses (please check the phone number)

Call Failed!	Error detected during call (check for disconnected/changed number)
OGM Too Long	Call was answered by a machine, but its OGM (outgoing message) was too long
Telco Message	Call was answered with a telephone company (Tri-Tone) S.I.T. tone (disconnect/change)
No Connect	No signal detected after dialing (phone number is probably not valid)
Fax or Modem	Call was answered by a FAX machine or modem

In addition to the call statuses, a number may appear to the right of the status, in the Replies column. This indicates a TouchTone was pressed by the person during the call:

0   Indicates call was transferred to a voice mailbox or other extension on your phone system. See the Transfer tab of the Call Options dialog.

1 thru 9   Meaning will vary depending on message. you may request that the person respond to a question with any touch-tone digit (ie, press "5" if you can come to this Thursday's meeting, press "3" if you need transportation, etc...)

Reports

Reports

After your call job has completed, you have the option of creating a report showing the results of those calls. PhoneTree offers an array of reports that show various data regarding your calls. Also, you have the option of either creating the reports manually or configuring PhoneTree to automatically do it for you. There are four choices for creating a report: **print**-**out**, **file export**, **e-mail** (AutoReport only) and **fax** (AutoReport only).

Manual Reports:

a) Go to the PhoneTree desktop and click on the PhoneTree icon you wish to generate a report for.
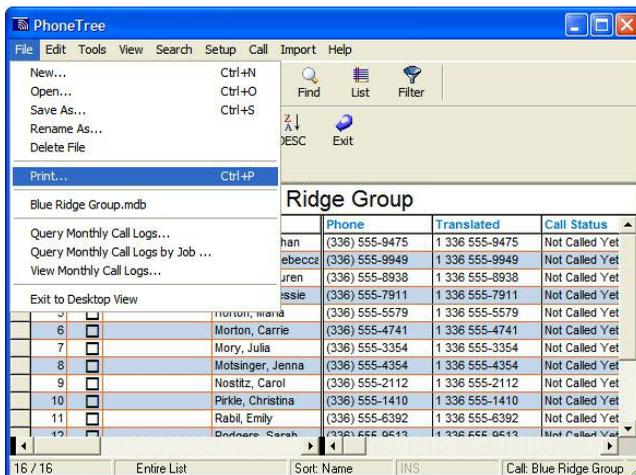
b) Click **File** and choose **Print** (or click the Print icon from the toolbar).

c) The **Make Print Selections** window appears. Here, you can use the **Report format** drop-down box to select which report you would like to use.

To preview the layout of each report, click **Preview/Export**.

To print a report, select the report you want and click **Print**. To make sure your report goes to the correct printer, click **Setup** to select a printer.

To export your report to a file instead of printing it, click **Preview/Export** to open a preview of the report.

Click the Export icon.
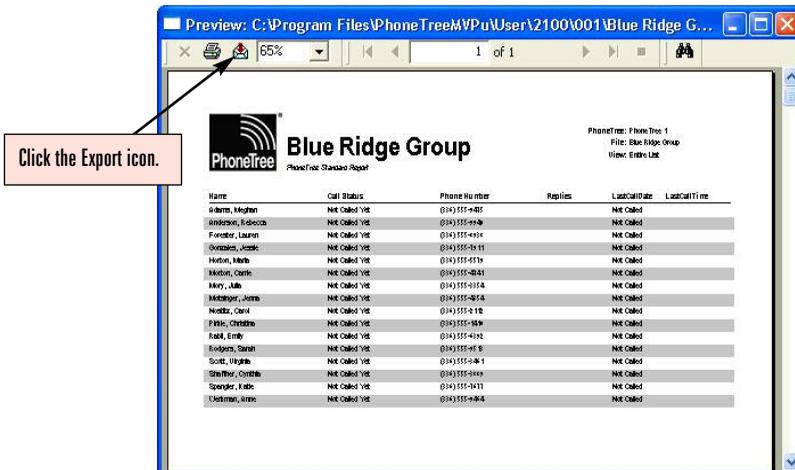
d) At the top of the preview screen, click on the **Export icon** (blue envelope with red arrow).

The **Export** window appears. From the **Format** drop-down box, choose the file format then click **OK**. You will be asked where you would like to save the file. Make sure you choose a location that is easy to locate such as your Desktop.
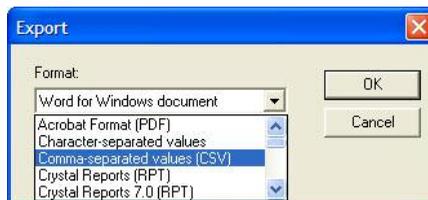
Reports: AutoReports

AutoReports:

AutoReports allow you to generate your call result reports automatically, instead of manually, after your call job(s) have completed.

a) Go to the PhoneTree desktop and click the PhoneTree icon you wish to generate a report for.

b) Then, click **Setup** and choose **Autoreport...**
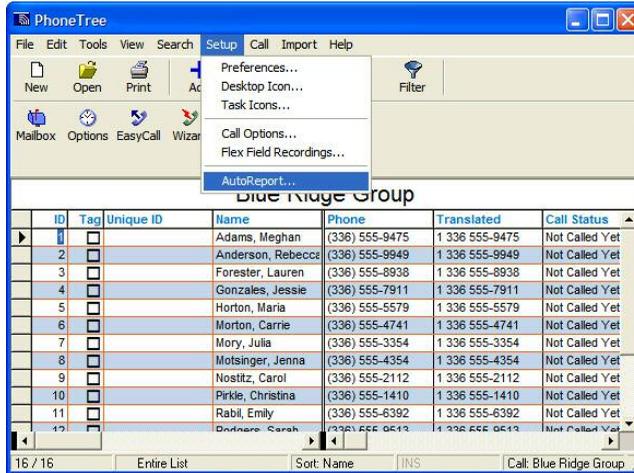
The **Setup AutoReports** window opens. Click **Add**.
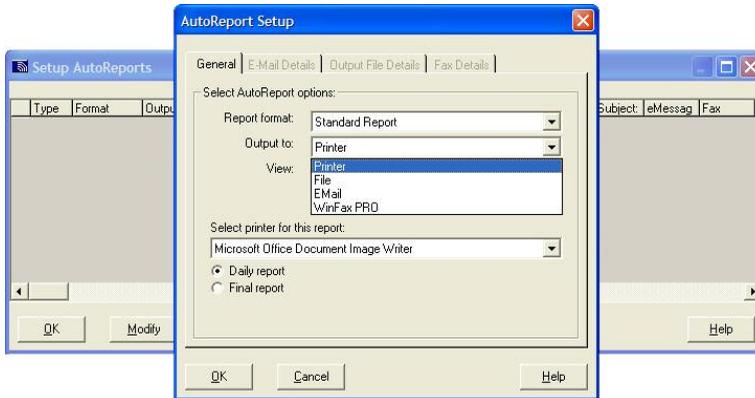
c) The **AutoReport Setup** window opens. There are four different types of AutoReports that PhoneTree can generate: print-out, file export, e-mail and fax *(requires WinFax PRO software – see below)*. Also, you can set up more than one AutoReport to run at a time, so if you wanted the report printed and e-mailed, you would need to set up an AutoReport for each type. Below is a description for each field for this setup:

Report format: List of different report templates available. (to preview the layout of each report, see **Manual Reports** on page 88).

Output: List of different output options for the reports. Each output option varies in setup. Click **Help** for more information.

> **Printer** - Sends the call results to a printer of your choice.

> **File** - Generates the call results into one of several file formats to a path designated by you on your local computer or network.

Email - Sends the call results as an attachment from one of several file formats. Requires you to enter your e-mail server information. See page 32 for more information.

WinFax PRO - Sends the report via fax machine. Requires installation of WinFax PRO software [not sold or supported by PhoneTree].

View: Choose which view you want to represent the report. This is a useful option when custom views have been created with special sorting properties. The report will obey any sorting or filtering rules set for a custom view (see page 103).

The report can be processed automatically, at the time you specify in **Configure Global Settings** under the **Misc** tab (see page 29), by one of two ways:

Daily Report - This report will generate at the same time regardless if the call job is complete.

Final Report - This report will only generate when the call job is complete or the call times have expired.

d) After all options have been set, click **OK**. Then, click **OK** to exit the Setup AutoReports window.

Notes

Tasks

Tasks

Tasks allow you to string together several commands for a single application and complete them all with a single click on the Tasks Desktop. In addition, you can set an AutoTask to be triggered at a certain time or by the appearance of the creation file. In this case, you wouldn't need to click an icon on the Tasks Desktop to initiate the task – it would start automatically.

Creating a Manual Task:
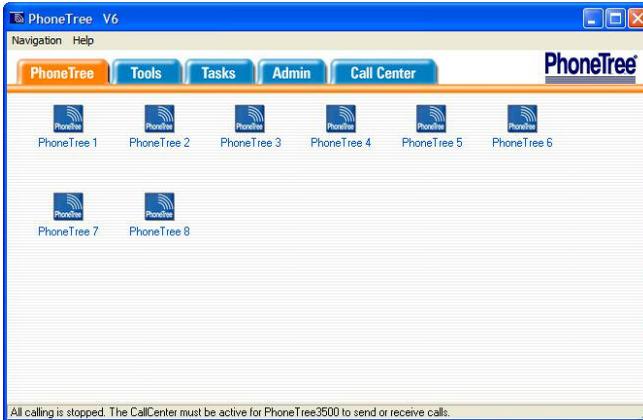
a) On the PhoneTree desktop, choose the icon for which you would like to create an Task. This takes you to the List Editor for that icon.
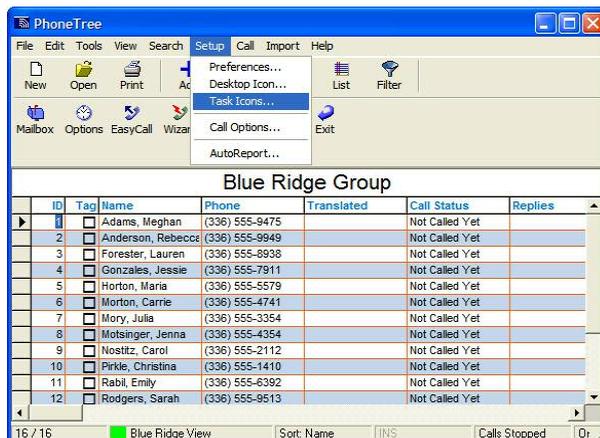
b) From the **Setup** menu, choose **Task Icons**...
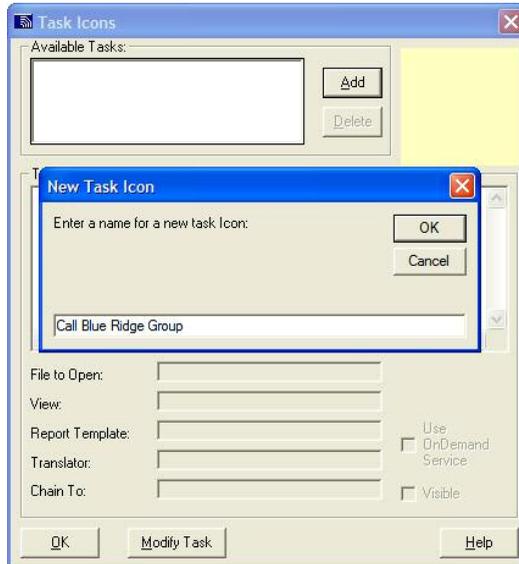
c) Next, click the **Add** button, then enter a name for your new Task Icon, and click **OK**.
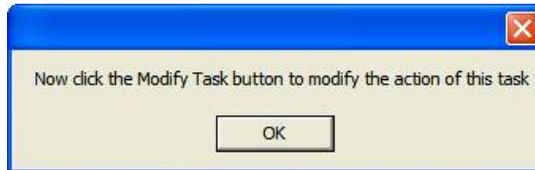
d) Click **OK** on this screen. Now click the **Modify Task** button.

e) Under the **Edit Icon** tab, choose an available icon from the list on the left, then type in a name in the **Enter a name** box. Next, click the **Edit Task** tab.

f) Click the **ADD a command to script** button. Choose **Import**, then **File**.
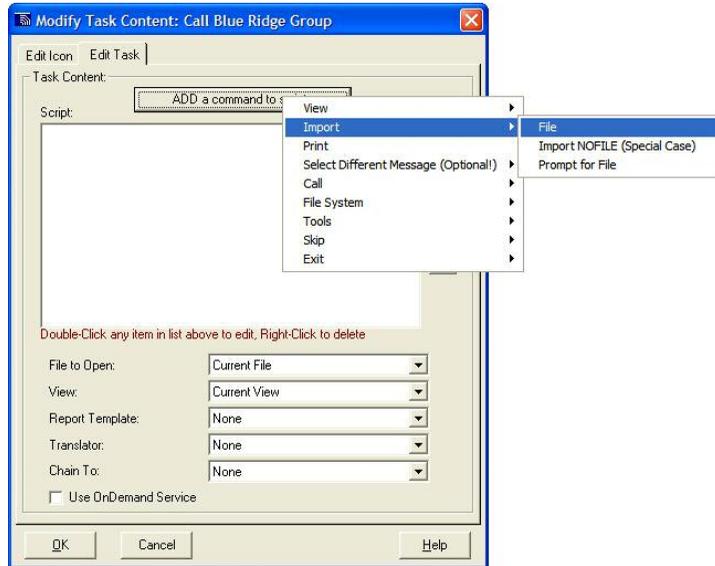
g) Click the **Yes** button.
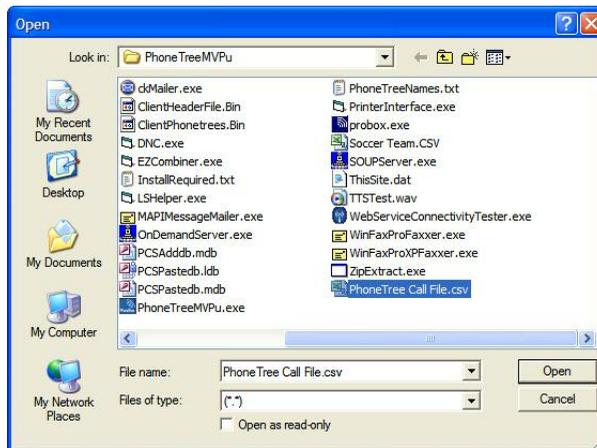
h) Specify the file PhoneTree should look for every time this Task is initiated. When you have found and selected it, click **Open**.
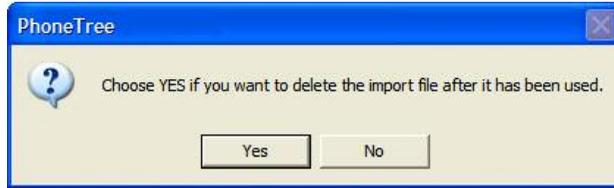
i) Make the appropriate choice on this box (**Yes** will delete the import file after use, **No** will preserve the file).
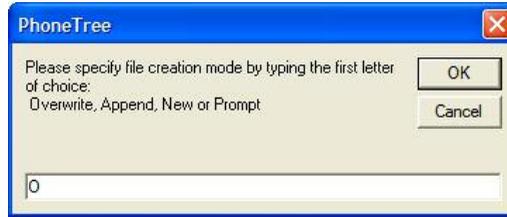
j) Choose whether the creation of this file should **Overwrite** the existing file, **Append** to the existing file, create a **New** file or **Prompt** (ask each time for a choice) by typing in the first letter of your desired operation. ("**O**", "**A**", "**N**" or "**P**"). "**O**" is recommended.
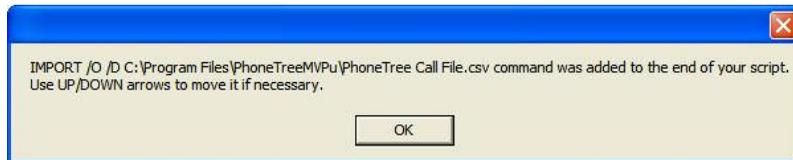
k) Click **OK**. Now your Import command shows up in the Task Content window of the Modify Task Icon screen.
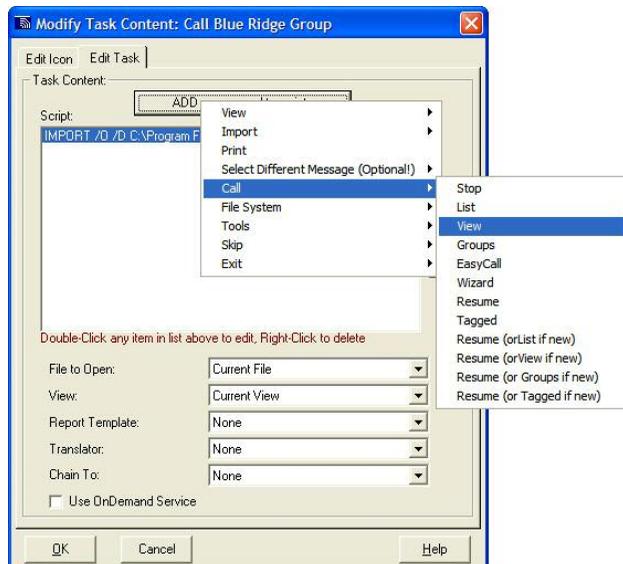
l) Now click the **Add command to script** button again, and choose **Call ▸ View**.
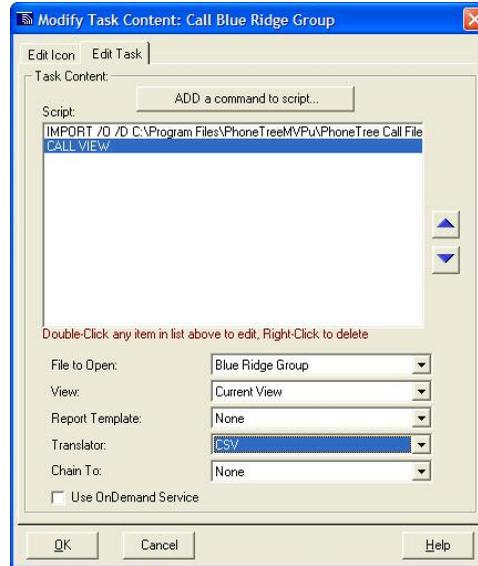
m) Click **OK**.

n) Make sure your view, whether custom or Entire List, is selected in the **View:** drop-down menu and **CSV** (or your other translator) is selected in the **Translator** drop-down menu, then click **OK**.

o) Repeat this process for any other Task Icons you would like to create, then click **OK**.
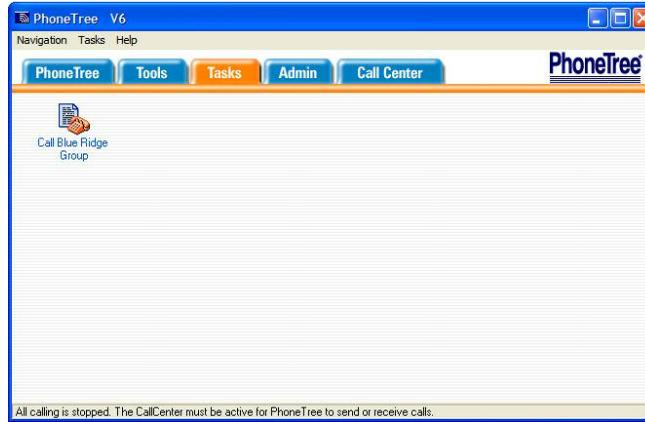
The Task icons you've created will now appear on the Task desktop, and when you click an icon, PhoneTree will execute the commands you selected for that Task.

Automating a Task:
Suppose you set up a Task and you need to click the icon every day to initiate the actions associated with that task. But what if you will be out on vacation for the rest of the week and you still need to make calls (or print a report, etc.) each day?

PhoneTree allows you to initiate the actions of a Task automatically, based on a trigger you set (like a certain time of day, or the appearance of a certain file). Once this is set up, the task will run automatically *only if PhoneTree is in the Call Center* (like all other automated features). Here's how to do this:
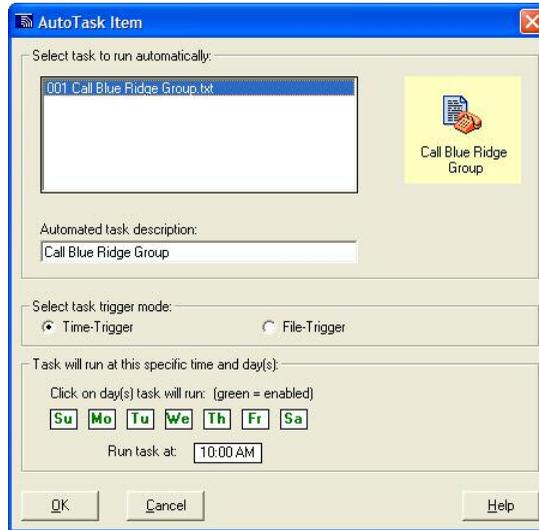
a) From the Admin Desktop, click the **AutoTask Manager** icon.
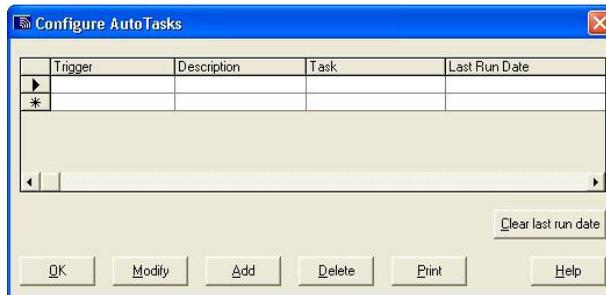
b) The **Configure AutoTasks** dialog appears. Click the **Add** button.
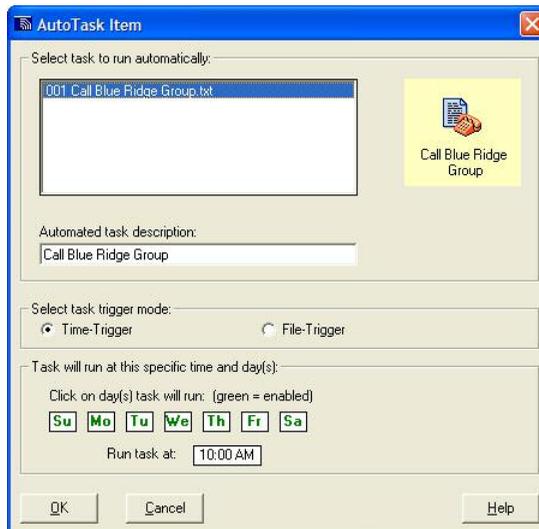

c) A list of the configured Task icons will appear. Select the one you would like to automate from the list. Type a description directly in the **Automated Task Description** box. The task you selected will now be displayed in the upper right corner.

d) Next, decide which type of **Trigger** you want to use to initiate this Task – either a **Time Trigger** (PhoneTree will activate the task at the time you designate) or a **File Trigger** (PhoneTree will activate the task whenever it detects the presence of a file whose location you designate). Choose the appropriate radio button for either a Time Trigger or a File Trigger.

For a **Time Trigger**, click the days you want in the Time Trigger box (the selected days will be shown in green). Click on the Time to change it (a pop-up box will appear allowing you to make changes). When you are finished specifying the day(s) and time, click **OK**. You will see the day(s) you selected and the time appear next to the name of the tasks in the list under the Trigger column.
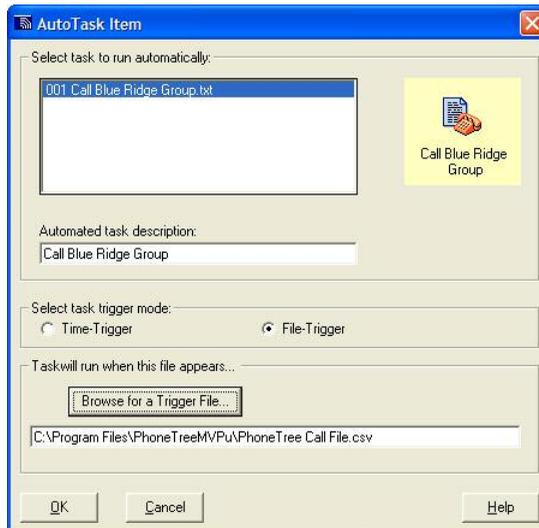

e) For a **File Trigger**, you will show PhoneTree where to find a file that will be placed in the same location each time it is updated (PhoneTree will use this file when completing the Task you have set up). Click the **Browse for a Trigger File**... button. Then locate your file by navigating to it with the Locate Trigger File dialog. Click **OK** when done. *Be aware that when using the File Trigger, your source file will be deleted.*
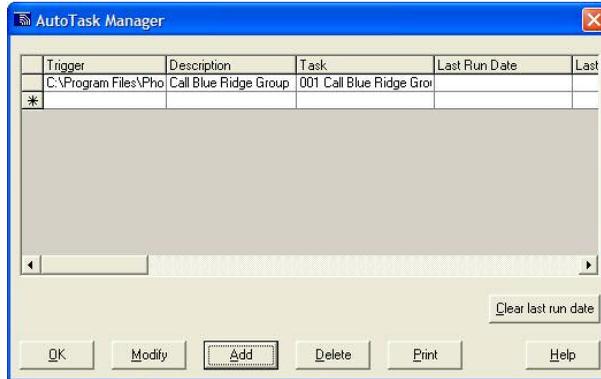
f) Now, back on the Configure AutoTasks screen, you will see that the file pathname (or the days that you selected and the time for a Time Trigger) is shown in the Trigger column. Click **OK**. This Task will now be performed automatically without your needing to click its icon on the Tasks Desktop.
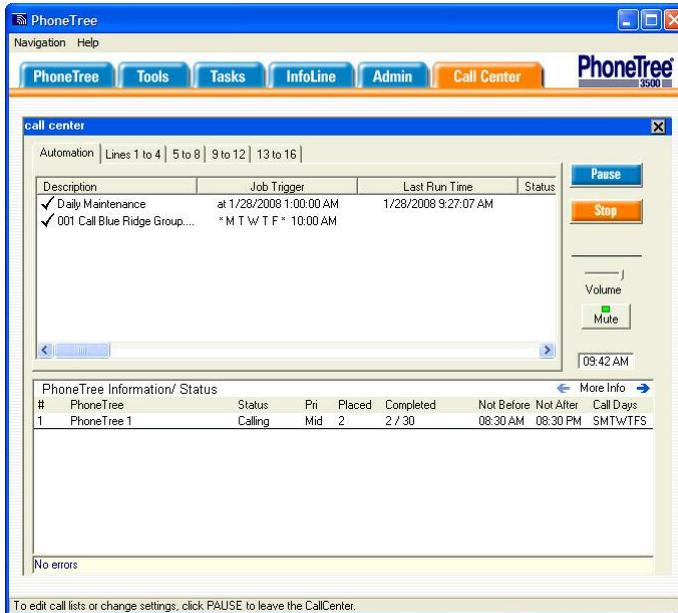

g) When you return to the Call Center after creating an AutoTask, you will see information regarding your AutoTask(s) and Daily Maintenance appear in the **Automation** tab.

Views

Views

The View feature allows you to pick and choose which fields you see on your call list, as well as sort or filter your call list, based on a number of different criteria. By default, the Entire List view is loaded for every new PhoneTree icon. While Entire List contains the basic columns such as Name, Phone Number, etc., it does not contain special fields such as Flex Fields. This section will walk you through creating your own view so you can select what data you need to see and even filter out certain data within a field if you choose. Keep in mind, you can always create more than one view per call list if needed. **Note:** With whatever view you use, that same exact view will not translate on any reports you generate, since those reports are created by preset templates and may or may not use the same fields.
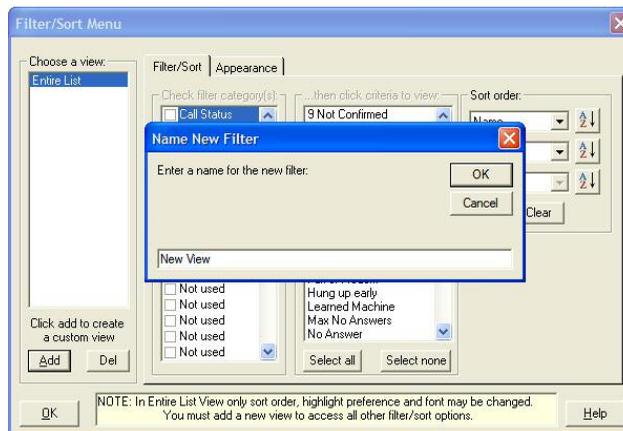
Creating a Custom View:
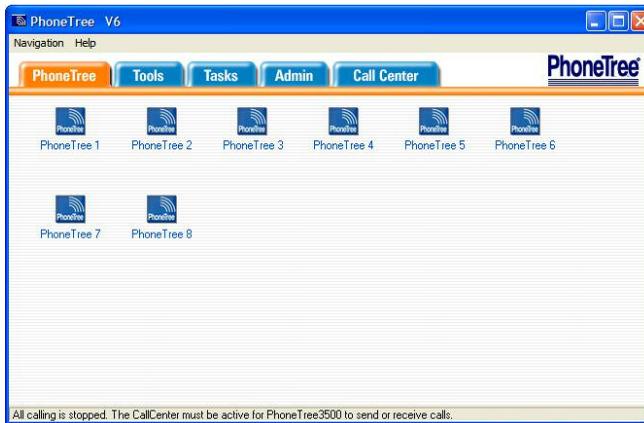
a) Start by going to the PhoneTree desktop and choosing the icon for which you would like to create a custom view. This takes you to the List Editor for that icon.
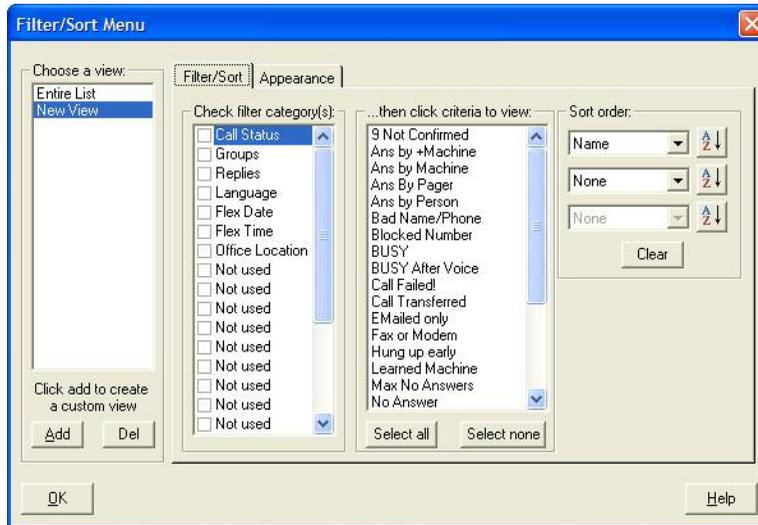
b) Click on the **Filter** icon from the top toolbar.

c) The **Filter/Sort** Menu appears. Click **Add**. You will be asked to choose a name for the new view. Type in a name and then click **OK**.

d) The **Filter/Sort** tab allows you to filter out certain entries in for certain fields. For instance, the Call Status field shows a list of all possible call statuses. If you wanted to only view certain call statuses, you could check the Call Status box and in the next column choose which statuses you wanted to view. Any member that falling under a call status that is not selected would be removed from the new View, but not the call list. To see everyone again, choose Entire List from the View menu.

Also, to sort your call list by a certain field, choose up to three different fields and the order to be arranged in under **Sort Order.**
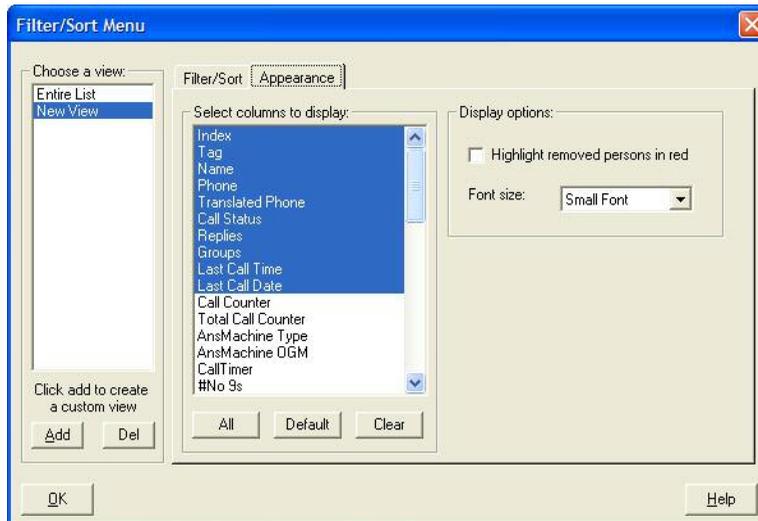
e) The **Appearance** tab allows you to select which fields you want visible in your view. Click to select a field. Click again to deselect. When finished. click **OK**.

Notes

Remote Operation

Remote Operation

Remote Access lets you call in to your PhoneTree system and access most major functions, including recording your message, selecting whom to call, changing the calling times, and more.

Enabling Remote Operation:
1. On the PhoneTree Desktop, determine which PhoneTree icon(s) to call remotely. If you choose to enable this feature for all of your icons, repeat steps 2-7 for each one.

2. Next, identify and make note of the icon's number (hover mouse pointer over the icon and the number will appear, e.g. "PhoneTree 001").

3. Go to the List Editor (click on the desired PhoneTree icon).

4. Click **Options** icon from the top toolbar, then click the **Remote** tab.
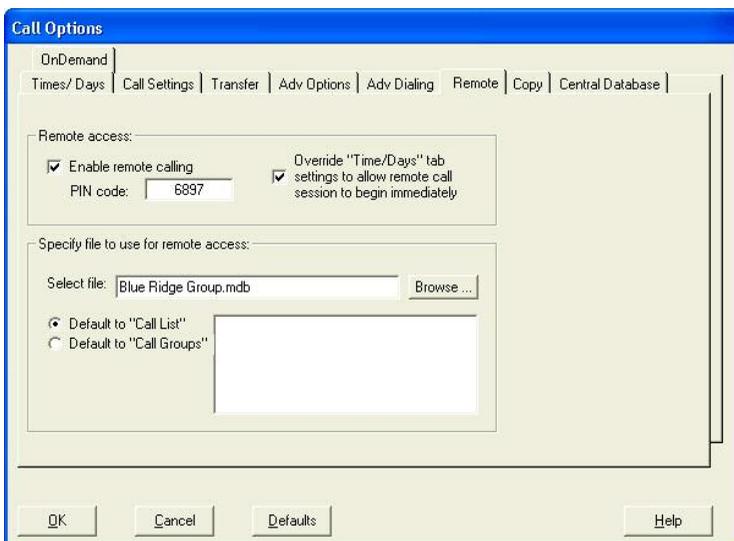
3. Under **Remote access**, check **Enable Remote Calling**.

4. Enter a **PIN code** for user access to the Remote feature (required).

5. Check the **Override "Time/Days" tab settings to allow remote call session to begin immediately** box only if you know that you will want to use Remote Operation outside the preset call window settings you entered on the **Time/Days** tab.

6. To select the **Calling List** file to be used when PhoneTree calls remotely, click the **Browse** button to select a file from your computer's hard drive (the Lists available to PhoneTree will appear in the box at right). **Note:** This file must be selected in advance (i.e. now, while using this tab) and will be used for remote calling regardless of which file was last loaded into PhoneTree.

7. Select the default call mode from **Call List** (call the entire List) or **Call Groups** (call one or more Groups in the List). This can be changed when you call in using the Remote Menu.

Click **OK**.

**Enabling a Line as a Call-In Line**:
From the Admin desktop, click on the **Configure Phone Lines** icon.
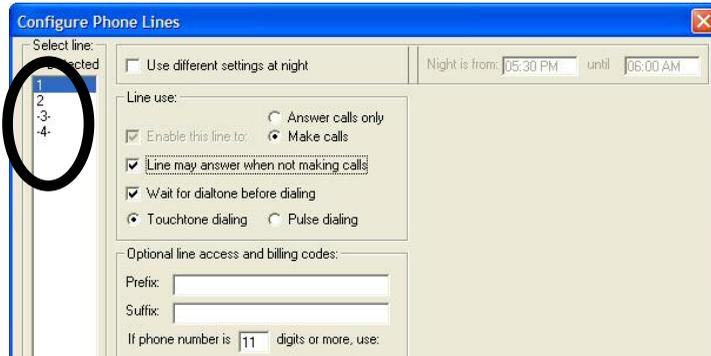
Under **Select line**, choose one or more of the available line(s) to be used as call-in line(s) from the list on the left.

In the **Line Use** area, select **Make calls** if the line will be used to *place calls* and check "Line may answer when not making calls" if you want the line to automatically switch to being a call-in line whenever it is not being used to make calls. With this method you may not be able to call-in on this line while calls are being made. Select this option if you have *only one* line installed. Select **Answer calls only** if the line will be used *only* for incoming calls, like Remote Access (or InfoLines or the Answering Machine feature, page 33).

Make a note of the phone number associated with this line so you can access it when calling remotely.
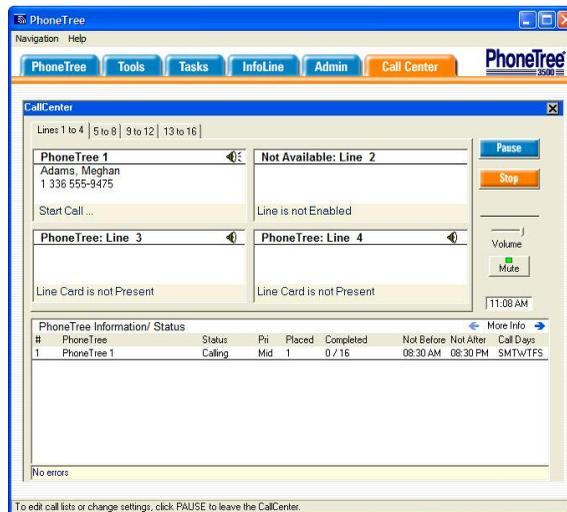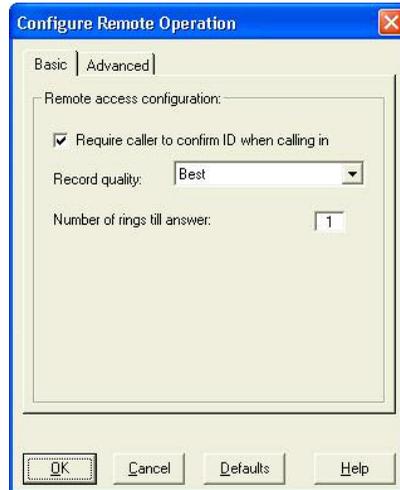
Note: Make sure you leave the PhoneTree software in the Call Center in Calling Mode (see page 84). If you attempt to call in from another phone and PhoneTree is not in its Call Center, you will not be able to use Remote Access.

Configuring Remote Options:
From the Admin Desktop, click on the **Configure Remote Operation** icon.

Check **Require caller to confirm ID** when calling in if you want PhoneTree to verbally confirm your Remote PIN Code (ID) prior to granting access to the Remote Menu (recommended).

Leave the **Record quality** set to **Best** for your recordings (choose **Economy** or **Middle** *only* if hard drive space is an issue).

Set the **Number of rings till answer** to determine how long the Remote feature should wait before answering.

Note: The values under the **Advanced** tab do not need modification unless you are directed to do so by PhoneTree Customer Support. Click **OK**.

Calling In

When calling in you **must** select your PhoneTree by typing in its icon number, and then enter the appropriate PIN code. **Example:** To select PhoneTree 001 with PIN code 5678:

a. Call in to your PhoneTree system and wait for an answer
b. At the voice prompt press [*] [1] [#] on your touch-tone keypad*
c. Press 1 to confirm your selection (or press 2 to try again)
d. Enter your PIN Code [5] [6] [7] [8] [#]
e. You will be greeted with the Remote Main Menu (see below)

PhoneTree Remote Menu

(Some items play only if enabled)

[1] *Message Menu*

[1] Record Message
[2] Play Menu
[3] Record Introduction
[4] Play Introduction
[5] Record More Information

[6] Play More Information
[7] On/Off Introduction
[8] On/Off More Information
[*] Repeat Menu
[#] Main Menu

[2] *Call Menu*

[1] Call List
[2] Call Group(s)
[3] Resume Calls†
[4] Say Call Mode
[5] Clear Groups†

[6] Add Groups†
[7] Delete Group†
[8] List Groups†
[*] Repeat Menu
[#] Main Menu

[3] *Mailbox Menu*

[1] Previous Message
[2] Current Message
[3] Next Message
[5] Delete Current Message

[8] Play Outgoing Message
[9] Record Outgoing Message
[*] Repeat Menu
[#] Main Menu

[7] *Time Menu*

[1] Say Settings
[2] Enter Don't Call Before:
 [1] AM   [2] PM
[3] Enter Don't Call After:
 [1] AM   [2] PM

[*] Repeat Menu
[#] Main Menu

[8] *Exit & Call*

[1] Call All Selected
[2] Resume Calling
[3] Call Using OnDemand^
[*] Repeat Menu
[#] Main Menu

[9] *Quit (No Call)*

[*] *Repeat Main Menu*

*PhoneTree plays the Standard InfoLine Greeting and requires you to press the Star (*) key to identify you as a Remote user and to prevent unauthorized use of your Remote system.

^Requires an active OnDemand account and the OnDemand option must be enabled in EasyCall or the Call Wizard (see pages 114, 121 and 125).

Remote Operation, continued

† The GROUP menu items are not played unless Call Group is selected. Also, since there are 36 groups to choose from, the following table may be of assistance in selecting the proper group(s) to call:

0=0	10=A	20=K	30=U
1=1	11=B	21=L	31=V
2=2	12=C	22=M	32=W
3=3	13=D	23=N	33=X
4=4	14=E	24=O	34=Y
5=5	15=F	25=P	35=Z
6=6	16=G	26=Q	
7=7	17=H	27=R	
8=8	18=I	28=S	
9=9	19=J	29=T	

If you try to access your PhoneTree remotely and:

Your PhoneTree is currently calling:
• You will be asked to "Please wait"
• Once the calling has stopped, you will be asked to select:
  [1] To stop the current call session
  [2] To Exit and allow calls to resume

Note: You will interrupt any calls in progress and the call job you enable remotely will be initiated instead.

Your PhoneTree is not remote enabled:
• You will be instructed to use the PhoneTree software to enable Remote Operation.
• This must be done in advance from the PhoneTree computer and may not be done remotely.
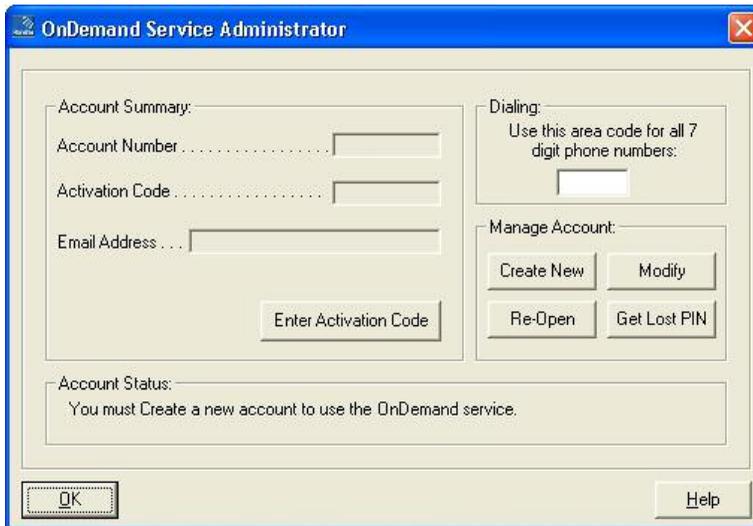
OnDemand

OnDemand

To use PhoneTree OnDemand, you need the following components in addition to the requirements found in the Check System Requirements section (see page 8):

- Correctly-configured internet connection (high-speed connection preferable but not required)
- External PC speakers and microphone (headset included with purchase)
- A valid e-mail address for each account and for each user you wish to create
- If you are using the OnDemand service with the PhoneTree hardware connected, your PC must have an internal sound card for recording and playback of messages.

Setting Up an Account:

1 Launch the PhoneTree software. Click the Admin tab. Click the **Configure OnDemand Service** icon.

2 Click the **Create New** button.

2a Read the Terms of Service, and click the box next to **I accept the terms above**.
Click **Next**.

2b Fill out the form that follows (items in red are required fields). A valid e-mail address is required to use PhoneTree OnDemand. Choose a four-digit account PIN, type in a **Promo Code** if you have one, then click **Next**.
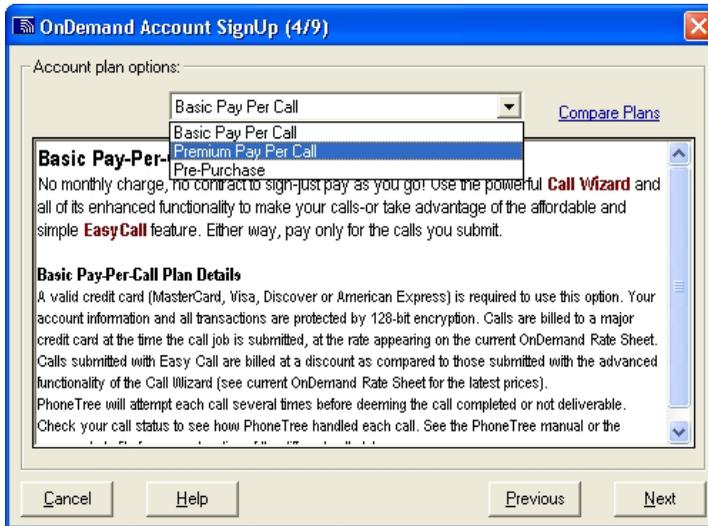
3 Read the descriptions of the available OnDemand account plans (switch from plan to plan by choosing a plan in the drop-down box at the top of the window). Choose a plan that fits your organization, then click **Next**.
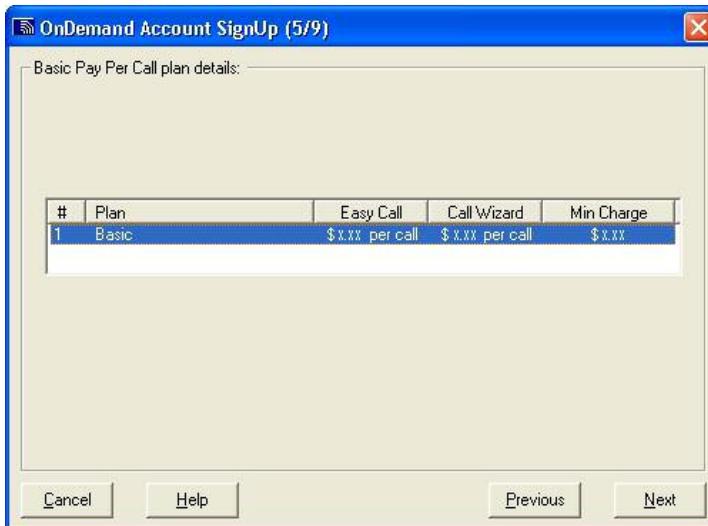
3a This next screen summarizes the current rates for the plan you selected. To continue, click **Next**.
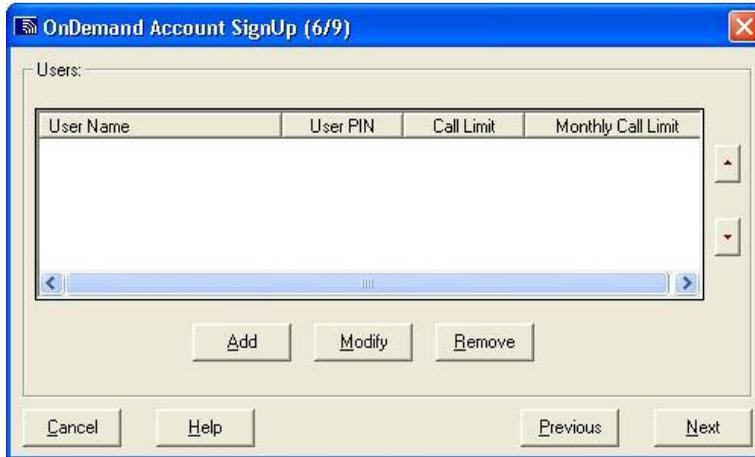
4 On this screen, you have the opportunity to create users for this account. You must create at least one user for an account. Your users will have the ability to place calls that will be charged back to this account, but you (as the account administrator) can limit how many calls they are able to place (both as a total user limit and as a monthly limit). Click the **Add** button to create a user.
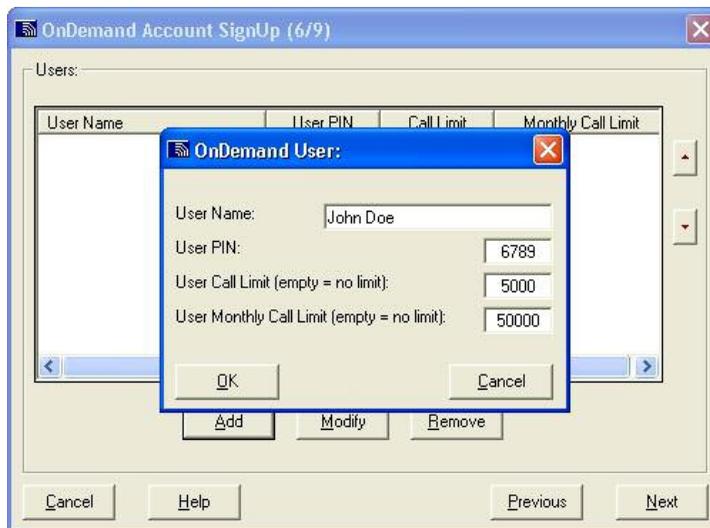
4a Type in the user's name, assign a **User PIN** (not the same as the account PIN – users will need to type in their own User PINs before being allowed to place calls), and set a **Maximum Job Size** and/or a **Monthly Call Limit** if desired. Click **OK**. Repeat for other users you wish to create then click **Next**.

5 Enter the cardholder's first and last name, then choose the **Payment Method** (Visa, MC, AMEX or Discover) from the drop-down box. If the credit card address is different from the address you entered in Step Two, un-check the box next to **Credit Card Address is same as contact address** and enter the address expiration date (month then year), then click **Next**.

6 This screen summarizes the options chosen for the account you are about to create. If the information is correct, click **Submit**. To go back and make changes, click **Previous**.

6a Now, using your regular e-mail program, check for a new e-mail message for the account you typed in Step Two.
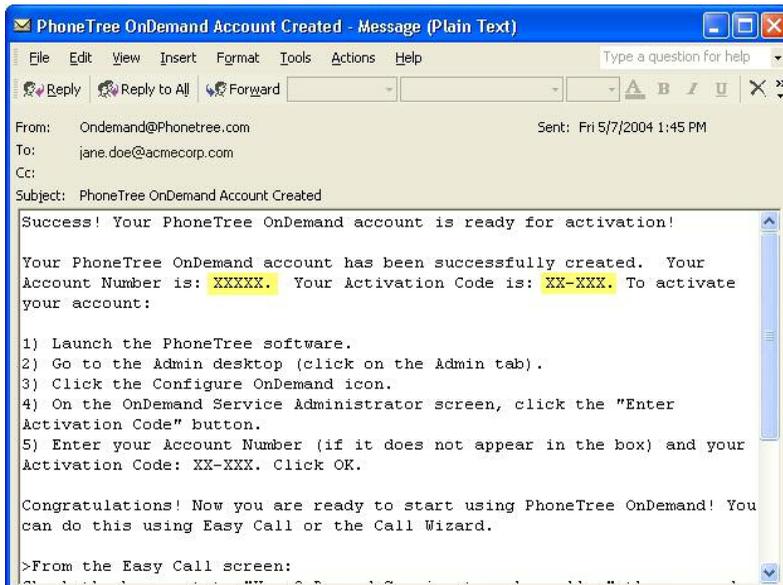
You will receive an e-mail message similar to this one, containing your **Account Number** and **Activation Code**. **KEEP this e-mail**, in case you ever need to re-install your software or if you decide to use the account on another computer. Also make note of your account and user PIN codes.
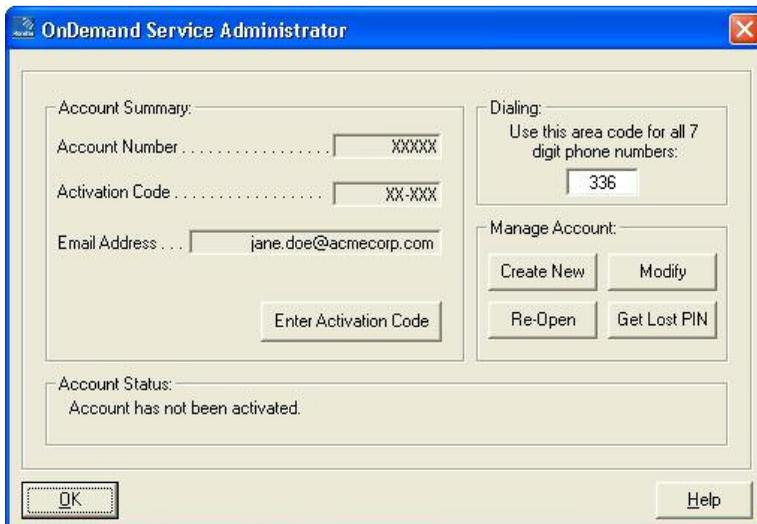
7 Enter your local area code in the **My local area code** box. Click the **Enter Activation Code** button on the main screen of the OnDemand Service Administrator (the same screen from step one).

7a Enter your **Activation Code** in the box under the **Account Number**. Click **OK** when done. Now, the main screen of the OnDemand Service Administrator says "Account is active." Congratulations! Your account has been activated.

Submitting a Call Job:
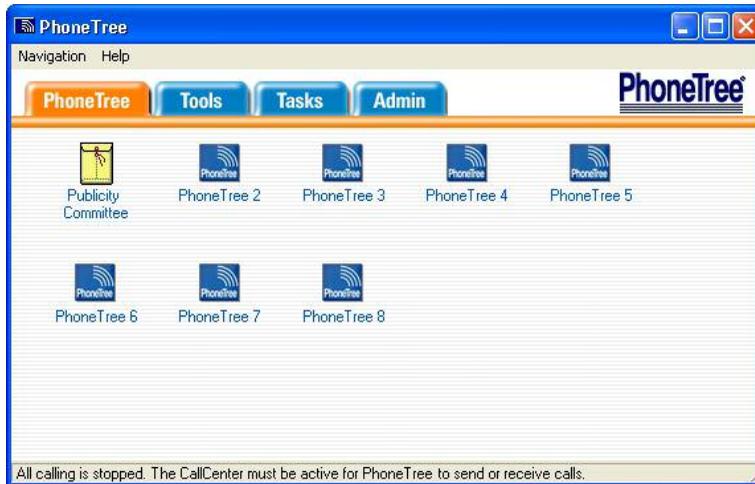
Using EasyCall

a) Click on the icon on the PhoneTree desktop to go to the List Editor for the PhoneTree you wish to use.
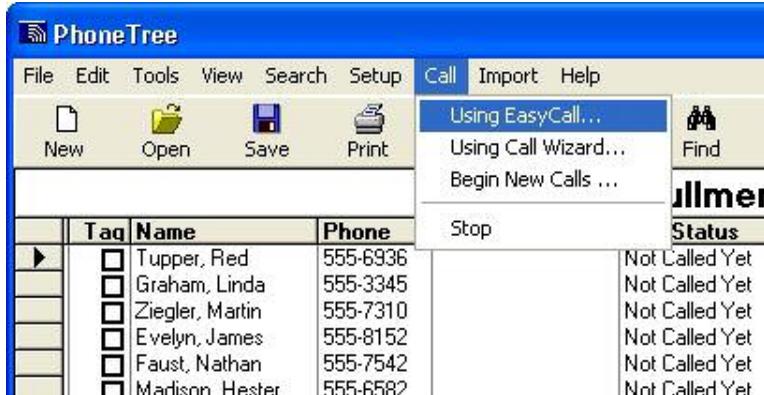
b) Choose **Using EasyCall**... from the **Call Menu**.
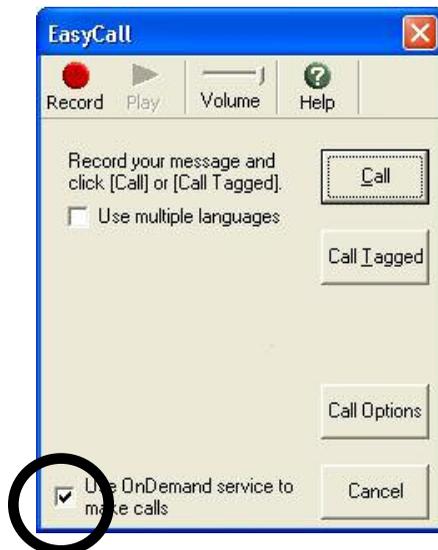
c) Record your message and use the controls on the **EasyCall** screen as described in the Your First Call Job section (see page 40) of this user guide. Be sure the check box next to **Use OnDemand service to make calls** is checked. Click the **Call** or **Call Tagged** button to continue.

Note: OnDemand messages have a maximum time limit of **1 minute** when using **Easy Call** *(time subject to change)*. Please make sure your message's total length, including any and all message content such as the **More Info** option, *does not exceed* this time limit.

d) This next screen summarizes the call job you are about to submit. If the information shown is correct, click **Yes**.

Note: You can choose not to show this window in the future by checking the box next to **Don't show this dialog again**.

e) Enter the correct **User PIN** created for a user in step four on page 117 (Step 4a), and the e-mail address associated with this user. When done, click **Next**.

f) This screen summarizes the information for your account, including your call rate and allowable calls for the month. When done, click **Next**.
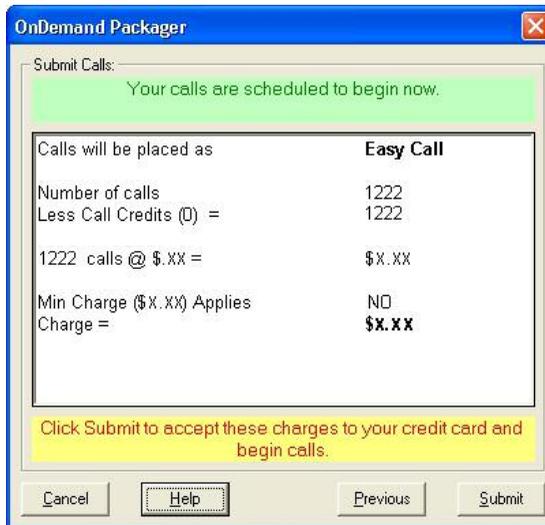
g) Now you will see a summary of the charges to be billed for this call job. If the information is correct, click **Submit**.
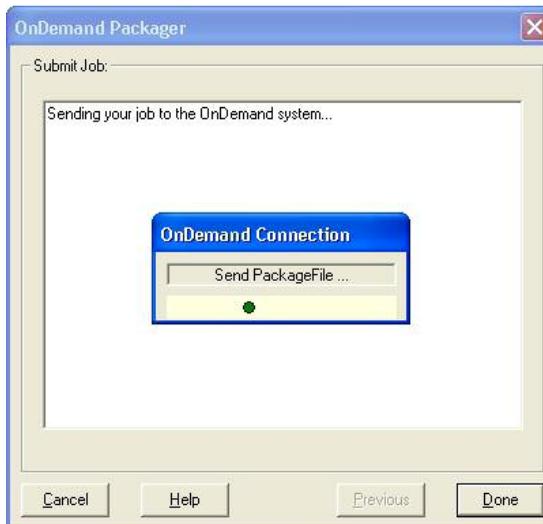
Next, the PhoneTree software will "package" the information for your call job and submit it to the Call Center. You will receive a confirmation e-mail with a tracking number for your call job.

Using the Call Wizard

To use the OnDemand service with the Call Wizard, follow the steps you normally would to set up a call job with the Call Wizard [read the Call Wizard section for the PhoneTree model you own: 2500 (pages 58-62) or 3500 (pages 72-81)]. On the last screen, make sure the box next to **Check if you wish to use the OnDemand service to place your calls** is checked. After you click the **OK** button, the remaining steps are the same as Steps **d**-**g** in the previous section, **Using Easy Call** (pages 121-124).

Note: OnDemand messages have a maximum time limit of **2 minutes** when using the **Call Wizard** *(time subject to change)*. Please make sure your message's total length, including any and all message content such as the **More Info** option, *does not exceed* this time limit.

Getting Call Results:
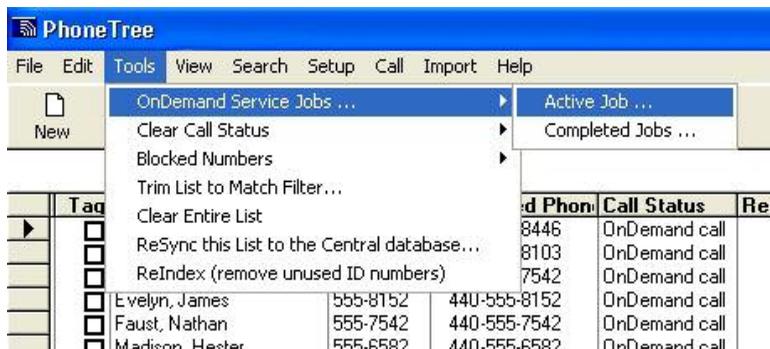
Active Jobs
To check the status of your submitted OnDemand call job or to stop it from calling, choose **OnDemand Service Jobs ▸ Active Job**... from the Tools menu.
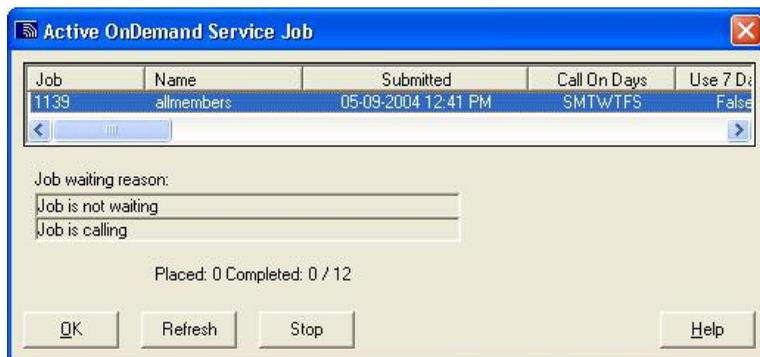
Here you can see your job number and file name, time and date of submission, selected call options for the job, and number of placed and completed calls. Click the **Refresh** button to get updated information, click **Stop** to stop a call job in progress, or click **OK** when finished.

Note: If you choose this option and receive a message that says "**There are no active jobs for this PhoneTree**," then your call job has been completed.

Merging Results

Once your call job has been completed, choose **Merge OnDemand Service Call Results** from the **Import** menu.

You should receive a message that says **OnDemand results have been merged to**: ‹*name of your file here*›. Now, you can view, sort and print your results just as if you had placed the calls with the PhoneTree hardware. Read more about the different PhoneTree Call Statuses in the Call Center section (see page 85).

Note: If you choose this option and receive a message that says "**Call Results for** ‹*name of your file here*› **are not available at this time**," then your call job has not been completed yet. Read the previous step for instructions.
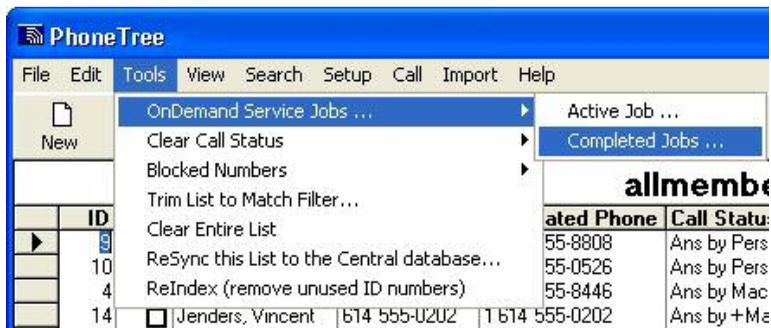
Completed Jobs

To check the status of your submitted OnDemand call job, choose **OnDemand Service Jobs** ▸
Completed Jobs... from the **Tools** menu of the PhoneTree List Editor.

Here you can see the job number and file name, time and date of submission, and the selected call
options for the completed OnDemand jobs for this PhoneTree. Now click the **View** button.
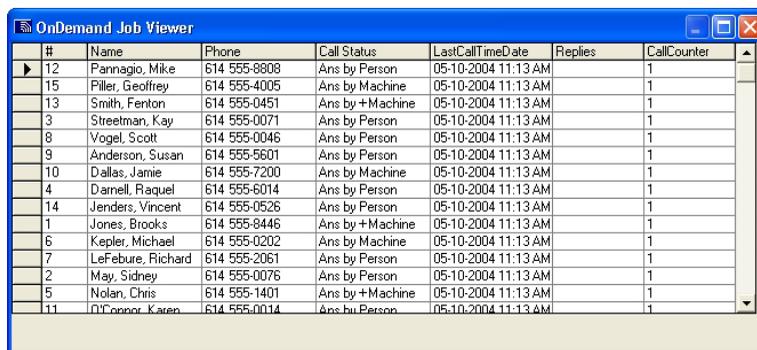
Here you can view the specific status information for this completed job. When you are finished
viewing, click the cancel **X** in the upper right corner.
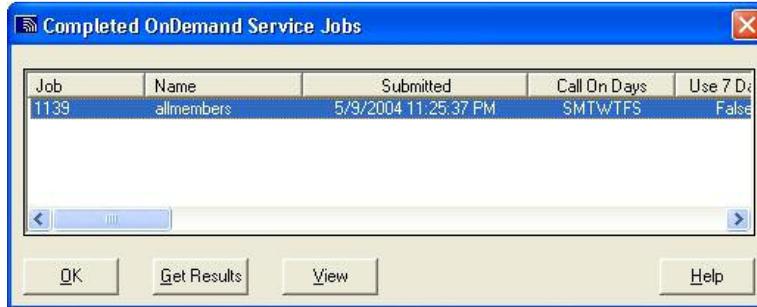
If desired, click the **Get Results** button to merge call status information back into this PhoneTree. However if you have more recent call status information in this PhoneTree (from a subsequent call job), *doing so could overwrite the more recent data*.

Click **OK** when done.

Notes

PhoneTree Client
(2500 & 3500 Only)

PhoneTree Client

The PhoneTree Client is a remote operation tool for your PhoneTree system which allows limited control from other computers in your network. While it doesn't allow full access to all features, it does let you start, pause, stop or cancel call jobs, record messages, import data, change call options (such as the time and day your calls should go out), and view call results after your calls have finished.

Note: PhoneTree Client does not provide the ability to view the **List Editor** (see page 38, step 3) or make any changes therein.

Before use of the PhoneTree Client can take place, you must follow the steps in the **Initial Setup** (Host & Remote) portion of this chapter. *Proper connectivity and operation of PhoneTree Client are reliant on these required steps.* It is recommended that you consult your Network Administrator to ensure the correct permissions are in place for your Windows login.

Initial Setup: Host PC Configurations:
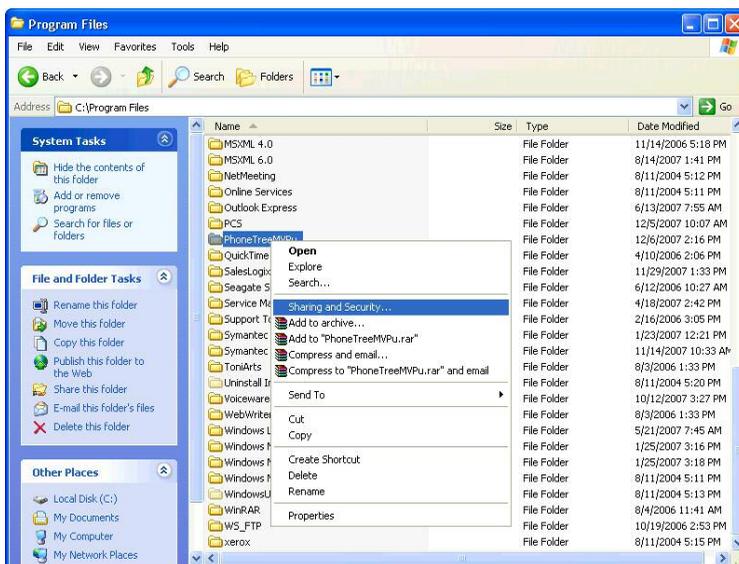
1 First, the PhoneTreeMVPu folder must be shared on the PC where PhoneTree is installed (Host PC). Browse to **C:\Program Files** and right-click on the **PhoneTreeMVPu** folder, then click **Sharing and Security**....
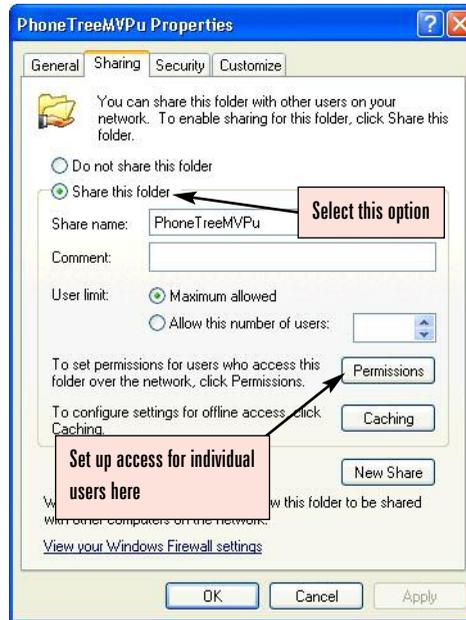
2 On the **Sharing** tab, click **Share this folder**, then click **Permissions**.
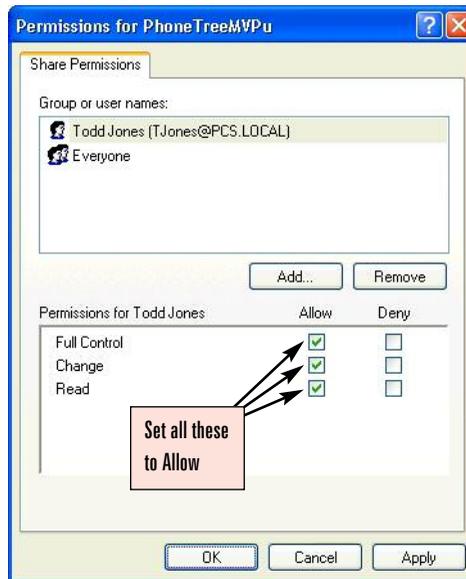
3 Select or add a Group or User and then set each permission to **Allow**. When finished, click **OK**.

The Host PC is now configured to work with PhoneTree Client. Next, go to the Remote PC (where you plan to operate PhoneTree Client from) and configure its mapped drive settings.

Initial Setup: Remote PC Configurations:

1 On the Remote PC, right-click **My Computer** and select **Map Network Drive**....

2 From the **Drive** drop-down box, choose an unused drive letter and click **Browse**....

3 This window displays all the available networked folders seen from this PC. Browse to the 'PhoneTreeMVPu' located on your Host PC that you set up in the previous section. Once you find it, select it and then click **OK**.

4 The **Folder** drop-down box now displays the path of what you selected from the previous step. To save the mapped drive you just configured, click **Finish**.

The Host and Remote PCs are now configured to work with PhoneTree Client. Please proceed to configure PhoneTree Client to work with the PhoneTree system.

Initial Setup: Client Configurations (Remote PC):

1 After installing the PhoneTree Client on the Remote PC (see page 9), launch it by clicking on the PhoneTree Client icon on your PC's desktop. The first time PhoneTree Client runs, you will see these two warning messages appear, one after the other. Click **OK** for each of them to proceed. The following configurations will address these warnings.

Click here to locate the PhoneTreeMVPu.exe file
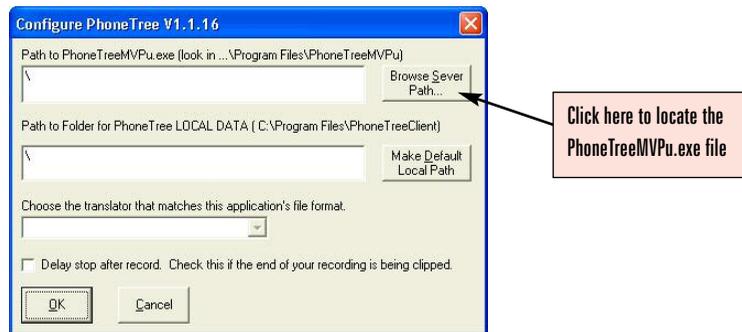
2 The **Configure** window will now appear. Click the **Browse Server Path**... button.
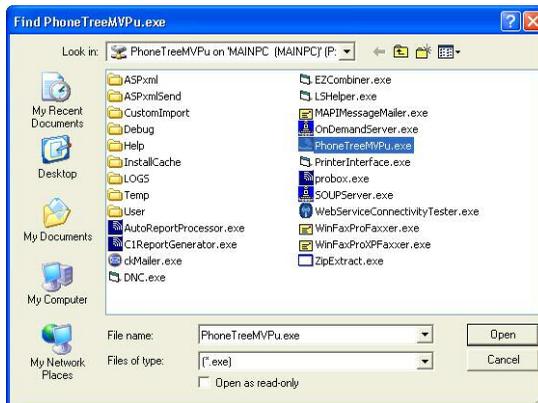
3 Browse to the **PhoneTreeMVPu.exe** file located on the mapped drive you set up in the **Initial Setup (Remote PC)** step, select it and then click **Open**.

Configure PhoneTree V1.1.16

Path to PhoneTreeMVPu.exe (look in ...\Program Files\PhoneTreeMVPu)

P:\   [Browse Server Path...]

Path to Folder for PhoneTree LOCAL DATA (C:\Program Files\PhoneTreeClient)

C:\Program Files\PhoneTreeClient\   [Make Default Local Path]

Choose the translator that matches this application's file format.

CSV

☐ Delay stop after record. Check this if the end of your recording is being clipped.

[OK]   [Cancel]

Select your translator

Click here to set default path
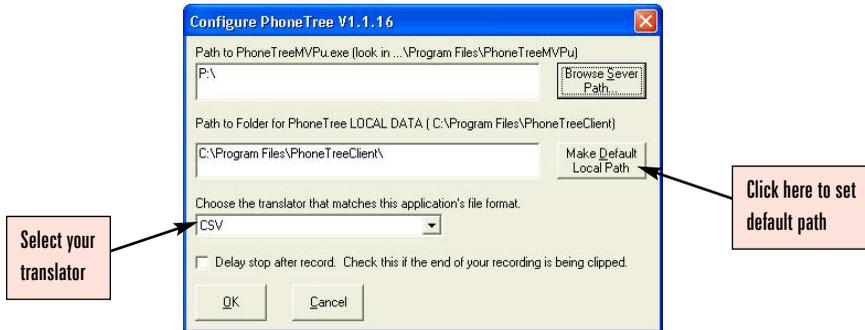
4 The Configure window reappears. You will now see in the **Path to PhoneTreeMVPu.exe** field that only the mapped drive letter appears. This confirms that you have the correct path set.

Next, to create a default folder where all your calling preferences and other data will be kept, click the **Make Default Local Path** button. A folder will be created on your hard drive in the location shown, and this is where all data generated by the PhoneTree Client software will be stored.

Next, select your translator type from the **Choose the translator** drop-down box. This translator will be used if you generate a calling list locally, on your Remote PC, and you want to send it to PhoneTree to use when starting a call session. **CSV** will translate any comma-delimited text (ASCII) file that follows the format to the right (last name, first name, phone). Use this unless you commonly use a member database program and its translator appears in the drop-down box.

Click **OK**. You are now ready to start calling.

clientlist.txt - WordPad

File Edit View Insert Format Help

Roberts, Mike, 5559656
Sherman, Stuart, 5554512
Sherman, Tracy, 13365550633
Smith, John, 5551772
Brown, Elwood, 5555261
Fischer, Russell, 5559921
Pennington, Noel, 5555822
Smith, Paul, 13365555589
Underwood, Randy, 3365550096
Welch, Luther, 5551212
White, Charles, 13365552372
Zimmerman, Taylor, 13365551256
Brown, Ziggy, 5555261
Carter, Vincent, 13365555958
Coldway, Greg, 13365554213
Fisher, Burt, 5552345
Fortas, Ike, 13365551450
O'John, William, 13365553987
Pruitt, Steve, 5558695
Richard, Roy, 13365556235
Alabaster, Stanley, 3365552222
Bittless, Dora, 5559955
Bishops, Cory, 5552372
Elrod, Myrna, 13365551274
Flemmo, Jimmy, 5550521
Heckman, Ken, 5551243
Kilebrew, Harmon, 5559506
Kiles, Audrey, 5556185
Kilgore, Dave, 13365557100
Phillips, Caroline, 5555201
Roberts, Bob, 5552365

For Help, press F1

This is a sample ASCII file, viewed in WordPad.

Initial Setup: Call Options (Remote PC):

Once you are finished with configuration, you will see the **Call Status** window, which is the main window for the PhoneTree Network Client. To initiate a call session:

1 Click on the **PhoneTree** button.

2 Choose the PhoneTree you would like to access from the menu, then click the **OK** button. PhoneTrees protected by a password will be marked with an asterisk (*). **Note:** Be sure the PhoneTree you select already has a **Call List** file created for it (see page 38, step 2).
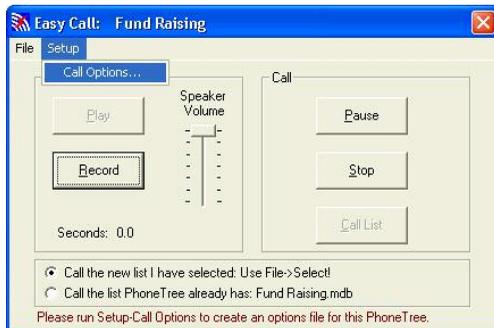
3 The **Easy Call** dialog will appear. From the **Setup** menu, choose **Call Options**.

4 The **Call Times** tab will be active. Choose days to call by clicking the box(es) next to each day. Change the **Don't Call Before** and the **Don't Call After** times by clicking on them. A **Set Time** box will appear, allowing you to make changes. There is a checkbox called **Allow Different Times for Each Day**. If you choose this option you can change the **Don't Call Before** and the **Don't Call After** times to something different each day. Also, you can choose to use **Pause/Resume** (to pause calling when people are eating dinner, for instance). Turning this option ON brings up the pause/resume times.
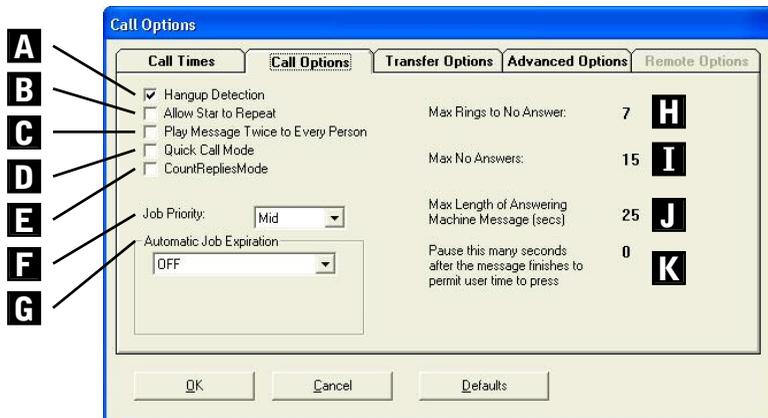
5 Click on the **Call Options** tab.

A. Selecting the **Hangup Detection** option means that if the called party hangs up early, PhoneTree will note this is in the status report (Recommended setting: **ON**).

B. Allow Star To Repeat gives the listener the option to repeat the message by pressing the Star (*) key on their phone. If you choose this option, you will need to add "To hear this message again, press the star key now" toward the end of your message, followed by a pause to give the listener time to press (*) (Recommended setting: **ON**).

C. Play Message Twice to Every Person means that each time PhoneTree delivers a message, it will play the same message twice. This option significantly lengthens the time ti takes to finish a call job (Recommended setting: **OFF**).

D. Quick Call Mode speeds message delivery by calling only people who answer right away. During the first round of calling, PhoneTree will only ring 3 times at a number before hanging up and going to the next number. The result is that answering machines or voice mail, which typically pick up after the 4th ring, will be called last. During subsequent rounds of calling, PhoneTree will revert to its normal calling setups (Recommended setting: **OFF**).

E. Count Replies Mode tells PhoneTree to stop calling after the desired number of people press 9 in response to your question. For example: "Hi this is Steve. I'm calling to get three volunteers to help paint the gym. If you can help, please press 9 now. --pause-- Thanks!" If this option is selected, a **Replies Needed** number appears (default: 5) where you can change the number of "yes" (9) replies from 1 to 1000. This mode only recognizes 9 when dialed on touch-tone phones. This feature is especially good for seeking a limited number of volunteers, because PhoneTree will stop calling after the number of desired 9 replies are received (Recommended setting: **OFF**).

F. Job Priority enables you to specify whether your job is Low, Medium (Mid), or High priority. Use Medium (Mid) for most call jobs, High for when a job is urgent and needs to be completed quickly, and Low for call jobs that aren't as time-sensitive as most. If you select High, your call job will precede all other current jobs and will be completed first (Recommended setting: **Mid**).

G. Automatic Job Expiration lets you specify how long a call job should be active before it expires. This is useful for large call jobs that can't be completed in one day. Use **Specify Days** to select a set number of days between 1 and 255 or **Specify Date** to select a specific date from the time you launch the call job (Recommended setting: **OFF**).

H. Max Rings to No Answer refers to the number of rings before PhoneTree considers the call to be not answered. Select a value between 3 and 8, keeping in mind that most answering machines will pick up after the 4th ring (Recommended setting: **7**).

I. Max No Answers can be set from 1 to 15. PhoneTree will call a number back this many times if it gets a busy signal or no answer. PhoneTree automatically spreads reattempts to these numbers throughout the day (Recommended setting: **15**).

J. Max Length of Answering Machine Message (secs) can be set between 25 and 80 seconds. Change this only if you see "OGM Too Long" in the status report (Recommended setting: **25**).

K. Pause this many seconds after the message finishes to permit user time to press is helpful if you are using the "Star to Repeat" option. Use it to assure that the recipient has enough time to press the Star key (Recommended setting: **0**, when using Star to Repeat: **2**).
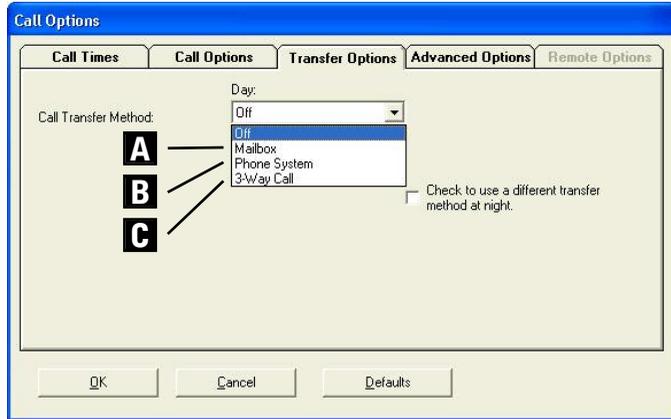
6 Click on the **Transfer Options** tab. There are four options in the drop-down menu: Off, Mailbox, Phone System and 3-Way Call. Unless set to Off, any time recipients press 0 during a PhoneTree message they will be transferred to the location you specify here.

A. Mailbox: This option allows your members to leave you a voice mail message, just as if you had an answering machine hooked up to PhoneTree. You will need to record an OGM (outgoing message) on the Host PC that will be played after a member presses 0. To do this, click OK on this screen and read the help files for Mailbox Messages on the Host PC. Don't forget to tell your members *in your PhoneTree message* to press 0 if they want to leave a message.

B. Phone System: This allows your members to be transferred to a live operator in your office. You will be prompted to specify the extension to where the call will be transferred, and also to specify a hook flash delay (leave at 3 unless you experience problems). This option requires that PhoneTree be connected to an analog extension on your phone system.

C. 3-Way Calling: Choose this option if you subscribe to 3-Way Calling through the phone company and you'd like your recipients to be able to be transferred to another number. You will need to specify the number to where the recipient will be transferred, and also to specify a hook flash delay (leave at 3 unless you experience problems).
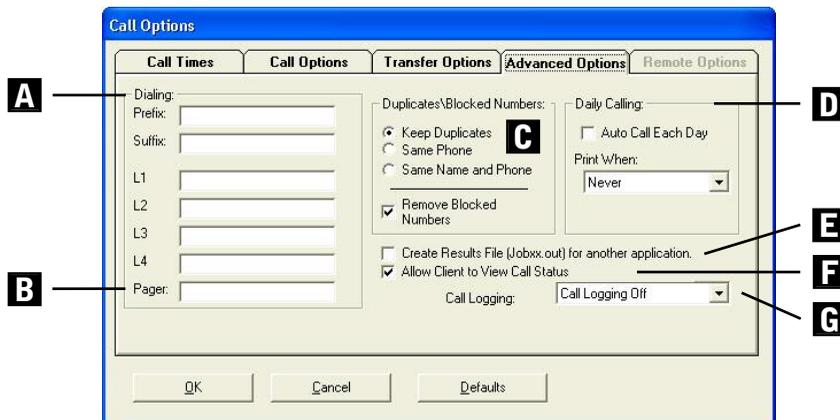
7 Click the **Advanced Options** tab. In general, we recommend you not change these options unless directed to do so by a PhoneTree technician. However, you may need to adjust these settings in special cases.

A. These dialing settings are included here if you need to make adjustments on a *per-PhoneTree basis*. For example, suppose you want **this PhoneTree only** to talk to people who are at home (i.e., to never leave a message on an answering machine). You would put an "A" in the Suffix box (which tells PhoneTree to hang up when it detects an answering machine). Remember, any Prefixes, Suffixes, and Library numbers you type here will be **in addition to** any others typed on the Configure Phone Lines dialog on the Admin Desktop of the Host PC (which are system-wide).

B. If this PhoneTree will be calling any pager numbers, type in the callback number here in the **Pager** box, and be sure to put a "C" in your list after any pager phone number (i.e. 722-5992C). Doing this will ensure that PhoneTree will leave your callback number on the pagers it calls.

C. Duplicates/Blocked Numbers: PhoneTree will remove duplicates automatically, if you check one of the two options here. Selecting **Keep Duplicates** (default) will keep your list unchanged. Keep **Removed Blocked Numbers** ON (default) unless you would not like PhoneTree to remove the people on the Blocked Number list (see page 172).

D. Daily Calling: If you would like this PhoneTree to call the same list each day (during the call window(s) you set on the Call Times tab), check this option. You can also print your call status report automatically (choose from Never, No Answer/Not Confirmed or After Max Tries). **Default**: OFF

E. Create Results File (Jobxx.out) **for another application**: If you would like to save a call status file that another application (e.g. your member management program) can use later, check this option. **Default**: OFF

F. Allow Client to View Call Status permits the client to view the call job results after a call job is complete. **Note**: This same setting must also be enabled on the Host PC in order to work (see page 145).

G. Call Logging: To have calls made with this PhoneTree included in the system-wide call log, choose either **Log Completed Calls** or **Log All Calls** from the drop-down box. **Default**: OFF

Click the **OK** button.

8 You will be returned to the **Easy Call** screen. To record your message, press the **Record** button. After you hear the beep, immediately start speaking your message into your microphone headset. You will see a counter displaying the time elapsed. Once you have completed your message, press the **Stop** button. To preview your message, click the **Play** button. If you don't like your message, press the **Record** button again and record over the old message (if the voice quality is too soft, check the mixer settings for your sound card).

When you are happy with your message, click one of the radio buttons at the bottom of the screen:

a. **Call the new list I have selected**: **Use File ▶ Select!**: Use this if you have generated a new list locally (on your computer) using third-party software. Turn to the Importing Data section (page 148) for instructions on how to do this.

b. **Call the PhoneTree already has**: *‹name of file›*.**mdb**: Use this if you want PhoneTree to call using the file that is currently active on the server machine for this PhoneTree. The correct name of this file will appear here (if you see **No list available!** then you will need to go to the PhoneTree host computer and select a list for this PhoneTree).

Daily Operation: Starting a Call Job (Remote PC):

Click here to start calls.
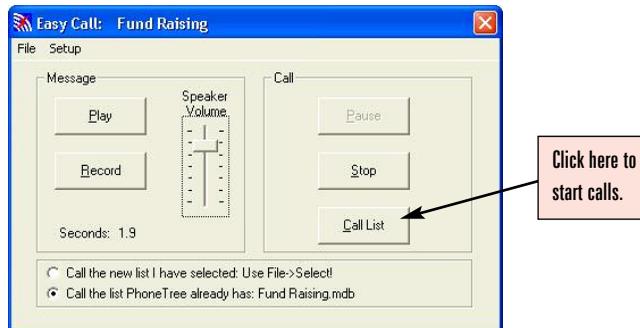
1 To start calling, click the **Call List** button on the **Easy Call** screen:

Calls will be paused as your new job is added.
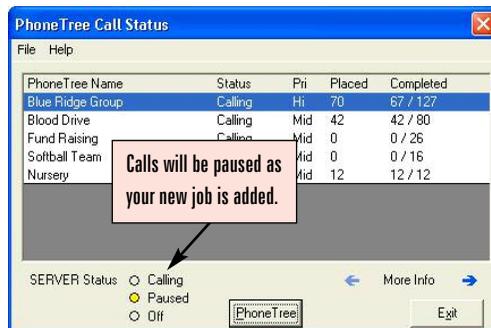
2 The light on the Server Status will turn from green (Calling) to orange (Pausing!), to yellow (Paused) and finally back to green again, when you will see your new call job appear in the list of PhoneTrees.

You can monitor calls for the currently active PhoneTrees right here from your own computer. The information shown is updated every few seconds.

Daily Operation: Checking Call Status (Remote PC):

Once your call job is complete, you can check the Call Status, for a complete report on the call job. Here's how:
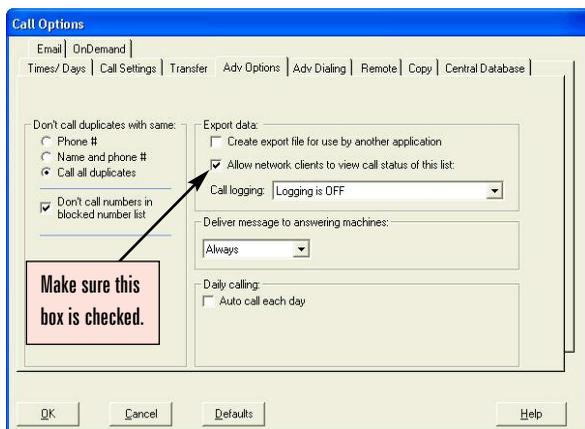
1 First, you must contact your PhoneTree Administrator or visit the Host PC. Open the PhoneTree icon you are planning to use and choose **Call Options** from the **Setup** menu or tool bar. Click on the **Advanced Options** tab and make sure the **Allow Client to View Call Status** box is checked. This must be done on the Host PC and on the Remote PC in the client (see page 142). You will only need to do this once for each PhoneTree.
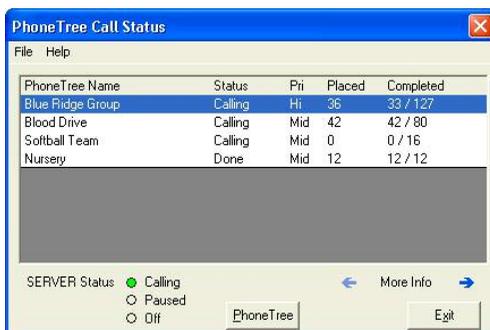
2 Now, go back to the PhoneTree Client on your Remote PC and click the **PhoneTree** button on the Call Status screen.

3 Choose the PhoneTree for which you would like to view the Call Status and click **OK**.
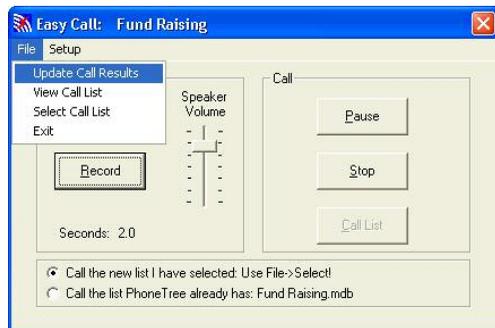
4 Now you are back on the **Easy Call** screen for that PhoneTree. Choose **Update Call Results** from the **File** menu.
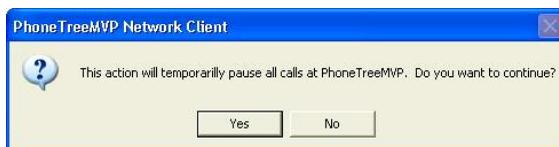
5 Click the **Yes** button on the dialog box that appears.

6 Now you should get a notification that looks like the one above. Click the **OK** button.

7 You will be taken back to the PhoneTree Call Status screen (the main Client screen) and you can watch as calls are temporarily paused while an up-to-date call list is generated on the Host PC.

8 Once calls have resumed and the green light is back on, click on the **PhoneTree** button again, and choose your PhoneTree from the **Choose a PhoneTree** screen again (repeat steps 2 and 3).
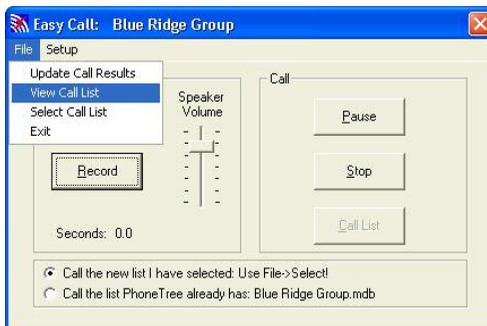
9 Choose **View Call List** from the **File** menu of the **Easy Call** screen.
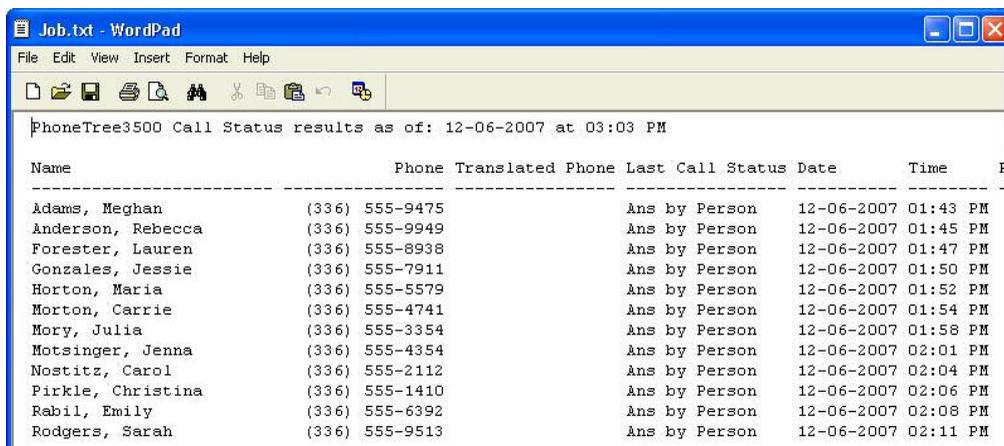
10 The **Call List** (including the most recent Call Statuses) for this PhoneTree will be opened automatically as a text file (**Job.txt**) in WordPad. This is a new text file generated by PhoneTree and now resides in your PhoneTree Client folder locally, on your PC. It should look like the picture above.

Reference: Importing Data (Remote PC):

Before you can import data using the Client software, *the translator for your file type must be configured for PhoneTree on the Host PC*. If this is not done beforehand, the file import may fail.

PhoneTree can use data generated by any data management software. If your database application can produce an **ASCII** (.dat or .txt), or a **Comma Delimited** (.txt), **CSV** file, then you will be able to import the data into a list that your PhoneTree can use. Different applications (such as Microsoft Word, Excel, etc.) will have different ways of saving data into one of these formats. Look for an **Export** or **Save As** command in the file menu. Read the documentation that came with your database application instructions. For simplicity, save the exported data in the PhoneTree Client folder. In addition, your application may have a Custom Translator (that will appear on the Configure PhoneTree screen – see page 137) Following is an example using the most common translator, **CSV**, assuming that you have placed the exported file in the PhoneTree Client folder.
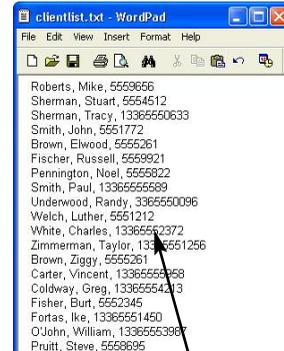
This is the exact format that your data will need to be in to work with the CSV translator.

1 First, confirm that **CSV** is chosen on the **Configure PhoneTree** screen (see page 137). This translator is actually stored on the Host PC, *not* locally on your computer. Now, click the **PhoneTree** button on the main screen (PhoneTree Call Status).

2 Choose the PhoneTree for which you would like to import a file and click **OK**.

3 Choose the "**Call the new list I have selected**" radio button, *then* choose **Select Call List** from the **File** menu.
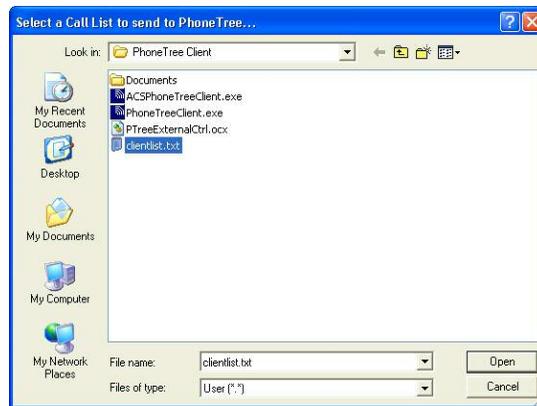
4 Choose the list you would like to use from the following dialog, then click the **Open** button.

Note: This assumes you were able to export your file from the application that created it as a comma-delimited text file (.txt, .dat or .csv) and that you placed the exported file in the **PhoneTree Client** folder.

5 You will now be given the opportunity to preview the file before sending it to PhoneTree for translation. Click **OK** if you are satisfied that this is the correct file.

Now the name of your imported file shows up here.
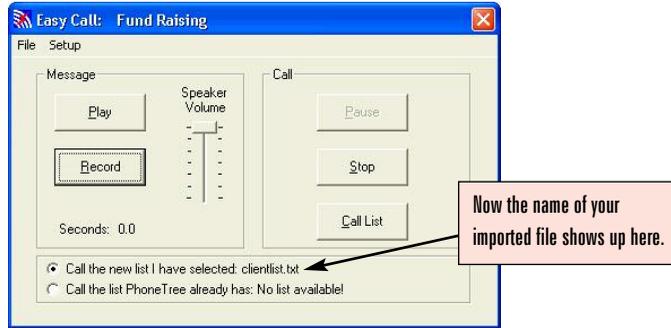
6 You will be taken back to the **Easy Call** screen. Record a message if you haven't already (follow Step 8 on page 143) and click the **Call List** button. Notice that the name of your list now shows up on the screen.

Calls will be paused as your new job is added.

7 The light on the Server Status will turn from green (Calling) to orange (Pausing!), to yellow (Paused) and finally back to green again, when you will see your new call job appear in the list of PhoneTrees.

Reference: The Call Status Screen (Remote PC):

A. The File Menu: Allows you to Configure your Client settings (page 136) or to Exit the program.

B. The PhoneTree List: Displays a list of all the PhoneTrees currently calling. Check the entries in the **Status**, **Pri**(ority), **Placed** and **Completed** columns for information about what is happening with each PhoneTree.

C. More Info: Click these arrows to see more information about each PhoneTree, including **Start Date**, **Start Time**, **Call From**, **Till**, **Call Days**, **Pause At**, **Resume At**, **Night**, **Call File**, **MaxRings**, **MaxNo9s**, and **Xfer To**.

D. Server Status: There are three options: **Calling** (green light), **Paused** (yellow light), and **Off** (red light). **Calling** means the PhoneTree software is running and is currently in its call mode (the Call Center on the Host PC). **Pausing!** or **Paused** means that the PhoneTree software is running, but not in call mode (one of the other Desktops may be displayed). **Off** means that the PhoneTree software is not running on the Host PC.

Call Status Screen Headers

Status: Will show Calling (calls are currently in progress), Done (call job is complete) or Idle (no current call job scheduled).

Priority: Either Low, Mid (the default) or Hi. See pages 138-139 for instructions on how to change the priority for a call job.

Placed: Will display the number of calls placed. This number is often larger than the number of completed calls because PhoneTree will call back if no one answers the phone or if the line is busy.

Completed: Shows two numbers: the first is the number of people in your list who have been completed. The second number is the total number of people in your list.

Start Date: The day on which the current call job was initiated.

Start Time: The time (on the Start Date) when the current call job was initiated.

Call From: Displays the **Don't Call Before** time you specified on the **Call Times** tab of the **Call Options** dialog (page 139).

Till: Displays the **Don't Call After** time you specified on the **Call Times** tab of the **Call Options** dialog (page 139).

Call Days: Displays the **Call On Days** you specified on the **Call Times** tab of the **Call Options** dialog (page 139).

Pause At: Displays the **Pause Call At** time you specified on the **Call Times** tab of the Call **Options** dialog (page 139).

Resume At: Displays the **Resume Call At** time you specified on the **Call Times** tab of the **Call Options** dialog (page 139).

Night: Displays the **Start Night Messages At** time you specified on the **Call Times** tab of the **Call Options** dialog (page 139).

Call File: Shows the file that each PhoneTree is currently using for calling. **Note:** Any file sent from the the Client will show up here as "ClientImport" (regardless of the name you gave it locally).

Max Rings: Displays the **Max Rings to No Answer** number you entered on the **Call Options** tab of the **Call Options** dialog (page 139).

MaxNo9s: Displays the number of attempts PhoneTree will make if you have turned **Intro w/9** ON using the **Call Wizard** (must be done of the Host PC). Default is 3.

Xfer To: Shows the Transfer extension number (not the Method) you specified on the **Transfer Options** tab of the **Call Options** dialog (page 141). **Note:** Will only display a number if you chose Phone System as the Method.

Troubleshooting

PhoneTree

Line Card 1 was not found, but is required for this operation.

The PhoneTree hardware is not responding. Please quit the program and check the USB cable connection. Unplug and reconnect power to the USB unit. Wait 30 seconds and restart the program.

OK

Line Card Not Found

Q. I keep getting an error message that says "Line Card Not Found."

A. This error always means that the PhoneTree software is having trouble recognizing the PhoneTree hardware. This common problem of the PC not recognizing a USB peripheral can occur with any USB device, not just PhoneTree. To resolve this, try the following steps in order:

Cause: Power Management is enabled under Windows XP AND/OR the PC is set to hibernate.

Remedy: To manage power, Windows XP will attempt to disable USB when a device is not used. As the default behavior, this often does not work properly and may cause Windows to not properly recognize a USB device (including PhoneTree). Fix this problem by following the instructions on pages 18-20, then:

1. Disconnect the power cable from PhoneTree, wait 20 seconds, then reconnect the power cable.

2. WAIT for Windows to recognize your new hardware and load the drivers. This step may take several minutes.

Cause: The PhoneTree unit is not receiving power.

Remedy: Confirm that the PhoneTree wall transformer is plugged into the power adapter jack on the back of the unit, and that the other end is plugged into an operational wall outlet. The green power indicator light on the front of the unit will be on.

Cause: Electrical glitch, upgrade of PhoneTree or Windows software, installing any new Windows program, or any other Windows anomaly.

Remedy: Reboot the PhoneTree USB unit (Disconnect the black power cable for 15 seconds) then reboot your PC (start ▶ shutdown ▶ restart). Reconnect the black power cable directly after you choose restart.

Cause: Starting PhoneTree software before Windows finishes booting.

Remedy: Whenever restarting your PC, be sure all boot activity has completed prior to starting the PhoneTree software. Be sure your mouse pointer is NOT showing the "hourglass" for at least 10 seconds prior to starting the PhoneTree program.

Cause: PhoneTree's USB cable is not properly connected or is faulty.

Remedy:

1. Confirm that the PhoneTree USB cable is firmly plugged into both the USB port on the back of the PhoneTree unit (**please note**: this cable should not be forced to sit flush with the USB port on the unit), and the other end is plugged into an available USB port on the back (or front) of your PC.

2. Unplug the PhoneTree USB cable from the back (or front) of your computer and try plugging it into a different USB port.

3. Replace the PhoneTree USB cable with a different USB cable.

4. Connect a different USB device to the same USB port on your PC and check to see if the device is recognized in the Windows Device Manager (see page 18).

Cause: Improperly installed PhoneTree USB driver software.

Remedy: Uninstall PhoneTree software using the Control Panel "Add/Remove Software" dialogue. Then reinstall PhoneTree software from the original disk. **Note:** Any calling lists and settings will be retained and will not be affected by this procedure.

Cause: Improperly installed or corrupted PhoneTree USB driver software

Remedy: Disconnect your PhoneTree's USB cable from the PC and the PhoneTree power transformer. Then remove your USB root hub by right-clicking on the "My Computer" icon, selecting the Device Manager under Hardware, then right-clicking on "USB Root Hub" under "Universal Serial Bus controllers" and choosing "Uninstall" from the pop-up menu. Restart your PC, then reconnect the PhoneTree power transformer and the USB cable to the PC.

If you have tried all these suggestions and you are still receiving the error, please contact PhoneTree Customer Support at **866.234.2943**.

Q. *I connected the USB cable before installing the PhoneTree software. I've got the software installed now. How should I fix this?*

A. Follow these steps in order:

1. Open the Device Manager (see page 18) and remove the unrecognized devices (designated by exclamation points) by right-clicking on them, then choose Uninstall from the drop-down menu. Repeat for each unrecognized device.

2. Unplug the PhoneTree power transformer.

3. Reconnect the PhoneTree power transformer.

4. Wait as Windows recognizes your new hardware and loads the drivers. This step may take several minutes.
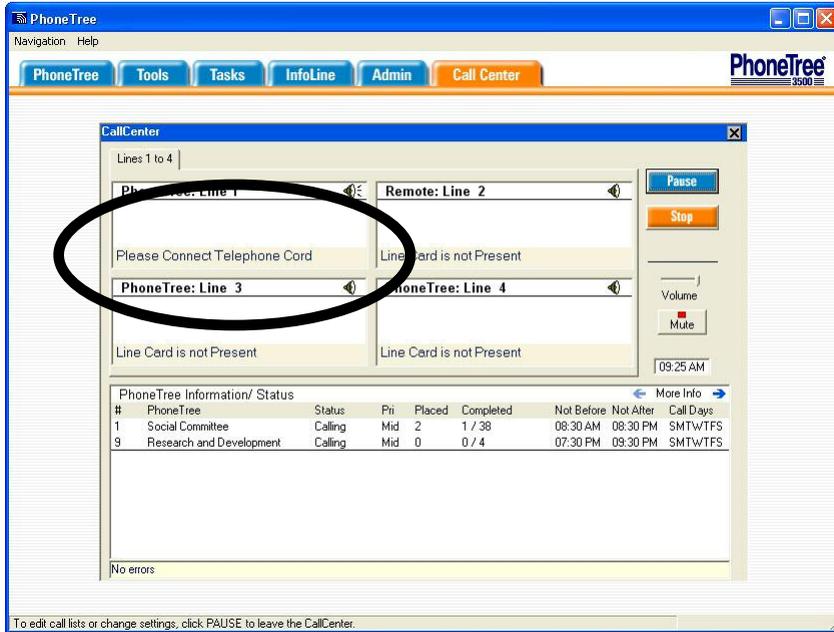
Please Connect Telephone Cord

Q. I keep getting a message that says Please Connect Telephone Cord. How can I fix this?

A. This error message means that the PhoneTree software is not recognizing an operational and correctly connected analog phone line, and therefore cannot make calls. There are several reasons why you might experience this. After exiting from the PhoneTree software, try the following steps in order:

1. **Connect a Standard (Analog) Telephone**

    Disconnect the PhoneTree phone line from the wall outlet. Connect a known working analog telephone to this wall outlet, using the phone cable provided with PhoneTree.

    If the connector does not fit, contact your telephone provider to obtain the correct wall connector for your line.

    Note: PhoneTree requires a standard analog telephone line or an analog extension on a digital phone system.

2. **Verify Dial Tone**

    Lift the receiver and listen. If you hear a dial tone, proceed with the next step. If no dial tone is heard:

    Try a different phone cable instead of the one provided with PhoneTree. If you hear a dial tone with the new cable, proceed with the next step (and continue to use the working phone cable). If no dial tone is heard with the new cable, contact your telephone provider and ask for the problem to be corrected.
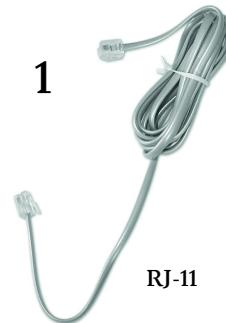
3. **Repeat For All Purchased Phone Lines**

   If you have a multi-line system, repeat steps 1 and 2 for all installed phone lines. Note that for each line installed, you will need to have an analog phone line installed by the phone company for PhoneTree to use in making calls.

4. **Disconnect, then Reconnect the PhoneTree Power Cord**

   Disconnect the black power cable from the back of the PhoneTree unit. Wait a few seconds, then reconnect the cable, confirming that the green light on the front of the PhoneTree unit is on.

5. **Reconnect the Phone Line Cable(s) to PhoneTree**

   Disconnect the analog telephone from the wall outlet and reconnect the phone cable(s) to the phone port(s) on the back of the PhoneTree unit. Confirm that all other cables (USB, etc.) for PhoneTree are connected.

6. **Test Line**

   From the Admin desktop, click on the **Configure Phone Lines** icon.

   In the Select Line box, confirm that the lines purchased and connected are displayed without hyphens appearing before or after the line number, and that each line shows up as "Detected" with the green dot when selected (as shown on Line 1 in the picture at right). If one or more lines are not **Detected** as shown on this screen, follow the instructions in the **Line Card Not Found** troubleshooting section on page 154.
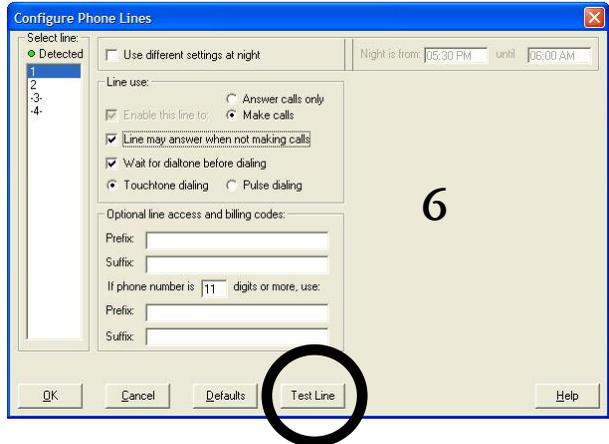
   Select the line in question in the **Select Line** box, then click the **Test Line** button.

   On the **Test Line Number** dialog, use these controls to determine if PhoneTree can detect a dial tone (click the **Get dialtone** button) and make a test call (enter a number for PhoneTree to dial, then click the **Dial number** button). If a successful test call was made, click **OK** and repeat the process with any other active lines.
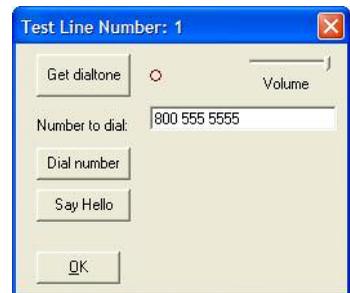
7. **Call Customer Support**

   If you have tried all these steps and none have worked, it's possible there is an issue with the line card inside your PhoneTree unit or other hardware. Please call Customer Support at **866.234.2943**.

Call Remote Won't Answer

Q. Why won't PhoneTree answer when I try to call in to configure a calling job?

A. The Remote Access feature allows you to access your PhoneTree using any touch-tone telephone to change call settings and to initiate a calling job. If not configured correctly, your PhoneTree may not answer when you attempt to access it by calling in. First, be sure you have set up the Remote Access feature correctly (page 107). Following are some common causes for this problem:

1. Check to make sure that the PhoneTree computer is on, and that your PhoneTree is correctly connected to the computer with the PhoneTree software running and in its calling mode (i.e. the Call Center.

   This needs to be the case anytime you try to call in, otherwise the PhoneTree software will not answer, even if Remote is correctly configured.

Be sure "Enable remote calling" and "Override Times/Days..." are both checked.
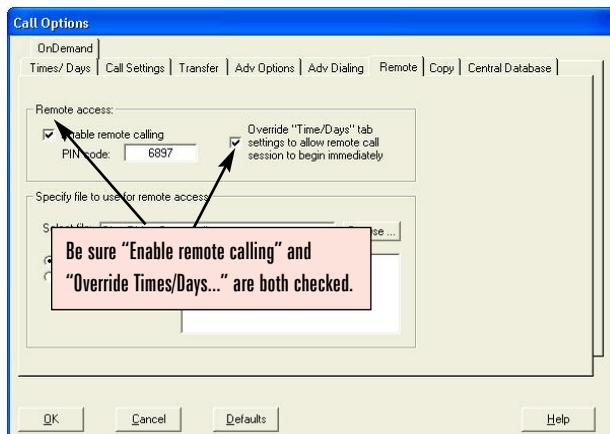
2. Be sure that Remote Access is enabled. click on the PhoneTree you wish to use from the PhoneTree desktop, then choose **Call Options** from the **Setup** menu. Click on the **Remote** tab. Make sure the box next to "**Enable remote calling**" is checked.

3. Make sure the box next to "**Override Time/Days tab settings to allow remote call session to begin immediately**" is checked. This will allow you to remotely initiate a call session anytime, as in the case of an emergency.
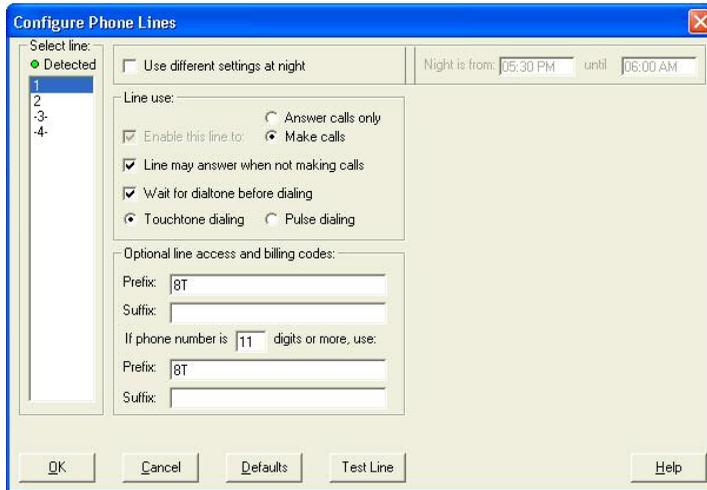
4. Check to see that the line assigned to PhoneTree is correctly configured for answering calls. From the main screen, click on the **Admin** tab. Click on the **Configure Phone Lines** icon.

a) In the **Select line** box, choose the line you wish to designate as a call-in line. Confirm that the line is recognized by the PhoneTree software (check for the green **Detected** icon at the top of the Select line box).

b) Be sure that the line is set to answer calls by clicking the radio button next to **Answer calls only** or if **Make calls** is selected, check the box next to **Line may answer when not making calls**.

5. Confirm that you are using the correct telephone number for the line assigned to PhoneTree.

6. Make sure the line assigned to PhoneTree is not shared with another device that may be set to answer calls (fax machine, etc.).

OnDemand

Q. I'm trying to send a calling job but I get a message saying that my account isn't valid anymore. How did this happen and what should I do?

A. If you receive the following message when trying to send an OnDemand calling job:

"OnDemand plan is no longer valid! Please return to the OnDemand signup wizard to select a new plan."

The most likely cause is that the Promo Code that was entered when the account was created has expired.

Here's how to address the message and continue your calling job:

1. Click **OK** on the above screen.
2. Return to the PhoneTree desktop [click the Exit button on the toolbar].
3. Click on the **Admin** tab.
4. Click the **Configure OnDemand** icon.
5. Click the **Modify** button.
6. Enter the Account PIN.
7. Check the box next to **Billing Plan**.
8. Click **Next**.
9. Choose an Account Plan from the drop-down menu, then click **Next**.
10. You will see a window that says "Caution: you are changing your account type." Click **OK**.
11. The next screen will summarize the details of your chosen Account Plan. Click **Next**.
12. On the Submit screen, it will say "You have elected to change your plan type" with details about any possible credit card charges. Click the **Submit** button.
13. The last screen says "Submitted: Your changes have been accepted. You will receive a confirmation email." Click the **Done** button.
14. Click **OK** on the OnDemand Service Administrator window.
15. Click on the PhoneTree tab and click on the PhoneTree icon you were using.
16. Return to either the Call Wizard or the EasyCall screen and re-send the call job (the recording(s) you made will still be there).

Q. Can I initiate an OnDemand calling job remotely?

A. Yes, as long as you have the PhoneTree hardware. To do this:

1. Configure your PhoneTree for remote call-in by following the directions in the Configure Remote Operation section of the help files.

2. Call in using any touch-tone phone and follow the instructions as described in the Configure Remote Operation help files.

3. When you get to the Call Menu [8], press [3] to start the job using the OnDemand service.

Q. How many times will the PhoneTree OnDemand service retry numbers for unanswered calls if nobody answers the phone?

A. The OnDemand service is designed for jobs that need to be delivered very quickly and as such, will retry a maximum of 3 times (versus the default of 15 for the PhoneTree hardware).
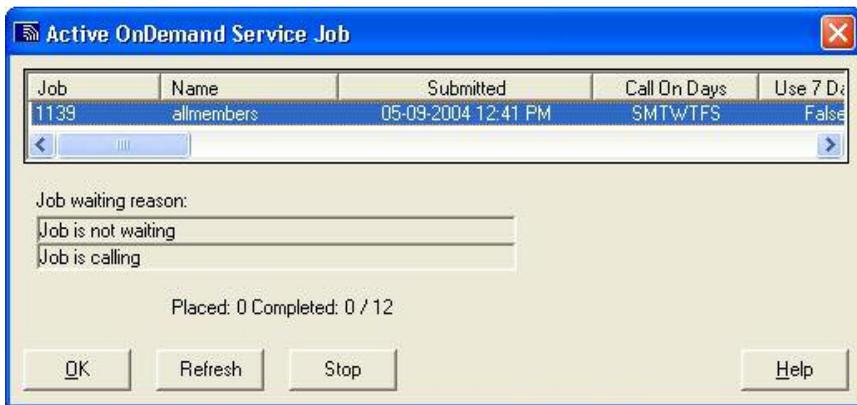
Q. I sent a calling job but it appears to be 'stuck'—nobody is being called. What should I do?

A. The first thing to try is to check the status of your job by following the directions on page 126 of this user guide. On the **Active OnDemand Service Job** screen, check to see:

1. That under **Job Waiting Reason** you see "Job is not waiting, Job is calling"

2. That the **Call Times** and **Days** are the ones you wanted for this call job and that the job was set to start calling immediately

3. How many calls, if any, have been **Placed** and/or **Completed**

If the information on this screen indicates that calls should be in progress but aren't, call our Customer Support Department at **866.234.2943**.

Q. *We've installed the PhoneTree software at work and are using the system, however I need to install the PhoneTree software on my PC at home also. Is it possible for me to do this, and if so, how do I activate the account I've already created?*

A. When you purchase a PhoneTree product with OnDemand, you are entitled to install and use the software for OnDemand calls on an unlimited number of other PCs. To do this, use the original disk and installation key to install the software on one or more other PCs.

If you purchased a hardware product, the first time you run the software on a PC without the PhoneTree hardware connected you may see the following message:

"Will you only be using the OnDemand service for making calls? Recommend: [No]"

You should click **Yes** if you intend to use the OnDemand service (and not the PhoneTree hardware) for all calls made from this PC. Clicking Yes will do two things: first, it will enable you to use EasyCall and the Call Wizard to submit a calling job using OnDemand. Second, it tells the system you will be using the sound card in your PC for message recording and playback (so be sure to connect a microphone to the microphone jack on the back of your PC and use it for your PhoneTree recordings).

Click the **No** button if you intend to connect the PhoneTree hardware to this PC later. Keep in mind that you will not be able to use EasyCall or the Call Wizard to make recordings, etc. until the hardware is connected.

Next, to activate an account you've already created, you will need the account number and the activation code from your original e-mail confirmation (see page 119). When you have that information:

1. Launch the PhoneTree software.
2. Click the **Admin** tab.
3. Click the **Configure OnDemand** icon.
4. Click the **Enter Activation Code** button.
5. Enter your account number and activation code on the dialog below:
6. Click **OK**.

7. You should now see the words "Account is activated" on the OnDemand Service Administrator screen. Now you are ready to use the system on this PC. Follow the instructions elsewhere in this user guide to initiate a calling job.

Q. Is it necessary to have a high-speed Internet connection in order to use the OnDemand service?

A. It is recommended but not required to have a high-speed Internet connection for using OnDemand. If you are using a dial-up connection, just be sure you have dialed in before submitting an OnDemand call job.

Q. I tried to send a call job but got a message saying that there was no response from the OnDemand server. What should I do?

A. The most common reason you might see this message is if your Internet connection is inactive or incorrectly configured. Verify that you have an active Internet connection by checking e-mail or bringing up a non-cached web page in your Internet browser.

Occasionally you may experience this message if there is a temporary issue with the main OnDemand system. If you have verified that your Internet connection is working correctly, wait a few minutes and then try to send the call job again.

Q. I closed an account I created and now I want to create another account using the same e-mail address. Why can't I do this?

A. For security reasons, the OnDemand system identifies each account with a single e-mail address, even accounts that have been closed. This way, if you ever wish to re-open a closed account, your account information will be restored, including the original e-mail address associated with the account.

You may not have more than one account associated with a single e-mail address, however you can re-open the closed account, change the account e-mail to a different e-mail address, save the changes, close the account again, then use the now-free e-mail for your new account.

Q. I typed in my PIN code and e-mail when sending a call job and it keeps saying the PIN code is not valid. What am I doing wrong?

A. Remember that the PIN code for the account and the PIN code for each of the users on an account are different. When you are prompted for a PIN code each time you submit a call job (see page 123) you need to enter the User PIN associated with one of the Users on the account (see page 117). You will only need the Account PIN when activating or changing an account (see page 162).

Q. How quickly will my calls be made with the OnDemand system?

A. The OnDemand server is a multi-line, high-capacity system and is being expanded on an ongoing basis. In addition, depending on the usage of the system, availability of the telephone lines can vary. At any given time, your call job will be completed in a matter of minutes vs. 60 calls per hour per phone line using the PhoneTree hardware. Check your call status reports to see when the first call was completed and when the last call was completed — this time frame will give you an accurate figure for future call sessions of the same length.

PhoneTree Client

Q. I have chosen a PhoneTree, selected my calling preferences in Call Options, recorded a message and clicked the Call List button but my new call job has not been sent to the PhoneTree Host PC. Why?

A. Make sure the PhoneTree Host PC is network enabled.

Q. I have chosen View Call List to look at the Call Status for a PhoneTree, but it only brings up a text file that says "PhoneTree Call Status results are not available for this PhoneTree." Why?

A. Make sure that **Allow Client to View Call Status** is checked on the **Advanced Options** tab of the **Call Options** dialog for that PhoneTree on the Host PC and the Remote PC (see pages 142 and 143). Also, make sure you have first chosen Update Call Results (page 146) – this pauses calls temporarily to update the call statuses for all PhoneTrees.


'Path Not Valid' Error Message

This message will appear if:

a) The Client software is being launched for the first time.

b) Any of the Initial Setup steps on pages 132-135 have not been completed (the PhoneTreeMVPu folder must be shared, the proper permissions must be set, and the path to the PhoneTreeMVPu must be set as a mapped drive).

c) Either the Host PC or the PhoneTree hardware are not properly connected or powered up, or the PhoneTree software is not in the Call Center.

'No Translator' Error Message

This message will appear if:

a) The Client software is being launched for the first time.

b) Any of the Initial Setup steps on pages 132-135 have not been completed (the PhoneTreeMVPu folder must be shared, the proper permissions must be set, and the path to the PhoneTreeMVPu must be set as a mapped drive).

c) Either the Host PC or the PhoneTree hardware are not properly connected or powered up, or the PhoneTree software is not in the Call Center.

d) The CustomImport.dat file on the Host PC has been moved, deleted or corrupted.

'Does Not Exist' Error Message

This message will appear if the path to the PhoneTreeMVPu folder is not set as a mapped drive (see page 134).

'No List Available' message

'Call Options' warning
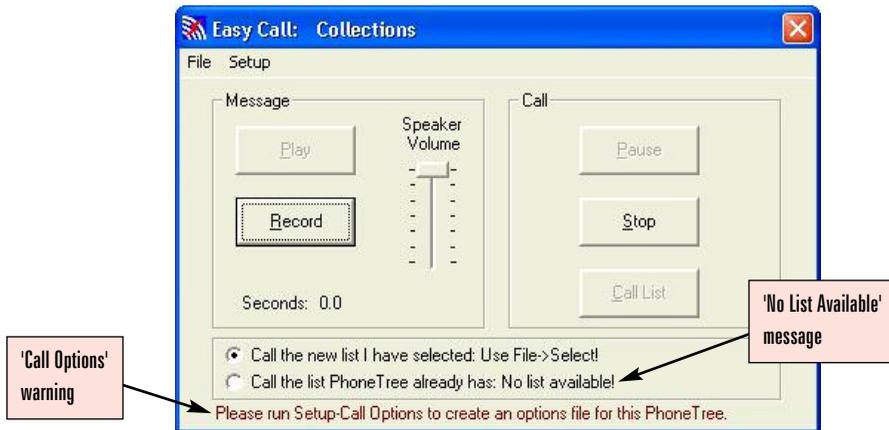
Easy Call Screen: 'Call Options' Warning Message

This message will appear if this is the first time the user has viewed this screen. Choose Call Options from the Setup menu to create the options file needed to continue.

Easy Call Screen: 'No List Available!' Message

This message will appear if there are no lists associated with the PhoneTree selected by the user ("Collections" in the example above). Usually this means that this PhoneTree has not yet been used for calling. To remove this message, use File ▸ Select to choose a local file for importing.

Note that once a file has been sent to (and used by) the PhoneTree in question on the Host PC, the words 'ClientImport.mdb' will appear here.

'Paused' Indicator Stays On After Sending a Job to a Never-Before-Used PhoneTree

The PhoneTree chosen by the Client has to have already been set up on the Host PC to import a file using the chosen translator and format. If not, the host software will "hang" in the **configure** screen of the chosen translator. To address this, either a) ahead of time, import a like file into the specific PhoneTree to be used on the Host PC, utilizing the desired translator, or b) send the job using the Client software, then go to the Host PC and configure the translator, allowing the job to continue. This is a one-time step.
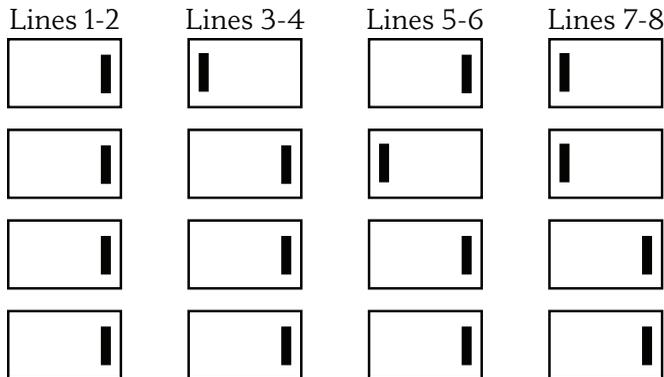
Checking DIP Switches (G2PT)

If have purchased 2 lines or less, you will not need to complete this step. If you have purchased **more** than 2 lines AND if you cannot get your PC to recognize one or more of your correctly connected phone lines, read the following:

Each PhoneTree unit has a 4 position DIP switch located on the back. The switches must be set to properly identify the unit as Lines 1-2, Lines 3-4, etc. Where possible, PhoneTree presets these switches so that you do not need to do so. If your unit is not set correctly, you will not see the lines appear correctly in your computer's **Device Manager** (see page 18), and you will need to follow these instructions:

To set DIP switches:

1. Shut down the PhoneTree software.

2. Disconnect power and **all** cables to your PhoneTree unit(s).

3. Position the PhoneTree upright on its base (see picture on page 10). Using the reference chart below, change the switches with a sharp, pointed object. For instance, if you have two PhoneTree units, set one unit to Lines 1-2 and the other to Lines 3-4.

4. After reconnecting all cables, use the **Device Manager** as described on page 18 to verify that the unit has in fact been properly identified.

DIP Switch Configurations:

| Lines 1-2	Lines 3-4	Lines 5-6	Lines 7-8

Checking DIP Switches (PT-400)

If you have purchased four lines or less, you will never need to complete this step. If you have purchased **more** than four lines AND if you cannot get your PC to recognize one or more of your correctly connected phone lines, read the following:

Each PhoneTree unit has a 4 position DIP switch inside. The switches must be set to properly identify the unit as Lines 1–4, Lines 5–9, etc. Where possible, PhoneTree presets these switches so that you do not need to do so. If your unit is not set correctly, you will not see the lines appear correctly in your computer's **Device Manager** (see page 18), and you will need to follow these instructions:

To set dip switches:

1. Shut down the PhoneTree application.

2. Disconnect power and **all** cables to your PhoneTree units.

3. Remove 4 screws from the back cover.

4. Slide the circuit board out only far enough to see the switches.

5. Change the switches with a sharp pointed object, following the directions printed directly on the circuit board in white (see photograph at right).

6. Slide the circuit board back in, making sure that the circuit board is flush with the housing before replacing the back cover.

7. After reconnecting all cables, use the **Device Manager** as described on page 18 to verify that the unit has in fact been properly identified.
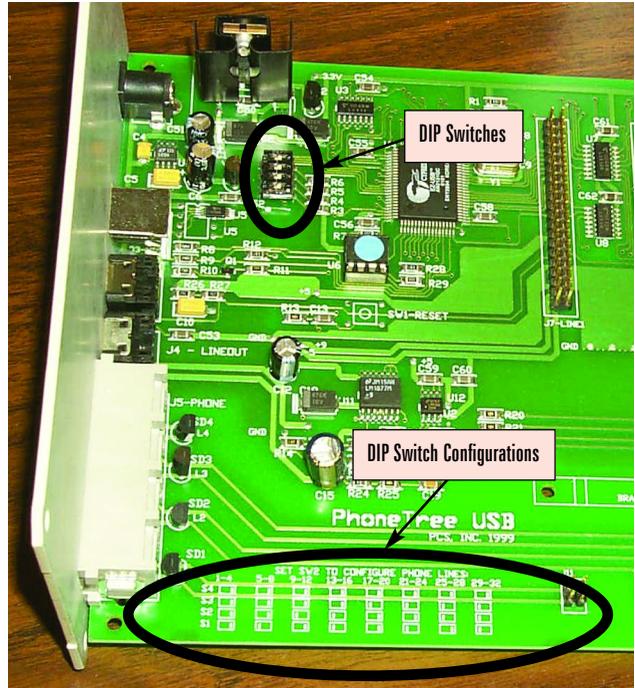
Notes

Appendices

Editing an Icon:

You can change the name and/or graphic for any icon. To do this, follow the instructions below:

First, right click on the icon you wish to change, then click **Edit This Icon**.

Next, choose a icon graphic from the **Select an icon** box. A preview will appear for each icon clicked. If you would like to change the name of the icon, enter a new name in the **Enter a name** box. When finished, click **OK**.

Text Messaging:

Q. How do I send text messages to cell phones or other devices (pagers, etc.)?

A. Sending text messages to cell phones or other wireless devices is as easy as sending an email with your PhoneTree message — all you need is the proper address in the proper format. For a list of address formats of major carriers, please visit **www.phonetree.com/texting**. These may change without notice, so be sure to verify the address with your message recipient if possible.

Example:

      Verizon Wireless: 10digitphonenumber@vtext.com (i.e. 555-555-5555@vtext.com)

Blocking Numbers:

If there is a person that is part of your list or if you have a phone number that PhoneTree should never call, you can add them to the Blocked Numbers database. As long as the phone number is stored here, PhoneTree will always block it. If you ever wish to resume calling a number, click on the grey box beside the entry you wish to remove and then click **Delete**.

There are two methods to blocking a phone number in PhoneTree:
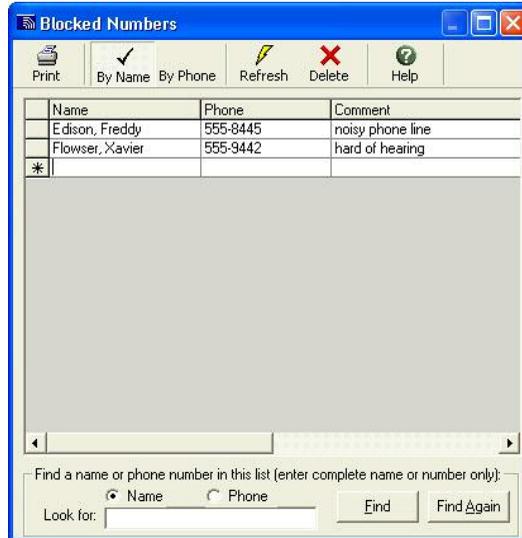
From the Admin tab:
From the Desktop View, click the Admin tab, then click Blocked Numbers. Enter the name of the person in the **Name** field, their phone number in the **Phone** field, and a comment stating why they are blocked in the **Comment** field (optional).
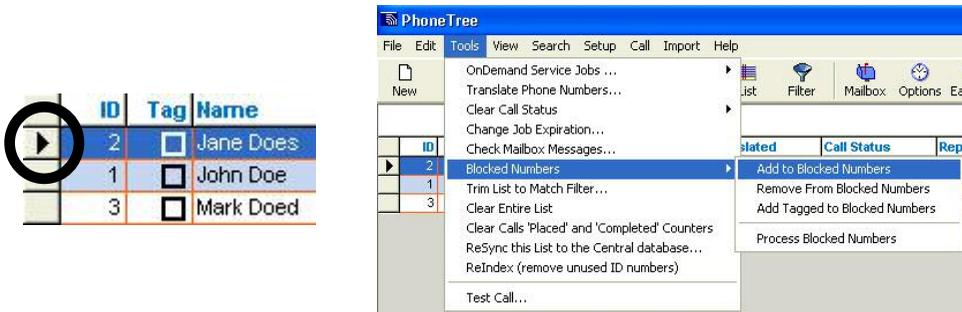
From the List Editor:
Find the person that you wish to block and click on the grey box beside their name. A black arrow should appear to the left of their name and highlight all of their information. Next, from the top of the List Editor screen, click **Tools ▸ Blocked Numbers ▸ Add to Blocked Numbers**. This will automatically add the name and the phone number of the person you just selected to the Blocked Numbers database.

Activating Line 2 for G2PT Hardware:

If your PhoneTree G2PT hardware is a one line system, you can purchase an **Activation Code** to enable Line 2 (*which will double your calling capacity*) by following these instructions.

Click **Help**, then **Activate Line 2...** from any desktop view.
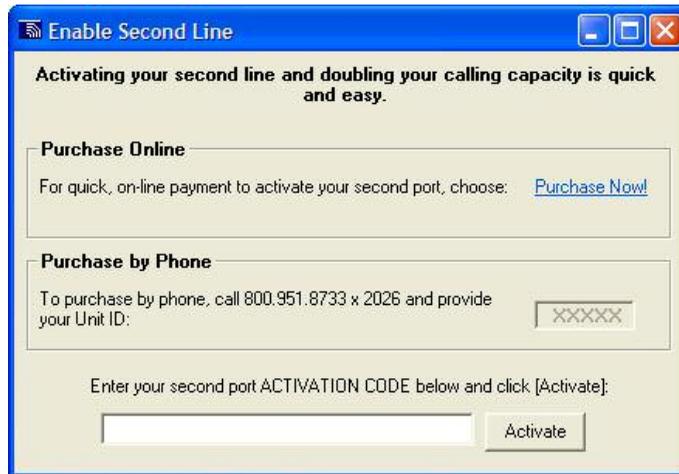
You can purchase an Activation Code to enable Line 2 either by clicking the **Purchase Now!** link (Internet connectivity required) and filling out the order form that appears or by calling us directly. Once you have the purchased the code, enter it in the **ACTIVATION CODE** box below and click **Activate**. This permanently updates the firmware in the PhoneTree unit.

Backing Up Your PhoneTree System

Once you have finalized your configurations, we recommend creating a backup. This section will walk you through the suggested way to backup the PhoneTree files, but you should also consult with your IT Administrator for any specific methods your office may use. It is a good idea to repeat these steps every time you make changes to your PhoneTree configurations.

Please Note: Keep your current **PhoneTree Installation CD** in a safe place. In the event you ever need to restore your PhoneTree system, or move it to another PC, you MUST use the same version of the PhoneTree software your backup files were created from (to identify your PhoneTree software's version, click **Help ▸ About** from any Desktop view).
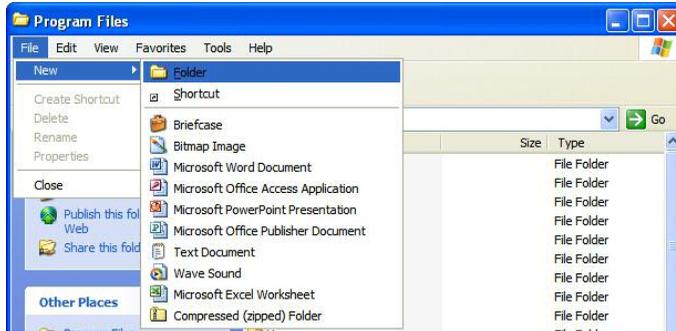
1. First, make sure no calls are being made and exit the PhoneTree software. On the PhoneTree computer, use Windows Explorer and browse to **C:\Program Files**. Next, at the top of the window, click **File ▸ New ▸ Folder**. This will create a folder named "New Folder" (should be the last folder here), right-click on it and select **Rename** from the submenu that appears. Name the folder "PhoneTree Backup ‹current version› ‹current date›" and use the current PhoneTree software version (to identify your PhoneTree software's version, click **Help ▸ About** from any Desktop view) and the current date (mmddyy) as part of the name (e.g., PhoneTree Backup 6.9.4 061909).
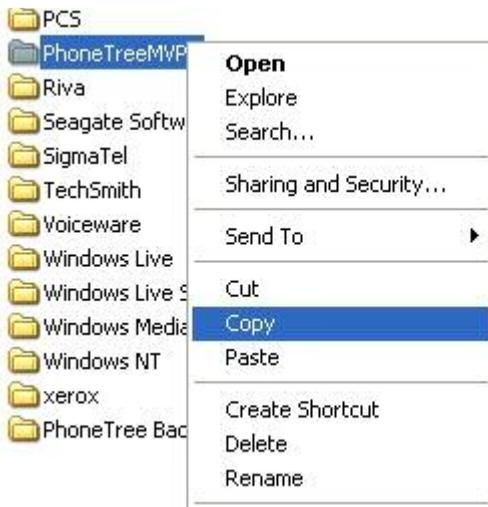
2. Next, right-click on the "PhoneTreeMVPu" folder and choose **Copy** from the sub-menu that appears.

3. Right-click on the "PhoneTree Backup" folder you created in step 1 and choose **Paste** from the sub-menu. This will copy the entire PhoneTreeMVPu folder you copied in step 2 into this folder. Once the "Copying..." window disappears, your backup is complete.

4. Copy the "PhoneTree Backup" folder to another location, such as a backup hard drive, USB flash drive or on another computer on your network. If you prefer to copy the "PhoneTree Backup" folder to a CD, make sure you first compress the folder using the Compressed Folder tool in Windows (right-click on the folder ▸ **Send to** ▸ **Compressed (zipped) Folder**) to prevent the files from being set to read-only. Then, write the zipped folder that is created to a CD.

We recommend repeating these steps every time you make changes to your PhoneTree system to keep an up to date copy of your files and configurations. As advised before, consult your administrator about backup procedures in your office.

Restoring Your PhoneTree System

To restore your PhoneTree system, you will require a **PhoneTree Installation CD** containing the same version of the PhoneTree software used to create the backup folder (see "Backing Up Your PhoneTree System" on page 174).

Please Note: If you have misplaced your **PhoneTree Installation CD**, or your copy has a later version number than your "PhoneTree Backup" folder, please contact PhoneTree Customer Support at **866.234.2943**, or by email at **support@phonetree.com**.

1. Make the most recent "PhoneTree Backup" folder available to the new computer by using one of the following two methods:

   a) Place the folder in a location on the office network where you will be able to browse to it from the new PhoneTree computer, **OR:**

   b) Create a compressed archive containing the folder, then burn the archive to a CD (creating a .zip or other archive avoids the problem of CD files being automatically set to read-only).

2. Install PhoneTree on the new computer. You must install under the user name from which you will be using the software. Do not yet launch the PhoneTree software.

3. Connect the PhoneTree hardware, including the phone cable(s), USB cable and finally, the power cable. You may receive one or more messages explaining that PhoneTree has not passed Windows Logo testing. It is 100% safe to install PhoneTree on your PC – therefore you should click the **Continue Anyway** button at these prompts.

Hardware Installation

The software you are installing for this hardware:

PCS PhoneTree USB Shared 01-04 (B)

has not passed Windows Logo testing to verify its compatibility with Windows XP. (Tell me why this testing is important.)

Continuing your installation of this software may impair or destabilize the correct operation of your system either immediately or in the future. Microsoft strongly recommends that you stop this installation now and contact the hardware vendor for software that has passed Windows Logo testing.

[Continue Anyway] [STOP Installation]

4. Before launching the PhoneTree software, copy the backed-up "PhoneTreeMVPu" folder in to the **C:\Program Files** directory on the new computer.

5. Launch the PhoneTree software. All of your call lists, messages and option preferences will be available just as they were before they were backed-up

Warranty Information

Full One Year Warranty

PCS warrants its products to be free from defects in materials and workmanship for a period of one full year from the original date of purchase.

Defective products returned to PCS will be repaired or replaced, at our option, if returned within the warranty period. PCS may use new or reconditioned parts to repair your unit.

The repair or replacement shall be warranted for either 90 days, or the remainder of the warranty period, whichever is longer.

Limitations: PCS makes no implied warranties, including those of fitness for a particular purpose or merchantability. PCS will not pay for loss of time, inconvenience, loss of use of your PCS product or property damage caused by your PCS product or its failure to work, or any other incidental or consequential damages.

State Law Rights

This warranty gives you specific legal rights. You may also have other rights which vary from state to state.

To Receive Service (In Warranty)

To receive technical assistance with your PhoneTree system, please call 866.234.2943 and you will be connected with one of our customer support technicians. They will remotely connect to your computer to see the problem firsthand and attempt to correct it. If your problem is found to be related to your PhoneTree hardware, we will provide you with a Return Authorization Number (RA#) and you will be requested to ship us the unit. An RA# is only valid up to 30 days after being issued. If this period has expired before return, there must be a new number issued before a return will be allowed. Any shipments received without an RA# will be returned to the customer.

You must pay the shipping charges to send the unit and PCS will pay the return shipping charges. Carefully package your PhoneTree hardware (we recommend using the original packing materials) along with your RA#, name, address, phone number and a description of the problem. PCS is not responsible for damage that occurs in shipping from the customer. Repair or replacement is your exclusive remedy.

Ship your unit to:
Personal Communication Systems, INC
Attn: Customer Support
2400 Reynolda Road
Winston-Salem, NC 27106

This warranty does not cover defects resulting from accidents, alterations, unauthorized repair, failure to follow instructions, misuse, fire, flood, or acts of God. Nor does PCS warrant this product to be compatible with any particular telephone equipment or switching systems.

PCS makes no other warranties expressed or implied.

Note: PhoneTree contains no user-serviceable parts.

To Receive Service (Out of Warranty)

If your PhoneTree warranty has expired and you are experiencing a technical problem, please call our customer support at 866.234.2943. You will be asked to either pay a per-incident fee or renew your Service Agreement to allow a technician to assist with resolving your issue. If the problem is found to be related to your PhoneTree hardware, there will be an additional fee to have it repaired. You will be issued a Return Authorization Number (RA#) and asked to send us the unit. Once your unit has been received and tested, a technician will contact you with the repair costs. An RA# is only valid up to 30 days after being issued. If this period has expired before return there must be a new number issued before a return will be allowed. Any shipments received without an RA# will be returned to the customer.

You must pay the shipping charges to send the unit and PCS will pay the return shipping charges. Carefully package your PhoneTree hardware (we recommend using the original packing materials) along with your RA#, name, address, phone number and a description of the problem. PCS is not responsible for damage that occurs in shipping from the customer. Repair or replacement is your exclusive remedy.

Ship your unit to:
Personal Communication Systems, INC
Attn: Customer Support
2400 Reynolda Road
Winston-Salem, NC 27106

PCS has a fixed-price repair policy (including return ground shipping). We will repair or replace, at our option, any PhoneTree unit using new or remanufactured parts and include a 90-day parts and labor warranty.

This warranty does not cover defects resulting from accidents, alterations, unauthorized repair, failure to follow instructions, misuse, fire, flood, or acts of God. Nor does PCS warrant this product to be compatible with any particular telephone equipment or switching systems.

PCS makes no other warranties expressed or implied.

Note: PhoneTree contains no user-serviceable parts.

Notes

Regulatory Information

Regulatory Information Model No. G2PT

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions:

(1) This device may not cause harmful interference, and (2) This device must accept any interference received, including interference that may cause undesired operation.

This device requires the ferrite provided in the package on the telephone line(s) to comply with FCC emission limits.

You are cautioned that any changes or modifications not expressly approved in this manual could void your authority to operate this device.

This equipment complies with Part 68 of the FCC Rules. On the bottom of this equipment is a label that contains among other information, the FCC Registration Number and Ringer Equivalence Number (REN) for this equipment. You must, upon request, provide this information to your telephone company. **(NOTE: REN is not required for some types of analog or digital facilities.)**

This equipment uses USOCs jacks RJ14.

An FCC compliant telephone cord and modular plug are provided with this equipment. This equipment is designed to be connected to the telephone network or premises wiring using a compatible modular jack which is part 68 compliant. See installation instructions for details.

The REN is useful to determine the quantity of devices you may connect to your telephone line and still have all those device ring when your number is called. In most, but not all areas, the sum of the RENs of all devices connected to your line should not exceed five (5.0). To be certain of the number of devices you may connect to your line, as determined by the REN, you should contact your local phone company to determine the maximum REN for your calling area. **(NOTE: REN are associated with loop-start and ground-start ports. Do not use for E&M or digital ports)**

If your telephone equipment causes harm to the telephone network, the Telephone Company may discontinue your service temporarily. If possible, they will notify you in advance. But if advance notice is not practical, you will be notified as soon as possible. You will be informed of your right to file a complaint with the FCC.

Your telephone company may make changes in its facilities, equipment, operations or procedures that could affect the proper functioning of your equipment. If they do, you will be notified in advance to give you an opportunity to maintain uninterrupted telephone service.

If you experience trouble with this telephone equipment, please contact Personal Communication Systems (1-336-722-5008) for information on obtaining service or repairs. The telephone company may ask that you disconnect this equipment from the network until the problem has been corrected or until you are sure that the equipment is not malfunctioning.

There are no user-serviceable parts inside.

This equipment may not be used on coin service provided by the telephone company. Connection to party lines is subject state tariffs.

INDUSTRY CANADA (IC) NOTICE

"NOTICE: The Industry Canada (IC) label identifies certified equipment. This certification means that the equipment meets telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The department does not guarantee the equipment will operate to the user's satisfaction.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

Repairs to certified equipment should be coordinated by a representative designated by the supplier. Any repairs or alterations made by a user to this equipment, or equipment malfunctions, may give the telephone company cause to request the user to disconnect the equipment.

Users should ensure for their own protection, that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

CAUTION: Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.

"NOTICE: The Ringer Equivalence Number (REN) assigned to each terminal device provides an indication of the maximum number of terminals allowed to be connected to a telephone interface. The termination on any interface may consist of any combination of devices subject only to the requirement that the sum of the Ringer Equivalence Numbers of all the devices does not exceed 5."

REN: 0.7B

WARRANTY AND REPAIR SERVICE CENTER:

Personal Communication Systems, Inc.
2400 Reynolda Road
Winston-Salem, NC 27106
866.234.2943

Regulatory Information: Model No. PT-400

This equipment has been tested and found to comply with the limits for a class B digital device, pursuant to Part 15 of the FCC rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

*   Reorient or relocate the receiving antenna.
*   Increase the separation between the equipment and the receiver.
*   Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
*   Consult the dealer or an experienced Radio/TV technician for help.

This device requires the ferrite provided in the package on the telephone line(s) to comply with FCC emission limits.

You are cautioned that any changes or modifications not expressly approved in this manual could void your authority to operate this device.

This equipment complies with Part 68 of the FCC Rules. On the bottom of this equipment is a label that contains among other information, the FCC Registration Number and Ringer Equivalence Number (REN) for this equipment. You must, upon request, provide this information to your telephone company. **(NOTE: REN is not required for some types of analog or digital facilities.)**

This equipment uses USOCs jacks RJ11.

An FCC compliant telephone cord and modular plug are provided with this equipment. This equipment is designed to be connected to the telephone network or premises wiring using a compatible modular jack which is part 68 compliant. See installation instructions for details.

The REN is useful to determine the quantity of devices you may connect to your telephone line and still have all those device ring when your number is called. In most, but not all areas, the sum of the RENs of all devices connected to your line should not exceed five (5.0). To be certain of the number of devices you may connect to your line, as determined by the REN, you should contact your local phone company to determine the maximum REN for your calling area. **(NOTE: REN are associated with loop-start and ground-start ports. Do not use for E&M or digital ports)**

If your telephone equipment causes harm to the telephone network, the Telephone Company may discontinue your service temporarily. If possible, they will notify you in advance. But if advance notice is not practical, you will be notified as soon as possible. You will be informed of your right to file a complaint with the FCC.

Your telephone company may make changes in its facilities, equipment, operations or procedures that could affect the proper functioning of your equipment. If they do, you will be notified in advance to give you an opportunity to maintain uninterrupted telephone service.

If you experience trouble with this telephone equipment, please contact Personal Communication Systems (1 336-722-5008) for information on obtaining service or repairs. The telephone company may ask that you disconnect this equipment from the network until the problem has been corrected or until you are sure that the equipment is not malfunctioning.

The user may in some circumstances repair a unit by replacing a plug-in telephone LINE board. There are no other user serviceable parts inside.

This equipment may not be used on coin service provided by the telephone company. Connection to party lines is subject state tariffs.

INDUSTRY CANADA (IC) NOTICE

"NOTICE: The Industry Canada (IC) label identifies certified equipment. This certification means that the equipment meets telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The department does not guarantee the equipment will operate to the user's satisfaction.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

Repairs to certified equipment should be coordinated by a representative designated by the supplier. Any repairs or alterations made by a user to this equipment, or equipment malfunctions, may give the telephone company cause to request the user to disconnect the equipment.

Users should ensure for their own protection, that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

CAUTION: Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.

"NOTICE: The Ringer Equivalence Number (REN) assigned to each terminal device provides an indication of the maximum number of terminals allowed to be connected to a telephone interface. The termination on any interface may consist of any combination of devices subject only to the requirement that the sum of the Ringer Equivalence Numbers of all the devices does not exceed 5."

REN: 0.9B

WARRANTY AND REPAIR SERVICE CENTER:

Personal Communication Systems, Inc.
2400 Reynolda Road
Winston-Salem, NC 27106
866.234.2943

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