



Voice **Wave**[™] Series

Revised 5/2012

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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® VoiceWave[™] Series system, including the pre-configuration steps necessary to complete before your system can send messages, 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 VoiceWave Series software.

For the latest version of this User Guide and access to product FAQ's, Customer Help Documents and other support material, please visit: **phonetree.com/support**

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	
Fax	
E-Mail	
USPS	PhoneTree
	301 N. Main Street, Suite 1800
	Winston-Salem, NC 27101

Notice of Liability

The information in this book is intended to be accurate and useful with the operation of your PhoneTree VoiceWave Series system. 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.

Trademarks

The trademarked names used in this book are used for editorial purposes only and to the benefit of the trademarked owner with no intention of infringement of the trademark. We further state that PhoneTree, Proven. Professional. Trusted., VoiceWave, PhoneTree PT-400, PhoneTree G2PT, PhoneTree Client, and the PhoneTree logo are all trademarks of Personal Communication Systems, Inc.

Installation

Step One: Check System Requirements

All VoiceWave models requires a minimum set of requirements from your system in order to work correctly. If your PC has fewer than these requirements, your VoiceWave system may not complete certain tasks well or at all.

Local Disk (C:) Proj	perties	? 🔀	System Properties		? 🛛
General Tools Ha	rdware Sharing Quota		System Restore	Automatic Updates	Remote
	_		General C	omputer Name Hardware	Advanced
intern	nal Drive			System:	
		\frown		Microsoft Wind	dows XP
Type: Local	l Disk			Professional	
File system: NTFS	5			Version 2002	
Used space:	13,288,439,808 b	12.3 GB		/. Service Pack	
Free space:	26,669,969,408 b es	24.8 GB	No.	John Doe	
Capacity:	39,958,409,216 b es	37.2 GB		00000-DEM-0	000000-00000
				Intel(F	ج)
				Pentium(R) 4 0	CPU 2.80GHz
	Drive C	Disk Cleanup		2.79 GHz, 2.90 Physical Addre	9 GB of HAM
Comprose drive to	a a su a disk an saa				
Allow Indexing Se	ervice to index this disk for fa	st file searching		Support Infr	ormation
	OK Cancel	Apply		OK Car	Apply

Minimum System Requirements

- 1.4GHz or faster processor
- Windows XP, Windows Server 2003, Windows Server 2008, Windows Vista (32-bit or 64-bit) or Windows 7 (32-bit or 64-bit)
- · 1GB of RAM (2GB for Windows 7 64-bit)
- 5GB of hard-disk space
- CD-ROM Drive
- 1024x768 or higher resolution monitor
- USB port, minimum 1 USB port for each PhoneTree unit*
- Analog phone jack for each PhoneTree line
- High-speed Internet access (in case of any future support/training needs from PhoneTree Customer Support)

*A maximum of 24 lines per host controller card. If all of your USB ports are in use, you may need to purchase a true dual (or quad) host controller card to provide additional ports.

**VoiceWave uses secure 128-bit SSL encryption when sending and receiving data from our servers.

Please Note: All VoiceWave models are designed to allow operation in the background however, we cannot guarantee compatibility or problem-free operation with other programs.



Step Two: Install the Software

Please Note: Before installing the VoiceWave software, ensure the intended Windows® operating system user is a part of the Local Administrative Group and for computers running Windows Vista® or Windows® 7, refer to the installation document included in the PhoneTree package, or download a copy from our website: **Installing on Windows 7** / **Installing on Windows Vista**.

1. Installation CD

Insert the **VoiceWave Installation CD** into your CD/DVD drive. The installer screen should start automatically (if it does not, double-click on the CD/DVD drive ► PhoneTreeMVPu ► setup). Click **Next** and follow the on screen instructions. When prompted, enter the supplied **Serial Key** (found on the inside of the software case) and click **Next** to continue the installation process. Once the installation completes, click **Finish**. If requested, restart your computer – do not start the VoiceWave software at this time.

2. Female and Male Voice Text-to-Speech CDs

First, insert the **Female Voice** CD into your CD/DVD drive. The installer screen should start automatically (if it does not, double-click on the CD/DVD drive ► setup). Follow the on screen instructions to complete installation. Repeat these steps for the **Male Voice** CD.



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 unit'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 unit's power adapter jack (c) and then insert it into a wall power outlet or power strip. **IMPORTANT**: Use of a third-party or universal power adapter can cause damage to your PhoneTree hardware and will invalidate your warranty. If a replacement power adapter is needed, please contact PhoneTree Customer Support at 800.555.0559 or support@phonetree.com.

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 have been pre-configured 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 154.

Installation: Connect the Hardware, continued



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 unit'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 unit's power adapter jack (c) and then insert it into a wall power outlet or power strip. **IMPORTANT**: Use of a third-party or universal power adapter can cause damage to your PhoneTree hardware and will invalidate your warranty. If a replacement power adapter is needed, please contact PhoneTree Customer Support at 800.555.0559 or support@phonetree.com.

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 pages 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



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 Phone-Tree 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/Windows 7

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.

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 units you have. For example, if you have ordered a 4-line VoiceWave 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.



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



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.

Duplex Analog Wall Jack (1-Line PhoneTree Unit)



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

Duplex Analog Wall Jack (2-Line PhoneTree Unit)



Connect the PhoneTree unit to the 4wire 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 software configurations for your VoiceWave model, we recommend that the following steps are completed. These steps have been designed to help ensure that VoiceWave operates at its fullest potential on your computer.

Step One: Verify Device Connection

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

For Windows XP users:

1. From your Desktop, right-click on the My Computer icon and choose Properties. Click on the Hardware tab and then click the Device Manager button.

For Windows Vista/Windows 7 users:

1. From your Desktop, click Start (Windows logo) and in the Search bar enter "device manager." From the results that appear, click on the Device Manager link.



- 2. Locate Universal Serial Bus controllers.
- 3. Click on the "+" sign next to its icon.
- 4. 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 154).

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

Step Two: Disable Power Management

For Windows XP, Windows Vista and Windows 7:

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:

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



- 2. Click the Power Management tab.
- 3. Disable Allow the computer to turn off this device to save power (see picture at right).
- 4. Repeat Steps 1-3 for each USB Root Hub in your Device Manager.
- 5. Click **OK**, and close the Device Manager.



Pre-Configuration Steps: Turn Off PC Hibernation

Step Three: Turn Off PC Hibernation

For Windows XP:

The Windows hibernation or another power management function sometimes interferes with the operation of your computer when left idle, which can cause issues when using any version of VoiceWave. To resolve this:

- 1. Right-click on a blank area of your desktop and choose **Properties**.
- 2. Click on the Screen Saver tab.
- Disable your screen saver by choosing "None" from the drop-down, then click the Power button (see picture at right).
- 4. 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.

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Themes Desktop	Screen Saver	Appearance	Settings	
	Territoria de la competitiva de la comp			
	gines			
	i i i i i i i i i i i i i i i i i i i	•17		
	States	Second Second	2	
			0	
			0	
Screen saver		Settin	os l	Preview
Screen saver		Settin	gs	Preview
Screen saver (None) Wait: 45 \$	minutes 🗌 Or	Settin	gs vord proter	Preview
Screen saver	minutes 🗌 Or	Settin	gs word proter	Preview
Screen saver	minutes Or To adjust mon click Power.	Settin n resume, passe itor power setti	gs vord proteinngs and sa	Preview ct ave energy,
Screen saver	minutes Or To adjust mon click Power.	Settin resume, passe itor power setti	gs vord proteinings and sa	Preview ct ave energy, Power
Screen saver	minutes	Settin resume, passe itor power setti	gs vord proteinings and se	Preview ct ave energy, Power

ver Schemes	Advanced	Hibernate	UPS	
Selec this co the se	t the power : omputer. Not elected sche	scheme with te that chang me.	the most appropr ing the settings b	iate settings for elow will modify
Power scheme	98			
Minimal Powe	er Managem	ent		*
		ſ	Save As	Delete
		,	ouromon	00000
Settings for Mi	nimal Power	Managemer	t power scheme	
Turn off monit	or: 1	Vever		*
Turn off hard	disks:	Vever		~
System standt	ay: T	Vever		~

5. Make sure the **Enable hibernation** option is NOT selected on this Hibernate tab. Click **OK**, then click **OK** on the **Display Properties** screen.

When your computer hitemates, it stores whatever it has in memory on your hand disk and then shuts down. When your computer comes out of hitemation, it returns to its previous state Hitemate Enable hitemation Disk space for hitemation Free disk space: 37,510 MB Disk space required to hitemate: 3,063 MB	ower Schemes	Advanced	Hibernate	UPS	
Hibernate Place has been ation Disk space for hibernation Free disk space: 37,510 MB Disk space required to hibernate: 3,063 MB	When memo compu	your comput ny on your ha uter comes o	er hibernate rd disk and t ut of hiberna	s, it stores whatever it hen shuts down. Whe tion, it returns to its pr	has in en your evious state
Enable hibernation Disk space for hibernation Free disk space: 37,510 MB Disk space required to hibernate: 3,063 MB	Hibemate				
Disk space for hibernation Free dask space: 37,510 MB Disk space required to hibernate: 3,063 MB	Enable hib	emation			
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Free disk space: 37,510 MB Disk space required to hibernate: 3,063 MB	Disk space for	nibernation			
Disk space required to hibernate: 3,063 MB	Free disk space	e: 37,5	IO MB		
	Disk space re	quired to hibe	emate:	3,063 MB	

Pre-Configuration Steps: Turn Off PC Hibernation, continued

For Windows Vista/Windows 7:

- 1. Right-click on a blank area of your desktop and choose **Personalization**.
- 2. Click on the Screen Saver link.
- 3. Disable your screen saver by choosing **None** from the drop-down menu, then click **Change power settings**...



- On the Power Options screen, under Select a power plan, click Change plan settings for the current power plan you are using.
- Once on the Edit Plan Settings screen, set dropdown menus for Turn off the display and Put the computer to sleep to Never. Next, click on Change advanced power settings.

Change settings for the p	lan: PC power			
Choose the sleep and display sett	ings that you want yo	ur computer to use		
Turn off the display:	Never	•		
Put the computer to sleep:	Never	•		
Change advanced power settings				

6. 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.



Pre-Configuration Steps: Get a Copy of Your Phone Book



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 your VoiceWave system 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 G2PT Hardware Operation (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 unit will use the built in LEDs to display the activity. Below is a description for each LED and how it functions:





- 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 the PhoneTree unit has power, regardless of whether it is making calls or not.

Interference

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





PT-400

Always make sure the green power light is on to be assured that your VoiceWave 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.



Interference

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



One-Time Configurations

PhoneTree V6	Usla				
PhoneTree	Tools	Tasks	Admin	Call Center	Voice Wave ™
PhoneTree 1					VOICEWAVE
All calling is stopped. The	CallCenter must be acti	ve for PhoneTree to sen	id or receive calls.		h

Desktops

Upon opening your version of the VoiceWave 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 VoiceWave software. Before you start configuring your VoiceWave model, please read the brief description for each tab to help you understand its specific function:



One-Time Configurations: The Admin Desktop



The Admin Desktop

To start the basic configuration of your VoiceWave model, click on the **Admin** tab from the Desktop View to access the **Admin Desktop**.

The Admin Desktop contains several icons (*varies with model*), some of which globally control how the system 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 setup.

Help Files - Detailed information on features and/or icons not discussed in this User Guide can be found from within the Help Files built into all versions of the VoiceWave software. To access instructions on how to use a specific part of the software, click **Help** from that 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 your VoiceWave model 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** (*digits that must be dialed before the phone number*) and/or a **Suffix** (*digits 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 lines are set up, connect the phone lines you intend to use, 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 as is. *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.*

Configure Ph	one Lines	
Select line: • Detected	Use different settings at night	Night is from: 05:30 PM until 06:00 AM
1 2. -3. -4.	Line use: C Answer calls only C Enable this line to: C Answer calls only C Enable this line to: C Answer calls only Make calls C Use this C Wait for dialtone before dialing C Touchtone dialing C Pulse dialing Optional line access and billing codes: Prefix: BT Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: Suffix: C Answer calls only Prefix: C Pulse dialing C Pulse dialing	
<u>0</u> K	Cancel Defaults Test Line	<u>H</u> elp

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 you have a multi-line PhoneTree unit, 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.

One-Time Configurations: Configure Global Settings



Step Two: Configure Global Settings

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

Globa	l Setti	ngs	
Dialing	Misc	Call Center Desktop Microphone Software Updates Emailer	
Nan	ne of yo	ur organization (appears on printed reports):	

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

Your VoiceWave model can automatically print, save as a file or e-mail reports for your message job results (see page 100). Enter the time you want your reports to generate in the **Enable daily file** maintenance to run at box (default time is 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.

■ Global Settings	X
Dialing Misc Call Center Desktop Microphone Software Updates Emailer	1
Use the sound card in my PC to record/play messages	
Microphone style:	
C Microphone only	
Microphone in headset	
C Custom	
Set the record volume for your microphone. Choose 'Microphone only' for most units purchased before 07-2002. Choose 'Microphone in Headset' for units purchased after 07-2002. Choose 'Custom' to enter your own settings (pick values that produce pleasing recording volumes).	
DK Cancel Defaults	elp

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.

One-Time Configurations: Configure Dialing Translator

123	1
456	
789	
	J

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 your VoiceWave system 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 your VoiceWave system 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.

One-Time Configurations: Import Menu Manager



Step Four: Import Menu Manager

Click the Import Menu Manager icon.

If you have a list of names and numbers stored in a file, your VoiceWave system 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.

Import Menu Manager		
Installed translators: (for import Click to see details: Fixed Column CSV ASCII Central database Report Reader	Ing data in a specific format) ✓ Details: ✓ Display in drop down menu Display as: (in drop down menu) Fixed Column Translator: FixedImport.exe When importing, look for files with this extension: (eg: *.*, *.doc, etc.) *.* Template (ie: MyTemplate.mdb):	Select a translator to install: ACSImport exe Ascilimport exe CentralDatabaseImport exe Charverware.exe CSVImport exe FixedImport exe ServantKeeper.exe Sheblymport.exe TotalChurchImport.exe

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 **Install**. 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.



Step Five: Configure Email

Click on the **Configure Email** icon.

Your VoiceWave system can be configured to send e-mail and/or FreeText[™] messages (*VoiceWave Plus and VoiceWave Premium only*) to people in your lists and/or send a copy of an AutoReport to someone in your organization (see page 100). 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 Microsoft Outlook or Microsoft Outlook Express.

User Information		Server Inf	ormation	
Your Name: E-mail Address:	Jane Doe janedoe@northwest.net	Hostname:	email.server.com	
Logon Information		Test Settings		
User Name: J Password: G	Jane Doe	After filling of screen, it is settings by Network Co	out all of the information on this recommended that you test your using the buttons below. (Require nnection)	ŝ
		Test E	-Mail Settings	
			More Settings	1

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 your VoiceWave system.

 $E\text{-}mail\ Address\ -$ 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 VoiceWave system. 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 your VoiceWave 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 VoiceWave system 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 103 for more information on Tasks.



Remote Operation lets you call in to your VoiceWave system and access most major functions including recording your message, selecting whom to call, changing the calling times, and more (see page 117).



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

One-Time Configurations: Additional Icons, continued



Record Greeting (Hello) allows you to create your own greetings or preview the pre-recorded greetings included with your VoiceWave system.



Blocked Numbers stores any phone number hand-entered into this database or selected from the List Editor screen (see page 159).

VoiceWave Plus and up:



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



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

VoiceWave Premium only:



Configure Flex Fields gives you the ability to configure parts of your message to change based on the data your VoiceWave system 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 PhoneTree icons 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
Sending Your First Message Job

Your First Message Job

In the previous sections, you were shown the necessary steps to prepare your VoiceWave system to send messages. Next, we suggest that you try making a test call to yourself to be sure a call can be completed 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 chapter, refer to your VoiceWave model's chapter to access additional configurations that will help you to customize your VoiceWave system to meet your specific needs (see page 40).

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

Vavigation Configure Help	Tools	Tasks	Admin	Call Center	1 From the Desktop View, click on the
PhoneTree 1	Click th	ne <mark>PhoneTree 1</mark> io	01.		PhoneTree tab, then, click on PhoneTree 1.
PhoneTree You have no call list se	ok OK fo en, enter r call list	X to create a new file or the box that a name for th and click OK	appears.	Name New I Save File as: Blue Ridge G Existing Files:	File As

- 51	Phor	ie i ree															
Fil	e Edit	Tools	View	Search	Setup	Call	Import	Help									
	D New) Open	Print	A	dd R	×	Find	tist [🌱 Filter	Mailbox	Options	5 EasyCall	לע Wizard	2↓ ASC	Z↓ DESC	🥏 Exit	
				Я				Blue	Ridg	je Gro	up						
	ID	Tag N	lam		Pho	ne		Translated		Call Status		Replies		Last Call	Time	Last Ca	I Date
[Cli	ck Au	dd.														





Sending Your First Message Job, continued

	and relief	
After the Add Person window appears, enter your name and corresponding phone number for this test message job. Repeat for any additional entries you wish to make. Click OK when finished.	Enter required information: Name: John Doe Phone: 336-555-4444 Enter optional information:	
	Phone is required DK Add Hell	

Add Darear



You will now see your name and phone number added to the list. You will also see a 5 You will now see your name and phone number and a Call Status displayed. The Translated phone number and a Call Status displayed. The Translated phone number have using the rules column shows exactly how your VoiceWave system 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 was encountered during that phone call (i.e., Ans by Person, Ans by Machine, BUSY, etc.). For a complete list of Statuses, see page 95.

Sending Your First Message Job, continued



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 satisfied with your recorded message, click Call to launch your message job.

After you click Call the Call Center will launch:

- For information on what the Call Center is and how it functions, see page 93.
- If you would like to generate a report showing your call results once your calls are finished or configure your VoiceWave system to automatically do this for you, turn to page 97.

Congratulations, you have completed your first message job!

As stated before, EasyCall is one of two methods for launching your message 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 FreeText messaging and e-mail messaging (VoiceWave Plus and VoiceWave Premium models only). To take advantage of the Call Wizard and additional configurations for your VoiceWave model, please refer to the corresponding page number:

VoiceWave - Page 41

VoiceWave Plus - Page 51

VoiceWave Premium - Page 63

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.

VoiceWave

VoiceWave

Now that your VoiceWave system is configured to work with your phone lines and dialing rules in your area, you can begin to set up your message. On the following pages you will be shown, stepby-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 after you have configured your call times and other options, please see page 40.

Help Files - Since this section only covers the basic call setup, some options and features are not discussed thoroughly. For more information regarding an option or feature, click **Help** on the corresponding screen.

In order for VoiceWave to make or receive phone calls, the Call Center must be running during your preset call times (see page 94).

Setting Up a Message Job:





ile Edit Tools View Search Setup Call Import Help New Open Print Add Revove Solution Coptons EasyCall Wizzer ASC Click Import. Ue Ridge Group	View Search Setup Call Import Help Print Add Revove CSV Ascritic Central database Report Reader Click Import, then choose CSV. Translated Call Status Replies	M Phone	Tree Phor	neTree 1						
Image: Constraint of the second se	Print Add Revove Fixed Column Signal Signal Click Asc Asc Click Import, then choose CSV. U Reduce Group Translated Call Status Replies	File Edit	Tools View	Search Setup	Call Im	port Help				
New Open Print Add Refore CSV ACCII Central database Report Reader Click Import, UE Ridge Group	Print Add Revove CSV Add Revove ASCII ASCII Central database Report Reader Click Import, then choose CSV. Translated Call Status Replies		🎽 🗳	· · +	X	Fixed Column				
ASCII Central database Report Reader Lick Import, ue Ridge Group	ASCII Central database Report Reader Click Import, then choose CSV.	New C	Open Print	t Add R	enove	CSV				
Lalbox Options EasyCall Wizard ASC Central database Report Reader Click Import, ue Ridge Group	Click Import, then choose CSV.	-	(7) K4	20 /		ASCII				
Click Import, ue Ridge Group	Click Import, then choose CSV.		oficers Facul		Z¥	Central databas	e			
Click Import, ue Ridge Group	Click Import, then choose CSV. Translated Call Status Replies		puons Lasyc		SC .	Report Reader				
Lick Import, ue Ridge Group	then choose CSV. Translated Call Status Replies									
de ridge Group	then choose CSV. Translated Call Status Replies		Click	(Import,	U A F	Ridge Gr	aun			
then choice I'SV	Translated Call Status Replies		thon	chansa CSV	uer	tuge On	Jup			
ID Tag LIIGH GHOUSE GOV. Translated Call Status Replies		ID	Tag LIIEII	CII0026 C34	·	Translate	d (Call Status	Replies	
	٩	1								•

Now it is time to 3 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 commaseparated values (CSV) formatted file. Click Import at the top of the screen and then choose CSV (if your file requires a different translator other than CSV, please choose that instead).





6 The CSV translator appears. Using the drop-down menus for Last Name, First Name and Phone, select the corresponding data. Then, click OK.

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

After your data finishes 7 importing, you should see your call list appear as shown here. Make sure all intended fields were imported correctly. Note: Certain fields are not available in the Entire List view. To create a custom view to add or remove fields, see page 113.

To add a person to the list after the file has been imported, click Add from the top toolbar. To remove a person, click on the person's name and then click Remove.



8 Click on th	ne Option s	s icon :	from tl	ne top	toolbaı	r. Op	😗 otions		
c	all Options								
1	Times/ Days Call	Settings Tr	ansfer Adv	Options Ad	lv Dialing F	Remote Cop	y Central D	atabase	
Click on the Don't call before/after times to set when VoiceWave	Allow calls on: Don't call befor Don't call after:	✓ Sun 08:30 AM		e • AM AM PM PM	Ved 08:30 AM	Thu 08:30 AM 08:30 PM	Fri 08:30 AM	✓ Sat 08:30 AM 08:30 PM	
starts and stops calling.	Use Night Message after:	05:30 PM	05:30 F 4 ferent times f	05:30 PM	05:30 PM	05:30 PM	05:30 PM	Disable any d	ay you don't
	Calliab stans who		ΓD	elay start of c	all job until:	Г	Temporarily (want to make	calls on.
	Call job is done	en.	Ŧ	\mathbf{A}			Ĺ		
	,	Usi cha	e the up an ange the h	nd down a our and n	irrows to iinutes.]			
h	take calls only betwe IMES FOR EACH DA	en the DON'T AY only if you i	CALL BEFOR need to call du	IE and DON' uring different	times for eacl	H times. Chei h day of the w	ck ALLOW DI /eek.	IFFERENT	

8a

The **Time/Days** tab allows you specify which days of the week and what time during those days you want to make calls.

Disable 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 every day of the week, click on each of the time fields under Sun. Use the arrows to adjust the hours and minutes for each time field. To set individual times for each day, enable Allow different times for each day and set each "before" and "after" time as desired.



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. Disable if this is not desired.

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

Set to Name and phone #.	Call Settings Transfer Adv Options Adv Dialing Remote Copy Central Database plicates with same: # Create export file for use by another application duplicates Call logging Log ALL Calls all numbers in d number list Deliver message to answering machines:: Deliver message to answering machines: Advo call each day	
<u> </u>	<u>C</u> ancel <u>D</u> efaults <u>H</u> elp	

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

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



 $\label{eq:click} Click \mbox{ on the } Wizard \mbox{ icon from the top toolbar}.$



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.

	The Call Wizard will guide you through the a	advanced messaging options.	
	Message Options:		



Upon opening the Call Wizard, enable Make a call. Then, click Next.

Required: IV Standard (your default message) Optional: IV Night (alternate message after hours) (alternate message to ans. machines) (request 'S' to confirm call delivery) (give more information after pressing #)	Select the	message(s) you v	wish to record: (check all that apply).
Optional: ✓ Night ✓ Machine ✓ Intro w/9 ✓ More Info ✓ More Info ✓ (give more information after pressing #)	Required:	🔽 Standard	(your default message)
Image: Wachine (alternate message to ans. machines) Image: Wachine (request '3' to confirm call delivery) Image: Wachine (give more information after pressing #)	Optional:	🔽 Night	(alternate message after hours)
✓ More Info (give more information after pressing #)		Machine	(alternate message to ans. machines) (request '9' to confirm call delivery)
		More Info	(give more information after pressing #)



Choose which message options you would like to add in addition to your outgoing message (for detailed information on each of these options, click **Help**), then click **Next**.

lay	🍠 Edit	Ma New	Copy	Delete	Volume	🕜 Help			
9		Sel cor	ect each htrois ab	n message ty ove to record	be below an and play, ci	d a corresponding reate a new mess	g message to play age, or delete sel	v. Use the lected messages.	
4/1	<i>d</i>	Sel	ect:						
			C	Greeting	Hel	lo.wav			
			۰	Standard me	ssage 🛄		-		
			С	Night			•		
			С	Ans. machin	e 🗌		•		
			С	Intro (confirm	w/9)		-		
			C	More info			•		
					· · ·				

9c The message options selected on the previous screen will determine which drop-down menus (i.e., Night, More Info) appear here. First, select the **Standard message** box. Then, click **New** from the top toolbar. Enter a title for the message in the screen that appears and click **OK**. Repeat for each additional message option.

lay	Record	New C	opy De	elete Vol	ume	🕑 Help				
	2	Any me Select control	ssages in each mess s above to	RED have n sage type be record and p	ot been low and play, cre	recorded! a corresponding me ate a new message	essage to p , or delete :	lay. Use th selected m	ne nessages.	
		Select:	G Greet	ing	Hello).wav	•			
		, j	Stand	lard message	Mee	ting Reminder.wav	-			
			C Night				-			
			C Ans. r	machine			•			
			C Intro ((confirm w/9)			•			
		1	C More	info			•			

901 Next, 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**.

1/1	Select	t.			
	10	Notify	Entire List	-	
		C Resume	Intire List Fagged		
		C Save chan	ges and exit		



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 message job.

Confirm	n Start Job 🛛 🔀
⚠	You are about to contact 16 people using the view: Entire List of the Blue Ridge Group.mdb list.
	(The final count may be reduced after removal of duplicates, blocked numbers etc.)
	Do you wish to continue?
	Yes No
	🦵 Dont show this dialog again.

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 the Call Center will launch:

- For information on what the Call Center is and how it functions, see page 93.
- If you would like to generate a report showing your call results once your calls are finished or configure your VoiceWave system to automatically do this for you, turn to page 97.

Notes

VoiceWave Plus

VoiceWave Plus

Now that your VoiceWave system is configured to work with your phone lines and dialing rules in your area, you can begin to set up your message. On the following pages you will be shown, step-by-step, how to import your list using a file, configure the call times, record a message, set up e-mail messaging, FreeText 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 after 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*).

Help Files - Since this section only covers the basic call setup, some options and features are not discussed thoroughly. For more information regarding an option or feature, click **Help** on the corresponding screen.

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

In order for VoiceWave Plus to make or receive phone calls, the Call Center must be running during your preset call times (see page 94).

Additional Admin Desktop Features (VoiceWave Plus and up):



PhoneTree Administrator

The PhoneTree Administrator tool allows you to manage all of the PhoneTree icons under the PhoneTree tab. Here, you can rename, password-protect, lock or change the number of PhoneTree icons 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.

🔊 Confi	gure Langu	iage Codes	×
Print	O Help		
#	Lang code	Language	
0	E	English	
1	S	Spanish	
2			
3			
4			
5			
6			
7		-	
8			
9			
10			
11			
12			
13		-	
14	2		
15		-	_
16		-	
17			
, 1 10			
<u></u> K			

Each language that will be used with your PhoneTree will need to be entered and assigned a code to represent it (e.g., "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 Message Job:



From the Desktop View, click the **PhoneTree** tab, then click on a **PhoneTree** icon. The remaining PhoneTree icons can be used for additional call lists (up to 256 icons are available by using the PhoneTree Administrator, see page 34).





Now it is time to 3 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 comma-separated values (CSV) formatted file. Click Import at the top of the screen and then choose CSV (if your file requires a different translator other than CSV, please choose that instead).

Look in: Desktop My Documents My Computer My Network Places Browse to the file to import. Click Open. My Documents My Documents Image: Structure of the

Import Data		
What would you like to do with the imported data?		
Overwrite existing file Append to existing file Create new file		
	Wait for Configure	X
5 A window will appear asking you what	Click CONFIGURE to make	e changes
existing file. When the next window appears, click Configure before the timer expires.	Import will continue 7 s	seconds
	Configure	Run Now

Select File Type: COMMA Separated O TAB Separated	Skip 0	✓ Header Lines	Fixed Fields: ID
Select how Name is imported C Last, First C First Last ⓒ Full Name	C AC+ Phon	none # imported e	not used ▼ Language not used ▼
Last/Full Name: First Name: Deborah Turner 💽	Area Code:	Phone: (555) 555-5674	- E-Mail Address debturner@phonetree ▼ PIN not used ▼
Text Import Fext Number Text Provider (555) 555-2211 V not used V]		

The CSV translator appears. Using the drop-down menus for Last Name, First Name, Phone, Email Address (if available) and Text Number (if available), select the corresponding data, and then click OK.

	ID	Tag	Name	Phone	Translated	Call Sta
Þ	1		Adams, Meghan	(336) 555-9475		Not Calk
	2		Anderson, Rebecca	(336) 555-9949		Not Calk
	3		Forester, Lauren	(336) 555-8938		Not Calk
	4		Gonzales, Jessie	(336) 555-7911		Not Calle
	5		Horton, Maria	(336) 555-5579		Not Calk
	6		Morton, Carrie	(336) 555-4741		Not Calle
	7		Mory, Julia	(336) 555-3354		Not Calk
	8		Motsinger, Jenna	(336) 555-4354		Not Calle
	9		Nostitz, Carol	(336) 555-2112		Not Calk
	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 Calk

E-mail	Text Number	Text Provider
gatorbreath@hottm;	555-555-9475	Verizon
batman2@AOHL.co	555-555-1212	Sprint PCS
ForesTrees@hottm:	555-555-8938	Sprint PCS
Kicker@sokker.com	555-555-9832	T-Mobile

After your data finishes importing, you should see your call list appear as shown here. Make sure all intended fields were imported correctly. Note: Certain fields are not available in the Entire List view. To create a custom view to add or remove fields, see page 113.

To add a person to the list after the file has been imported, click **Add** from the top toolbar. To remove a person, click on the person's name and then click **Remove**.

If you imported text numbers in step 6 and intend to use the FreeText feature (see pages 58 & 61), select the corresponding carrier for each number in the Text Provider column. If you don't know the carrier for each number, speak with the person who the number belongs to, or use the VoiceWave Online Integration feature to send true SMS text messages (see page 89). Note: If a certain carrier isn't listed, please contact PhoneTree Customer Support.

8

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

3
Options

Allow calls on:	I Sun	Set Time	e 🔽 Wed	I Thu	Fri Fri	Sat
Don't call before:	08:30 AM	크크 ° AM	AM 08:30 AM	08:30 AM	08:30 AM	08:30 AM
Don't call after:	08:30 PM	100.301 M 100.30	9 PM 08:30 PM	08:30 PM	08:30 PM	J 08:30 PM
Use Night Message after	05:30 PM	05:30 PM 05:30	0 PM 05:30 PM	05:30 PM	05:30 PM	05:30 PM
Call job stops who	en:	∣ Delaysta ▼	art of call job until:	10	l emporarily p	ause calls:
Call job is done						
Call job is done						

8a

The **Time/Days** tab allows you to specify which days of the week and what time during those days you want to make calls.

Disable 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 every day of the week, click on each of the time fields under **Sun**. Use the arrows to adjust the hours and minutes for each time field. To set individual times for each day, enable Allow different times for each day and set each "before" and "after" time as desired.

all connection options: Max number of rings	6	Job priority: Mid
Max number of call attempts to unanswered numbers:	15	- Within call options: ↓ Allow star (*) key to repeat message
Hang up if an Ans Machine message is longer than (sec):	25	 Enable detection of early hang-ups active for 10 seconds of message. Bypass ans machines on first call attempt
Wait this long after message for touch tone reply (sec):	2	Count "9" replies and stop calls:



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. Disable if this is not desired.

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

mes/Days Call Settings Tra	Insfer Adv Options Adv Dialing Remote Copy Central Data Export data Create export file for use by another application Allow network clients to view call status of this list: Call logging: Log ALL Calls Deliver message to answering machines: Always Daily calling: Auto call each day	
--------------------------------	---	--



Click on the Adv Options tab.

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



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 FreeText messages, 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 four types of messages you can configure in the Call Wizard: Call, Text, E-mail, and Multi-Lingual. 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 four at once, if you choose. **Note:** The Multi-Lingual message requires the Call message to be configured at the same time in order for it to properly work; Call, Text and E-mail alone do not.

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



To send a Call Message

9a

Upon opening the Call Wizard, enable Make a call. Then, click Next.

To send a FreeText[™]

Upon opening the Call Wizard, enable Send a FreeText[™] Message. Then, click Next.

To send an E-mail Message

Upon opening the Call Wizard, enable Send an e-mail message. Then, click Next.

To send a Multi-Lingual Message

Upon opening the Call Wizard, enable Check if you wish to create multi-lingual messages, then click Next.

For instructions on how to enable and use the Social Media Sites feature, see page 83.

	Select the	message(s) you v	vish to record: (check all that apply).	
	Required:	🔽 Standard	(your default message)	
$(/ \wedge)$	Optional:	🔽 Night	(alternate message after hours)	
		🔽 Machine	(alternate message to ans. machines)	
\sim		🔽 Intro w/9	(request '9' to confirm call delivery)	
		✓ More Info	(give more information after pressing #)	
		🔽 TT Respons	se (Message change on TT receipt)	



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**.

Select each message type below and a correspondin controls above to record and play, create a new mes Create a message of each type for each available lar Select:	ng message to play. Use the ssage, or delete selected messages. English nguage at the right.
Standard message	
C Night	
C Ans. machine	•
C Intro (confirm w/9)	-
C More info	_



Standard Message continued...

The message options selected on the previous screen will determine which drop-down menus (i.e., Night, More Info) appear here. First, select the **Standard message** box. Then, click **New** from the top toolbar. Enter a title for the message in the screen that appears and click **OK**. Repeat for each additional message option.

) Play	Record	New (Dopy Delete	Volume Help			
		Any me Select control	essages in RED each message t Is above to recor	have not been recorded! ype below and a correspond d and play, create a new me	ng message to play. L ssage, or delete selec	Ise the ted messages English	•
		Create Select	a message of ea C Greeting	ach type for each available la Hello.wav	nguage at the right.		
			 Standard m 	nessage Meeting Reminder	wav		
			C Night		•		
			C Ans. machi	ne	•		
			C Intro (confi	m w/9)	•		
			C More info		•		
					161		
	1			1		in a second to be	

Standard Message continued...

9d Standard Message continued... Next, 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...

Click the Languages drop-down menu and select a language. Then, record each message option in the language you selected. Repeat for any additional languages. When finished, click Next.

ay Record New	Copy Delete Volume Help	
Sele	ct:	
		•
	TT2 OFF	Languages:
	TT3 Switch To	- English
	TT4 OFF 💌	
Touch Tone	TT5 OFF 💌	Any messages in
esponse messages. Choose which TT's	TT6 OFF 💌	RED have not been recorded
support alternate	TT7 OFF 💌	
create messages for	TT8 OFF 💌	
sach.	TT9 OFF 💌	

Standard Message continued... 9e

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 **Help**). 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, click the Languages drop-down menu and select a language. Then, proceed with recording each replies in the language you selected. Repeat for any additional languages. When finished, click Next.

Enter a subject, optional attachment, and type your e-mail message in the space below.	
Subject: Blue Ridge Meeting Reminder	
 (optional): Br	ows
Only email when phone number is missing	
Message Text:	
All,	_
This is a reminder shout our meeting on June 2rd 12/a will start promptly at C DM. If you are planning to	5
This is a tentinuer about our meeting or June Siu, we will start promptly at 6 PM. If you are planning to	

9f

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**.

Call Wizard: Blu	e Ridge Group	
	Specify a text message to deliver.	
	This is a reminder about the Blue Ridge Group meeting on June 3rd. contact John Doe at 555-555-6471. Thank you!	If you are planning to attend, please
	NOTE: Text messages have a maximum size of 160 characters.	* Approximately 149 Characters
Cancel	Call Options	<- <u>P</u> revious <u>N</u> ext →

9g

FreeText Message continued...

Enter your text message in the box provided. **Please Note:** Text messages have a maximum size of 160 characters. Any part of the message past the 160th character will NOT be delivered. When finished, click **Next**.

Note about Free Text[™]: The FreeText[™] feature allows you to send text messages to the people in your list at no charge via email (*carrier charges may apply to some recipients based on their data plan*). To use this feature, a valid email account must be entered in the **Configure Email** icon (located on the Admin desktop, see page 32) and a Text Number and Text Provider must be supplied on the List Editor screen (see page 56) for each person whom you wish to contact.

		Select whom to notify, and click "OK" to start. Select:		
Cancel	Help	Call Options	<- <u>P</u> revious	<u></u> K



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 message 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.

Confirm	n Start Job	×						
You are about to contact 16 people using the view: Entire List of the Blue Ridge Group.mdb list.								
(The final count may be reduced after removal of duplicates, blocked numbers etc.)								
	Do you wish to continue	?						
	<u>Y</u> es <u>N</u> o							
	🦵 Dont show this di	alog again.						

After you click Yes the Call Center will launch:

- For information on what the Call Center is and how it functions, see page 93.
- If you would like to generate a report showing your call results once your calls are finished or configure your VoiceWave system to automatically do this for you, turn to page 97.

VoiceWave Premium

VoiceWave Premium

Now that your VoiceWave system is configured to work with your phone lines and dialing rules in your area, you can begin 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, FreeText messaging, set up multi-lingual messaging and start making outbound calls using the Call Wizard.

If you do not wish to use these advanced options and prefer to use EasyCall to make your calls after 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*).

Help Files - Since this section only covers the basic call setup, some options and features are not discussed thoroughly. For more information regarding an option or feature, click **Help** on the corresponding screen.

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

In order for VoiceWave Premium to make or receive phone calls, the Call Center must be running during your preset call times (see page 94).

Additional Admin Desktop Features for VoiceWave Premium only:



Configure Flex Fields

Flex Fields give you the ability to configure parts of your message to change based on the individual data stored for each person. For instance, you could set up a Flex Field called "Location" and within that Flex Field, have three different locations. With the "Location" Flex Field as a part of your message, each person would be told the exact location they need to go to, rather than the same location being repeated for every person.

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 alternate numbers (up to two) to be attempted if the primary number goes unanswered, 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 PhoneTree icons 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

If you plan on using Flex Fields in your message, it is recommended to first configure them before setting up your VoiceWave system to make calls. This section will discuss how to edit Flex Fields by using an example Flex Field called "Office Location." This example will also be used later in the chapter to illustrate how to add and tie in the Flex Field with your message. If you are not planning on using Flex Fields with your message, proceed to page 68.

Configure Flex Fiel	lds	
🚔 🗐 🦻 Print Scan ClearAll	+ 🤌 🗙 🚱 Add Modify Delete Help	
Select a Flex Field:	This flex field is based on a set list:	
(Right click to edit)	Speak this field as:	
< Flex Date >	Text Description Maps to:	
<pre>(hex lime > [Not used] [Not used] </pre>	Format settings:	Click on an item to reorder
<u></u> K	•	•

a) From the Admin Desktop (see page 27), click on **Configure Flex Fields**. Locate the **Select a Flex Field** column. The first two Flex Fields listed here are "Flex Date" and "Flex Time." These Flex Fields are pre-configure to allow the time and/or date from your file to be announced in your message (if applicable). Skip to the third Flex Field, "[Not used]."

Print Scan	ClearAll	Add	Modify	Delete		
Select a Flex Fiel (Right click to ed	d: it)	This fle Speak	x field is t this field a	based or as:		
< Flex Date > < Flex Time >	^	Text		-		
[Not used]	Edit	С	s:			
[Not used]	Set t	o Not Use	ed			
[Not used] [Not used] [Not used] [Not used]	Ĩ		Edit. Office	 Location	V	×

b) Right click on "[Not used]" and select **Edit**. Enter a name for the Flex Field in the Edit screen that appears and then click the **green check mark**.

VoiceWave Premium: Configuring a Flex Field, continued

Configure Flex Fie	lds	×
Print Scan ClearAll	Add Modify Delete Help	
Select a Flex Field: (Bight click to edit)	This flex field is based on a set list:	
< Flex Date >	Text sto:	
<pre>< Hex I me > Office Location [Not used] [Not used]</pre>	Format set Flex item description: South Office Maps to this value from source data: SO Ut Clin Office UK Cancel	ck 1 an m to order
	4	

c) Once you have entered a name for your Flex Field, you will need to add entries to it. Using our "Office Location" example, we have four locations that will be added: South Office, North Office, East Office and West Office. Each of these locations will be given a name and a value that identifies it when a file is imported. For instance, the above example shows "South Office" in the Flex item description box and "SO" in the Maps to this value from source data box. The Flex item description will represent how the location appears on the call list and the Maps to this value from source data is the data your VoiceWave system is looking for when the file is imported. 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 this value from source data**. Repeat for each item.

🗟 Configure Flex Fie	lds			
🖆 📄 🥠 Print Scan ClearAll	+	6 Help		
Select a Flex Field: (Right click to edit)	This flex field is based on a Speak this field as:	a set list: 🧿 Yes 🔿	No	
< Flex Date >	Text 👻	Description	Maps to:	
< Flex Time >		South Office	SO	
Uffice Location	Format settings:	North Office	NO	
[Notused]		East Office	FO	
[Not used]		West Office	lwn	
[Not used]				Clink
[Not used]				on an
[Not used]				item to
[Not used]				reorder
[Not used]				
[Not used]				
[Not used]				
[Not used]				
[Not used]				
[Not used]				
[[Not used]				
		•		۲

In this example, we see how each entry appears after being added to the Office Location Flex Field. For more information on how to set up Flex Fields, click the **Help** button while on this screen.

Continue to page 68 when you are ready to set up your VoiceWave system to make calls.

Setting Up a Message Job:



From the Desktop View, click the **PhoneTree** tab, then click on a **PhoneTree** icon. The remaining PhoneTree icons can be used for additional call lists (up to 256 icons are available by using the PhoneTree Administrator, see page 34).





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 comma-separated values (CSV) formatted file. Click Import at the top of the screen and then choose CSV (if your file requires a different translator other than CSV, please choose that instead).

Open Custom F	ile for import					? 🗙		
Look in: My Recent Documents Desktop My Documents My Computer Wy Computer	Desktop My Documents My Computer My Network My Network BlueRidge.CSV	aces	T	4 E	* # •		4	Browse to the file to import. Click Open .
My Network Places	File name: Files of type:	BlueRidge.CSV All Files (*.*)			•	Open Cancel		

Import Data	
What would you like to do with the imported data?	
Overwrite Append to Create new existing file existing file file	
	() Wait for Configure
5 A window will appear asking you what	Click CONFIGURE to make change
existing file. When the next window appears, click Configure before the timer expires.	Import will continue 7 seconds automatically in
	Configure Run Nov

Select File Type: © COMMA Separated O TAB Separated	Skip 0	➡ Header Lines	Fixed Fields:
Select how Name is imported C Last, First C First Last ⓒ Full Name	C AC+ Phon	none # imported e	Language
Last/Full Name: First Name: Deborah Turner 💌	Area Code:	Phone: (555) 555-5674	debturner@phonetree
Select Flex Fields: Flex Date Flex Time	Not used	Not used	Not used
not used 💌 not used 💌	not used	 not used 	✓ not used
Not used Not used	Cellular	Not used	Not used
notused V notused V	not used	▼ not used	▼ not used ▼

The CSV translator appears. Using the drop-down menus for Last Name, First Name, Phone, Email Address (if available) and Text Number (if available), select the corresponding data. If your file contains email addresses, multilingual 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
Þ	1		Adams, Meghan	(336) 555-9475		Not Calk
	2		Anderson, Rebecca	(336) 555-9949		Not Calk
	3		Forester, Lauren	(336) 555-8938		Not Calk
	4		Gonzales, Jessie	(336) 555-7911		Not Calk
	5		Horton, Maria	(336) 555-5579		Not Calk
	6		Morton, Carrie	(336) 555-4741		Not Calk
	7		Mory, Julia	(336) 555-3354		Not Calk
	8		Motsinger, Jenna	(336) 555-4354		Not Calk
	9		Nostitz, Carol	(336) 555-2112		Not Calk
	10		Pirkle, Christina	(336) 555-1410		Not Calk
	11		Rabil, Emily	(336) 555-6392		Not Calk
	12		Rodgers, Sarah	(336) 555-9513		Not Calk
	13		Scott, Virginia	(336) 555-3461		Not Calk
_						

E-mail	Text Number	Text Provider
gatorbreath@hottm;	555-555-9475	Verizon
batman2@AOHL.co	555-555-1212	Sprint PCS
ForesTrees@hottm:	555-555-8938	Sprint PCS
Kicker@sokker.com	555-555-9832	T-Mobile

After your data finishes importing, you should see your call list appear as shown here. Make sure all intended fields were imported correctly. **Note:** Certain fields are not available in the **Entire List** view. To create a custom view to add or remove fields, see page 113.

To add a person to the list after the file has been imported, click **Add** from the top toolbar. To remove a person, click on the person's name and then click **Remove**.

If you imported text numbers in step 6 and intend to use the FreeText feature (see pages 72 & 80), select the corresponding carrier for each number in the **Text Provider** column. If you don't know the carrier for each number, speak with the person who the number belongs to, or use the **VoiceWave Online Integration** feature to send true SMS text messages (see page 89). **Note:** If a certain carrier isn't listed, please contact PhoneTree Customer Support.

8

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

3
Options

Allow calls on:	l In Sun	Set Time	e	Ved Ved	🔽 Thu	I ₽ Fri	✓ Sat
Don't call before:	08:30 AM	==		08:30 AM	08:30 AM	08:30 AM	08:30 AM
Don't call after:	08:30 PM	100.001 M	100.50 PM	08:30 PM	08:30 PM	08:30 PM	08:30 PM
Use Night Message after	05:30 PM	05:30 PM	05:30 PM	05:30 PM	05:30 PM	05:30 PM	05:30 PM
Call job stops whe	en:	∎ T	elay start of c	all job until:		Temporarily p	ause calls:
Call iob is done							
Call job is done							

8a

The **Time/Days** tab allows you to specify which days of the week and what time during those days you want to make calls.

Disable 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 every day of the week, click on each of the time fields under **Sun**. Use the arrows to adjust the hours and minutes for each time field. To set individual times for each day, enable **Allow different times for each day** and set each "before" and "after" time as desired.

imes/ Days Call Settings Transfer Adv Option Call connection options: Max number of rings before moving on to next call: Max number of call attempts to unanswered numbers: Hang up if an Ans Machine message is longer than (sec) [25]	s Adv Dialing Remote Copy Central Database Job priority: Choose priority: Mid ▼ Within call options: ✓ Allow star (") key to repeat message ✓ Enable detection of early hang-ups active for 10 seconds of message. ✓ Bypass ans machines on first call attempt
Wait this long after message for touch tone reply (sec):	Count "9" replies and stop calls:
Use alternate phone numbers Select Flex Field:	Call this alternate number when:
2nd Phone #: 0FF	Never call this number
3rd Phone #: 0FF	Never call this number

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. Disable if this is not desired.

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

Enable **Use alternate phone numbers** if some or all the people on your call list have more than one phone number. By using this feature, your VoiceWave system will attempt the alternate numbers if the primary number is unanswered. *For more information or how to set up the alternate phone number feature, please click* **Help**.

Call Options Times/ Days Call Settings Tre Oon't call duplicates with same: Phone # Call all duplicates Call all duplicates Don't call numbers in blocked number list	nsfer Adv Options Adv Dialing Remote Copy Cent Export data: Create export file for use by another application Call logging: Log ALL Calls Deliver message to answering machines: Adways	tral Database
<u>OK</u> <u>C</u> ancel	Defaults	Help



Click on the Adv Options tab.

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



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 FreeText messages, 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 four types of messages you can configure in the Call Wizard: Call, Text, E-mail, and Multi-Lingual. 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 four at once, if you choose. **Note:** The Multi-Lingual message requires the Call message to be configured at the same time in order for it to properly work; Call, Text and E-mail alone do not.

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

		7
	The Call Wizard will guide you through the advanced messaging options. Image: Make a call Image: Make a call	
	Multilingual: Check if you wish to create multi-lingual messages	
<u>C</u> ancel <u>H</u> elp	Call Options	us <u>N</u> ext ->



To send a Call Message

Upon opening the Call Wizard, enable Make a call. Then, click Next.

To send a FreeText[™] Message

Upon opening the Call Wizard, enable Send a FreeText[™] Message. Then, click Next.

To send an E-mail Message

Upon opening the Call Wizard, enable Send an e-mail message. Then, click Next.

To send a Multi-Lingual Message

Upon opening the Call Wizard, enable **Check if you wish to create multi-lingual messages**, then click **Next**.

For instructions on how to enable and use the Social Media Sites feature, see page 83.
	Select the	message(s) you v	vish 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 #)	
		🔽 TT Respons	se (Message change on TT receipt)	

9b

Standard Message continued...

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

▶ Play	.∲ Edit	Ma New	Сору	Delete V	olume	🕜 Help				
		Sele Crea Sele	act each trois abo ate a me act: C I C I C I C I	message type b we to record and ssage of each ty Greeting Standard messag Night Ans. machine Intro (confirm w/ More info	elow anc I play, cri pe for ea ge	l a correspondi sate a new mes ich available la o.wav	ng messagge, or de isage, or de inguage at t	e to play. U lete selec he right.	lse the ted messages, English	
_	. 1				II Ontiona				(Provinue	Mouts

9c

Standard Message continued...

The message options chosen on the previous screen will determine which drop-down menus (i.e., Night, More Info, etc.) appear here. First, select **Standard message**. Then, click **New** from the top toolbar. On the screen that appears, select which type of message to use:

Single-part (linear) message (.wav) - Single recording, no option for Flex Fields.

Individually constructed message (.vft) - Multiple recordings using Flex Fields.

Next, enter a title for the message and click OK. Repeat for each message option.

VoiceWave Premium: Setting Up a Message Job, continued

▶ Play	Record	Ma New	Copy	Delete Vo	j lume	🕜 Help				
		Any Sela Crea	message ect each trois abo ate a me:	es in RED have n message type be ve to record and ssage of each typ	ot been low and play, cre- e for eac	recorded! a corresponding me ate a new message ch available languag	ssage to pl , or delete s ge at the rig	ay. Use th elected n ht.	ne nessages, <mark>- Engl</mark> i	ish 💌
"		Sele	ect: C (Greeting	Hello	.wav	•			
			01	vight			•			
			0.4	Ans. machine			•			
			0.1	ntro (confirm w/9			•			
			0.1	dore info			-			

9d 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 using the Constructed Message Editor.

Multi-Lingual Message continued...

Click the drop-down menu in the top right and select a language. Then, record each message option in the language you selected. 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 options, please proceed with these instructions. If you chose Single Part (linear), please see page 79.

🔊 Co	onstructed me	essage edit	tor				×
Ad	X 🥖 New Snippet	Play	Volume Help				
Cor	Current Date	using Adi	d, Delete and Edit			English	1
#	First Name Full Name		Script				_
	Flex Date Flex Time						
•						<u> </u>	
Creat	e a sample persoi	n to test your	message				
Nam	e	Flex Date	Flex Time				
an	d this is the resulti	ng message:					
							Ī
						~	
		ancel	TTS Settings	Flex Fie	ld Recordings	Play Message	

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 (Single Part (linear)). This allows you to use Flex Fields and other information to create a unique and customized message for each person.

Edit item:

Record Play

Snippet

Volume

Me

Voice

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

To help you understand how a constructed message works, the following message will be used as our example: "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."

Please note that "the north office" part of the message is a Flex Field and it will change based on the location that each person on the call list is assigned to. The rest of the message will stay the same.

Current sample: This message is to remind <u>0</u>K

0

Help

Г

English

The first snippet represents what needs to be said up until the Flex Field part of the message.

For this example, the first snippet will say "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.

VoiceWave Premium: Creating a Constructed Message

Constructed	nessage euro					
New Snippet	Play	Volume Help				
Current Date First Name Full Name	using Add,	Delete and Edit Script	remind		English	
Flex Date Flex Time Office Locatio	n					
						_
Image: Image	ion to test your m	essage Flex Time	Office Location		•	
 Interview of the second second	ion to test your m	essage Flex Time	Office Location Other	_		4
Ireate a sample per Vame and this is the ress This message is to r	son to test your m Flex Date Iting message: emind	Iessage Flex Time	Office Location		•	4

Next, click **Add** and insert a Flex Field that you have already set up. For our example, this is where we will insert the "Office Location" Flex Field.

nstruct a mess	age here using Ad	ld, Delete and I	Edit				English	
Item		Script						
-Unrecord	ed Snippet	This messag	ge is to remin	nd				
Uffice Lo	ication]	>>> please	select a sam	iple				
-Unrecord	ed snippet	about our m	ieeting on Ju	ine ord. Please make	sure you can	attend, we w	ill start promptly at	(6)
								•
ate a sample i	person to test your	message	/ Time	Office Location				•
ate a sample me	person to test your Flex Date	message Flex	< Time	Office Locatio	n	_		•
ate a sample i me	person to test your Flex Date	message Flex	Time	Office Locatio North Office	n		_	•
ate a sample me	person to test your Flex Date	message Flex	< Time	Office Locatio North Office	n			Þ
ate a sample me Ind this is the	person to test your Flex Date resulting message:	message Flex	Time	Office Locatio North Office	n	will start prop	untilu at Form	F

After adding a Flex Field to the message, add another "New Snippet" to complete the message (additional snippets and Flex Fields can be added for further message content, if desired). 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 text and click **OK** when finished. As 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**....

VoiceWave Premium: Creating a Constructed Message, continued

Flex Field Record	tings 	×
Caution: Settings are c	ommon to all PhoneTrees using: Glo	bal Set
Flex Fields: Office Location	Field Values: • South Office • East Office • West Office	Show multiple-languages

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 entries: South Office, North Office, East Office and West Office.

Once you have selected which Flex Field entry you want to edit, click on the **Scripts** box. The Edit screen will appear. Enter the text the Flex Field should insert into 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 where the Flex Field is inserted. The other Flex Field entries will be scripted the same way so when another person on the call list has a location other than the North office, the Flex Field message changes seamlessly.

Flex Field Record	dings	\mathbf{X}
Record Play Vo		alSet
Flex Fields: Office Location	Field Values: - South Office - North Office - E ast Office - West Office	Scripts: the north office
<u>o</u> k		

Once all entries have been scripted, they will need to be recorded. To record an entry, click on the entry to select it 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.

VoiceWave Premium: Creating a Constructed Message, continued

L Construct	ed message edi	tor			2
+ X Add Delete	🍠 🕨 Edit Play	Volume Help			
ionstruct a me	ssage here using Ad	d, Delete and Edit		English	1
# Item		Script			1
-Unreco	rded Snippet	This message is to rer	mind		
2 [Office	_ocation]	the north office			
3 -Unreco	rded Snippet	about our meeting on	June 3r	d. Please make sure you can attend, we will start promptly at 6	-
					-
				TTS Settings	
reate a samni	e nerson to test your	messare		Allow independent voice selection for each message item	
Jame	Flex Date	Elex Time		Veice is set to Kate only. See Advanced	
				Voice is set to reale only. See Advanced	L
				Voice: Kate	L
and this is th	e resulting message:			,	L
his message	is to remind the north	office about our meeting	a on Jur	For times and dates use: Text To Speech 🔻	L.
promptly at 6p	n. Thank you.	onnoo about our mooring	gonroa		L
				For [list type] flex fields use: User Recordings	L
				For shippets use:	L
	Y- 12			Hear Recordings	L
<u>0</u> K	<u>C</u> ancel	TTS Settings	Flex F	Text To Speech	L
		(F
				TTS is present Engine: VT TTS	
				OK Cancel Advanced Help	
				The Tanan Mayaneed Tiob	

This completes our example message. At this point, both snippets and all of the Flex Field entries have been recorded.

If you would like to your message announced by the Text-to-Speech software, 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, you can use these same instructions to create those messages as well.

VoiceWave Premium: Setting Up a Message Job, continued

Select: TITI Insert Langua TT2 DFF TT3 Switch To TT4 DFF Touch Tone TT5 DFF T5 DFF T6 DFF T6 DFF T6 DFF T75	
Touch Tone TT5 OFF CF C	
TT2 DFF Langua TT3 Switch To - Engli TT4 DFF - Touch Tone TT5 DFF response messages. TT6 OFF Choose which TT's TT6 OFF	
TIT3 Switch To TT4 OFF Touch Tone TT5 OFF response messages. Choose which TT's TT6 OFF Choose which TT's TT6 OFF Choose which TT's CFF Choose which TT's CFF Choose which TT's CFF Choose which TT's CFF	ages:
TT4 OFF Touch Tone TT5 OFF Any me response messages. Choose which TT's TT6 OFF been re	sh
Touch Tone TT5 OFF ▼ Any me response messages. TT6 OFF ▼ PED h Choose which TT's TT6 OFF ▼ been re	
response messages. TT6 OFF Choose which TT's DFF been re	essages in
	ave not
support alternate TT7 OFF	
create messages for TT8 OFF	
TT9 OFF 💌	

9e

Standard Message continued...

If you chose TT Response as a message option, this screen will appear. The touch tone reply numbers you choose here should coincide with the numbers mentioned 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, click the Languages drop-down menu and select a language. Then, proceed with recording the touch-tone replies in the language you selected. When finished, click Next.

Call Wizard: Blue	Ridge Grou	P		
	Enter a subject: Attachment foptionall: Use con Message Te All,	ct, optional attachment, and type your Blue Ridge Meeting Reminder when phone number is missing structed email message: xt:	e-mail message in the space	e below. Browse
Cancel He	This is a ren attend, plea	inder about our meeting on June 3rd V se contact John Doe at 555-555-6471 o Call Options	√e will start promptly at 6 PM or jdoe@bluridgrp.com.	1. If you are planning to

E-mail Message continued...

9f E-mail Message continued... Enter a subject and message for your e-mail here. If you wish to send an attachment, click **Browse** to locate and include it with the e-mail. If you would like to only send an email when a phone number is missing, enable that option here.

If you would like to use a constructed message instead, enable that option and click the drop-down menu to select your desired message. If no messages appear in the dropdown menu, you will need to create a Constructed Message before you can use this option (see page 75). When finished, click Next.

Call Wizard: Blue	e Ridge Group	
	Specify a text message to deliver. Use constructed text message: This is a reminder about the Blue Ridge Group meeting on June 3rd. contact John Doe at 555-555-6471. Thank you!	If you are planning to attend, please
	NOTE: Text messages have a maximum size of 160 characters.	Approximately 149 Characters
Cancel	Call Options	<- <u>P</u> revious <u>N</u> ext ->

9g FreeText Message continued...

Enter your text message in the box provided. If you would like to use a constructed message instead, enable that option and click the drop-down menu to select your desired message. If no messages appear in the drop-down menu, you will need to create a Constructed Messages before you can use this option (see page 75). When finished, click **Next**. **Please Note**: <u>Text messages have a maximum size of 160 characters</u>. Any part of the message past the 160th character will NOT be delivered.

Note about Free Text[™]: The FreeText[™] feature allows you to send text messages to the people in your list at no charge via email (*carrier charges may apply to some recipients based on their data plan*). To use this feature, a valid email account must be entered in the **Configure Email** icon (located on the Admin desktop, see page 32) and a Text Number and Text Provider must be supplied on the List Editor screen (see page 70) for each person whom you wish to contact.

Call Wizard: Blu	e Ridge Group	Select whom to notify, an Select: C Notify C Resume C Save cha	d click "DK" to start. Entire List Entre List Tagged Inges and exit		
Cancel	Help	<u>C</u> all Options		<- <u>P</u> revious	<u>D</u> K



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 message job.

VoiceWave Premium: Setting Up a Message Job, continued



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 the Call Center will launch:

- For information on what the Call Center is and how it functions, see page 93.
- If you would like to generate a report showing your call results once your calls are finished or configure your VoiceWave system to automatically do this for you, turn to page 97.

Notes

Social Media Integration

(VoiceWave Plus & VoiceWave Premium only)

Social Media Integration

With the Social Media Integration feature, you can quickly post a FreeText message on your Facebook, Twitter and/or LinkedIn accounts using the VoiceWave Plus or VoiceWave Premium software.

Note: To use this feature, you will need to be running version 6.16 or later of the VoiceWave Plus or VoiceWave Premium software with the Social Media Integration feature enabled, and have an account with at least one of the supported social media sites (Facebook, Twitter and LinkedIn). To check if your version is compatible, click **Help ►** About from any desktop view. If you have an earlier version, contact PhoneTree sales at 800.951.8733 to purchase an upgrade.

Help Files - Since this section only covers how to post a FreeText message on social media websites, some options and features are not discussed thoroughly. For more information regarding an option or feature, click **Help** on the corresponding screen.

Posting messages on Facebook, Twitter and/or LinkedIn:



1. Before you begin, make sure the Social Media feature is enabled on your system. From any desktop view, click Help ► Enable Features.

Enable Features:		×
Enable a Feature: To enable a feature, enter the feature code then click the [Enable] button. Be sure to include the dash in the feature code (ie: "7E8-063")	Dial-In Info Lines: Text-To-Speech: Anonymous Tip Line: Network Operation: Web Server Operation:	Enabled Enabled Disabled Enabled Disabled
Feature code:	Social Media Integration: VoiceWave Online Integration: To purchase additional features, ca	Disabled Disabled Il PhoneTree at
	800-951-8733	

 If Social Media Integration is Disabled, enter the Feature code that was included with your initial shipment, and then click Enable. If you can't locate your code, contact PhoneTree Customer Support at 800.555.0559. Otherwise, click OK to exit this screen and proceed to step 3.

D Jew) Open	Print A	+ X Add Remove F	🔍 📕 ind List	Filter Mailbox C	Options ASC	Ž↓ 59 DESC EasyCa	🄰 🔜 Il Wizard Online	2 Exit		
					Blue	Ridge Gro	oup				
ID	Tag Uni	que ID	Name	Phone	Translated	Call Status	Replies	Last Call Time	Last Call Date	E-mail	Text Nu
10			Alan Young	(555) 555-7810		Not Called Yet			Not Called	ayoung@phonetree	(555) 55
15			Allen West	(555)-555-4560		Not Called Yet	1		Not Called		(555) 55
18			Bob Kramer	(555) 555-0101	1	Not Called Yet			Not Called	3	(555) 5
14			Bruce Springs	(555) 555-3201	1	Not Called Yet	1		Not Called	bsprings@phonetre	
8			Claire Peterson	(555) 555-4532	-	Not Called Yet	1		Not Called	cpeterson@phoneti	(555) 5
1			Deborah Turner	(555) 555-5674	1	Not Called Yet			Not Called	debturner@phonetr	(555) 5
16			Doug Goode	(555) 555-8001		Not Called Yet	1		Not Called	1	(555) 5
5			Edward Booth	(555) 555-7840	1	Not Called Yet			Not Called	ebooth@phonetree.	(555) 5
7			Evelyn Jones	(555) 555-9765		Not Called Yet			Not Called	ejones@@phonetre	(555) 5
21			James McDowell	(555) 555-0220		Not Called Yet			Not Called		(555) 5
13			Janet Williams	(555) 555-3256	1	Not Called Yet			Not Called	jwilliams@phonetre	
22			John Wilson	(555) 555-0000		Not Called Yet	1		Not Called		
19			Kate Smith	(555) 555-7403		Not Called Yet			Not Called	8	(555) 5
17			Kelly Motsinger	(555) 555-8521	1	Not Called Yet			Not Called		(555) 5
12			Margaret Wittinghan	(555) 555-2727		Not Called Yet	1		Not Called	omargaret@phoneti	(555) 5
2			Micheal Scott	(555) 555-9211	1	Not Called Yet			Not Called		(555) 5
4			Mindy Meeks	(555) 555-7657	-	Not Called Yet			Not Called	mmeeks@phonetre	
20			Neil Young	(555) 555-9872		Not Called Yet			Not Called		
11			Patricia Evans	(555) 555-8275		Not Called Yet			Not Called	pevans@phonetree	(555) 5
3			Paula Edwards	(555) 555-1800	1	Not Called Yet			Not Called	pedwards@phonet	(555) 5
6			Timothy Moore	(555) 555-5550	5	Not Called Yet			Not Called	tmoore@phonetree.	(555) 5
0			Vincent Boyle	(555) 555-6937	2	Not Called Yet			Not Called	vbovle@phonetree	(555) 5

3. Once your system has been enabled, open the desired PhoneTree icon containing the list you wish to use to send messages with and click on the **Wizard** icon from the top toolbar.

Call Wizard: Blue Ridge Group	The Call Wizard will guide you through the advanced messaging options.	
	 ✓ Make a call ✓ Send a FreeText Message ✓ Also Post the Text Message to Social Media Sites ✓ Send an e-mail message 	
	Multilinguat — Check if you wish to create multi-lingual messages	
<u>Cancel</u> <u>H</u> elp	Call Options	<u>N</u> ext ->

4. On the first Wizard screen, check **Send a FreeText Message** and then check **Also Post the Text Message to Social Media Sites**. If you wish to also send messages via phone or email, enable those options at this time (for information on how to prepare and send phone and/or email messages for VoiceWave Plus, see page 58 and for VoiceWave Plus, see page 72). When finished, click **Next**.

Social Media Integration, continued

Call Wizard: Blue R	idge Group		
	Specify a text message to deliver. Use constructed text message: Blue Ridge Group will be hosting our annu D100 or email us at info@blrggrup.	al Meet n' Greet on 5/5/2012! Contact our office	at 555-555- 🔺
	NOTE: Text messages have a maximum size of 160 characters.	Approximately 135 Characters	-
Cancel	Help	<- <u>P</u> revio	us <u>N</u> ext ->

5. On the text message screen, enter a message you wish to send as a text and post to your social media accounts without exceeding 140 characters, and then click Next. If you only wish to post your message on a social media site, you can later elect not to send text messages.

Call Wizard: E	Ridge Group	Select whom to notify, ar Select: I Notify I Resume I Save cha	nd click "OK" to start. Entire List anges and exit	T		
Cancel	<u>H</u> elp	Call Options]		<- <u>P</u> revious	<u> </u>

6. After reaching the end of the wizard, select whom you wish to notify from the drop-down menu (Entire List is typical), and then click OK.

Social Media Integration, continued

Sales - 800.951.8733 Make Payment Support S	Sales - Live Chat Channel Partners VoiceWave Online login
PhoneTree	About Us Products Industries Contact Us
Post Your Message	
Give Facebook Access	Posting your message to social media sites is as easy as 1-2-3:
Give Twitter Access	Enter your message text in the box below exactly as you want it posted.
Give LinkedIn Access	Click the checkboxes for each of the social media sites you want to post to and click the Post Message button.
	Enter your message
	Blue Ridge Group will be hosting our annual Meet n' Greet on 5/5/2012! Contact our office at 555-555-0100 or email us at info@blrggrup.

7. Your default web browser will launch and take you to this page. If this is your first time seeing this page, you will need to register or login to each social media site you wish to use by clicking on the corresponding link on the left side of the page.

en. Professional. Trusted."		About Us Products	Industries Contact Us
Post Your Message			
Facebook Information	Posting your message to so	cial media sites is as easy as 1-2-3:	
Name: <u>Tom Jerry</u>	Check the area to the sites you want to pos	e left and make sure you are logged into al to.	l of the social media
Ω	Click the checkboxes the Post Message bu	ext in the box below exactly as you want it for each of the social media sites you wan tton.	posted. t to post to and click
Facebook Logout	Enter your message		
Twitter Information	Blue Ridge Group will be Contact our office at 55	hosting our annual Meet n' Greet 5-555-0100 or email us at info@blr	on 5/5/2012! :ggrup.
Name: Phonetree			5 chars left
Location: Description:	Post to Facebook	Our Well	
	Page: Privacy:	Public	•
	Post to Twitter		
<u>, milo cogou</u>	Post to LinkedIn		
LinkedIn Information	Í	CLEAR MESSAGE	POST MESSAGE
		Message has been posted on Facebool	k, Twitter, LinkedIn.

8. After logging in to each account, you will have the option of checking/unchecking which accounts you want to post your message to. When are you ready to post, click **Post Message**. A confirmation will appear beneath the buttons once the message has posted to each account.



9. After posting your messages, close or minimize your web browser and the VoiceWave software should be displaying this screen. If you wish to send messages using the VoiceWave software for the types you selected on step 4, click **Yes**. Otherwise, click **No** if you only wanted to post a message on your social media accounts.

VoiceWave Online Integration

(VoiceWave Plus & VoiceWave Premium only)

VoiceWave Online Integration

With the VoiceWave Online Integration feature, you can keep your VoiceWave Plus or VoiceWave Premium and VoiceWave Online lists and groups in sync so you can send messages to your contacts anytime, anywhere. In addition, this feature gives you the option to send SMS text messages to your contacts using VoiceWave Online in the event you don't know the text provider information for each text number (as required by the FreeText feature).

Note: To use this feature, you will need to be running version 6.16 or later of the VoiceWave Plus or VoiceWave Premium software with the VoiceWave Online Integration feature enabled, and have an active VoiceWave Online account. To check if your version is compatible, click **Help ►** About from any desktop view. If you have an earlier version, contact PhoneTree sales at 800.951.8733 to purchase an upgrade.

Help Files - Since this section only covers how to sync your lists and groups between PhoneTree products, and how to send SMS text messages with VoiceWave Online, some options and features are not discussed thoroughly. For more information regarding an option or feature, click **Help** on the corresponding screen, or refer to any available help-related content found on the VoiceWave Online website (www.voicewaveonline.com).

Syncing contacts between VoiceWave desktop & online products:



1. Before you begin, make sure the VoiceWave Online feature is enabled on your system. From any desktop view, click Help ► Enable Features.

Enable Features:		×
Enable a Feature: To enable a feature, enter the feature code then click the [Enable] button. Be sure to include the dash in the	Dial-In Info Lines: Text-To-Speech: Anonymous Tip Line: Network Operation:	Enabled Enabled Disabled Enabled
feature code: Feature code: Image: state st	Web Server Operation: Social Media Integration: VoiceWave Online Integration: To purchase additional features, ca 800-951-8733	Disabled Disabled Disabled Il PhoneTree at

2. If **VoiceWave Online Integration** is **Disabled**, enter the **Feature code** that was included with your initial shipment, and then click **Enable**. If you can't locate your code, contact PhoneTree Customer Support at 800.555.0559. Otherwise, click **OK** to exit this screen and proceed to step 3.

VoiceWave Online Integration, continued

	hone	Tree Pho	oneTree	1													•	۲
File	Edit	Tools	View	Search	Setup Call	Import Help												
	~	~	Æ	1	× 1			1 25	(2)	AL	2.1	K.	24		1.0			
		-			· · · · · · · · · · · · · · · · · · ·		Y		0	Zŧ	Ă.↓	~~~~	N.C. and	Collins.	2			
IN	ew	Open	Print	Add	i Kemove	Find List	Filter	Ivialibox	Options	ASC	DESC	EasyCall	wizard	Unline	EXIL			_
								Blu	e Ridg	je Gro	oup							
	ID	Tag Uni	ique ID	P.	lame	Phone	Tran	slated	Call Sta	itus	Replies		Last Call	Time	Last Call Date	E-mail	Text Nui	*
	10			A	Alan Young	(555) 555-7810)		Not Call	ed Yet					Not Called	ayoung@phonetree	(555) 55	
	15			A	Allen West	(555)-555-456)		Not Call	ed Yet					Not Called		(555) 55	
	18			E	Bob Kramer	(555) 555-0101	1		Not Call	ed Yet					Not Called	8	(555) 55	
	14			E	Bruce Springs	(555) 555-3201			Not Call	ed Yet					Not Called	bsprings@phonetre		
	8			0	Claire Peterson	(555) 555-4532	2		Not Call	ed Yet		6			Not Called	cpeterson@phonet	(555) 55	
	1			0	eborah Turner	(555) 555-5674	£		Not Call	ed Yet					Not Called	debturner@phonetr	(555) 55	
	16			0	oug Goode	(555) 555-8001	1		Not Call	ed Yet					Not Called		(555) 55	
	5			E	dward Booth	(555) 555-7840)		Not Call	ed Yet					Not Called	ebooth@phonetree.	(555) 55	
	7			E	velyn Jones	(555) 555-9765	5		Not Call	ed Yet					Not Called	ejones@@phonetre	(555) 55	
	21			J	ames McDowell	(555) 555-0220)		Not Call	ed Yet					Not Called		(555) 55	
	13			J	anet Williams	(555) 555-3256	5		Not Call	ed Yet					Not Called	jwilliams@phonetre		
	22			J	ohn Wilson	(555) 555-0000)		Not Call	ed Yet					Not Called			
	19			H	(ate Smith	(555) 555-7403	3		Not Call	ed Yet		8			Not Called		(555) 55	
	17			H	Celly Motsinger	(555) 555-8521			Not Call	ed Yet					Not Called		(555) 55	
	12			h	largaret Wittinghar	(555) 555-2727	1		Not Call	ed Yet					Not Called	omargaret@phonet	(555) 55	
	2			h	licheal Scott	(555) 555-9211			Not Call	ed Yet					Not Called		(555) 55	
	4			h	lindy Meeks	(555) 555-7657	()		Not Call	ed Yet					Not Called	mmeeks@phonetre		
	20			h	leil Young	(555) 555-9872	2		Not Call	ed Yet					Not Called			
	11			F	Patricia Evans	(555) 555-8275	5		Not Call	ed Yet					Not Called	pevans@phonetree	(555) 55	
	3			F	aula Edwards	(555) 555-1800)		Not Call	ed Yet					Not Called	pedwards@phonet	(555) 55	
	6			T	imothy Moore	(555) 555-5550)		Not Call	ed Yet					Not Called	tmoore@phonetree.	(555) 55	
	9			١	/incent Boyle	(555) 555-6937	1		Not Call	ed Yet					Not Called	vboyle@phonetree.	(555) 55	
						1												+
1					•	1											•	
22/	22		Entire L	_ist	Sort	Name	NS	Cal	ls Stopped	#00	1 11:28 A	M						1.

3. Once your system has been enabled, open the desired PhoneTree icon containing the list you wish to sync with your VoiceWave Online account and click on the **Online** icon from the top toolbar.

√oiceWave Online account info	rmation	
Login Email 🛛 🗍		
Login Password		
	Remember Me	off line
Choose a transfer option		
C. Copulties current view to	mu.VoiceWave Online account	
C Create a NEV (area		
Create a NEW grou	н I	
C REPLACE an existin	ng group	•
C Division of the	V-1	
 Retrieve a group from my 	Voicewave Unline account	
Select an ONLINE group	p to retrieve:	•
Create a NEW group I	here named:	

4. The VoiceWave Online screen will appear. Enter your VoiceWave Online login information in the boxes provided, and then check **Remember Me**. The VoiceWave software will now attempt to connect to your VoiceWave Online account.

VoiceWave Online Integration, continued

		What is	s VoiceWave Onli
iceWave Online accoun	t information		
Login Email	jdoe@phon	etree.com	
Login Password	*******		
	, I⊽ Rememb	er Me	on line
oose a transfer option			
Copy the current vie	w to my VoiceW	/ave Online account	
Create a NEW	group	Blue Ridge Group	
C REPLACE an e	existing group		Y
C Retrieve a group fro	m myVoiceWav	ve Online account	
 Retrieve a group fro Select an ONLINE 	m my VoiceWav group to retrieve	ve Online account e:	•

5. Once logged in, the **off line** status will switch to **on line**. This confirms you are now connected to your VoiceWave Online account. Next, you will need to choose a transfer option.

If you wish to upload the list that is currently stored in your VoiceWave Plus or VoiceWave Premium software to your VoiceWave Online account:

- 1. Select Copy the current view to my VoiceWave Online account.
- 2. Choose to either Create a NEW group using this list, or REPLACE an existing group.
- 3. Click Transfer.
- 4. The "Upload Complete" screen will appear once your transfer is complete (if any contacts failed to transfer, make sure your data is properly formatted and try again). Click **Yes** if you wish to launch VoiceWave Online to send phone, email and/or SMS text messages to the contacts on your newly uploaded group, or **No** to close this screen.

		<u>What is</u>	VoiceWave Onlin
oiceWave Online accoun	t information		
Login Email	jdoe@phonet	ree.com	
Login Password	******		
	Remember	Me	on line
hoose a transfer option —			
C Copy the current vie	w to my VoiceWa	ve Online account	
C Create a NEW	group		
C REPLACE an e	xisting group		-
 Retrieve a group fro 	n myVoiceWave	Online account	
	aroup to retrieve:	Customers	•
Select an ONLINE	a		and the second s

- **6**. If you wish to retrieve a group that is currently stored in your VoiceWave Online account and download it to your VoiceWave Plus or VoiceWave Premium software:
 - 1. Select Retrieve a group from my VoiceWave Online account.
 - 2. Select a group from the Select an ONLINE group to retrieve drop-down menu.
 - 3. Enter a name for the group to be saved to in the Create a NEW group here named box.
 - 4. Click Transfer.
 - 5. The "Download Complete" screen will appear once your transfer is complete. Click Continue, and then click Cancel to exit the VoiceWave Online Integration screen. Now you can click the Wizard icon from the top toolbar to send phone, email and/or FreeText messages to the contacts on your newly downloaded list.

Call Center

Call Center

Once you have initiated your calls from either EasyCall or the Call Wizard, the Call Center will launch. 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:

in gaser thep						
PhoneTree	Tools	Tasks		nfoLine	Admin	Call Center
call center						×
Lines 1 to 4	5 to 8 9 to 12 13 to 1	16				Denne
PhoneTr Adama	ee 1	€ €	PhoneTree	e: Line 2	<u> </u>	Pause
1 336 555	-9475				-	Stop
Start Call		•	lone availabl	e		
PhoneTr	ee: Line 3	•	PhoneTre	e: Line 4	•	
						volume
Line Cardie	not Present		ine Card is no	t Present		
	IOCT IGSOIR		ne cala la ne	KT IOSOFIC		09:10 AM
PhoneTre	Information/ Status	Chalter F	. Direct	Constant	Nel Defere Nel Alter	More Info ->
1 Phone	Tree 1	Calling N	fid 1	0/16	08:30 AM 08:30 PM	

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: Controls the playback volume while listening to calls being placed (does not control the volume of the actual call to the intended person). Click the **Mute** button to silence playback.

C. Pause Button: Use to stop calling. In-progress calls are finished before returning to the PhoneTree Desktop. You can return here to finish the message job later by clicking Call Center tab.

D. Stop Calls Button: Use to stop calling immediately. In-progress calls are interrupted and you will be taken back to the PhoneTree Desktop. You can return here to finish the message job later by clicking the Call Center tab.

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

Statuses:

Every person on your list will receive a Status, regardless of the type of message being sent. Below is a listing of each Status and its corresponding definition. You can view your message job's statuses by either opening your list under the PhoneTree desktop or by reviewing your report (see page 97).

Completed Call Statuses (message delivered)

Ans by Person	Message was delivered to a person
Ans by Machine	Message was delivered to a person's voicemail/answering machine
Ans By +Machine	Message was delivered to a person's voicemail/answering machine
Ans By Pager	Message was delivered to a person's pager
Call Transferred	Person was transferred to a preset extension after pressing "0"
EMailed only	Email message was sent to a person, no call was placed

Incomplete Call Statuses (VoiceWave will re-call)

BUSY	Busy signal detected on last call attempt
Not Called Yet	Person has not been called yet
Learned Machine	A unique voicemail/answering machine greeting was analyzed and will be retried
No Answer	No answer on last call attempt
9 Not Confirmed	"9" was not pressed by person after 3 call attempts

Final Call Statuses (VoiceWave will not re-call)

Hung up early	Call was answered, but responder hung up before message finished
BUSY after Voice	Problem completing call, check for possible issue with phone number
Max No Answers	No answer and/or busy signal detected for all call attempts (up to 15)
Not Accepted	"9" was never pressed by person after 3 call attempts

Not Selected Statuses (VoiceWave will not attempt to call)

Not Selected	Person is not Tagged for calling
Removed as Dup	Person's name and/or number appears on the call list more than once
Blocked Number	Person is on the VoiceWave Blocked Numbers list

Error Call Statuses (please check the phone number)

Call Failed!	Problem completing call, check for possible issue with phone number
OGM too long	Voicemail/answering machine greeting was too long, message not delivered
Telco Msg	Problem completing call, check for possible issue with phone number
No Connect	Problem completing call, check for possible issue with phone number
Fax or Modem	Call was answered by a FAX machine or modem
Bad Name/Phone	Person's name and/or phone number is missing or incomplete

Email/Text Statuses

Sent	Message was sent to a person's email or cell phone (Note : VoiceWave does not display delivery confirmation for emails or text messages. To ensure delivery, please keep your contact information up to date.)
<no status=""></no>	Message has not been sent yet

In addition to the above statuses, a number or an asterisk may appear to the right of the Status, in the **Replies** column. This indicates a touch-tone was pressed by the person during the call:

0: Indicates call was transferred to a voice mailbox or other extension on your phone system

1 - **9**: Varies depending on the message. You may request that the person respond to a question with any touch-tone digit (i.e., dial '5' if you can come to this Thursday's meeting, dial '3' if you need transportation, etc...)

: Indicates the person dialed a '' (star) to repeat the message

Reports

Reports

You can create a report of your message job's results once it has finished contacting the people on your list. Included with your VoiceWave system are an array of reports that show various data regarding your message job's results. Also, you have the option of either creating the reports manually or configuring your VoiceWave system 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.

PhoneTree				
File Edit Tools View Search Setup	o Call Import	Help		
New Ct Open Ct Save As Ct Rename As	rl+N rl+O rl+S Z↓ DESC	List Filter		
Delete File	1.0	Exit		
Blue Ridge Group.mdb	Rid	ge Group		
		Phone	Translated	Call Status
Query Monthly Call Logs	han	(336) 555-9475	1 336 555-9475	Not Called Yet
Query Monthly Call Logs by Job	ebecca	(336) 555-9949	1 336 555-9949	Not Called Yet
View Monthly Call Logs	uren	(336) 555-8938	1 336 555-8938	Not Called Yet
Exit to Desktop View	essie	(336) 555-7911	1 336 555-7911	Not Called Yet
	ton, mana	(336) 555-5579	1 336 555-5579	Not Called Yet
6 🔲 Mor	ton, Carrie	(336) 555-4741	1 336 555-4741	Not Called Yet
7 Mor	y, Julia	(336) 555-3354	1 336 555-3354	Not Called Yet
8 🗖 Mot	singer, Jenna	(336) 555-4354	1 336 555-4354	Not Called Yet
9 🗖 Nos	titz, Carol	(336) 555-2112	1 336 555-2112	Not Called Yet
10 🗖 Pirk	le, Christina	(336) 555-1410	1 336 555-1410	Not Called Yet
11 🗖 Rab	il, Emily	(336) 555-6392	1 336 555-6392	Not Called Yet
	nare Carah	(336) 555 0513	1 336 656 0513	Not Called Vet
16 / 16 Entire List	Sort	Name INS	Call: E	lue Ridge Group 🏾 🏾

- 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.

Make Print Sel	lections		
Report format:			
Standard Report		-	Preview/
Send report to:			
Printer		-	<u>S</u> etup
<u>Print</u>	Cancel		<u>H</u> elp

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

e Export icon. Phone	Blue Ridge	Group	Phanefres: Phanefres 1 File: She higo (rep View: Enthe Lat
Harre	Cuil Status	Phone Humber	Replies LastCallDate LastCallTime
Riderma, Miles	han Nat Called Yet	634)555-9485	Not Called
Anderson, B-	shectas Not Called Yes	(834)555-994	Not Called
Forester, La	ren Nitt Called Yet	(314) 555-4934	Not Called
Gonzales, Je	zale Not Called Yet	(834) 555-19 11	Not Called
Horton, Mark	Nit Called Yet	0141555-5519	Nit Called
Morbon, Carr	e Not Called Yet	(834)555-4841	Not Called
Mory, Julio	Not Called Yet	(014) 555-0354	Not Called
Metsinger, J	stras Not Called Yet	(3)4)555-\$54	Not Called
Notifiz, Caro	Not Called Yet	(314) 555-212	Not Called
Disk Char	na Nat Called Yet	(834)555-549	Not Called
	his call in the	(314) 555-4392	Not Called
Robil, Emby	Here Cance For		Not Called
Rabi, Emby Rodgers, Sai	whit Called Yet	(334)555-95 8	
Rabi, Emby Robjers, San Sott, Utgini	nah Nat Caaled Yet a Nat Caaled Yet	(334) 555-94 8 1	Not Called
Rabil, Emby Rodgers, Sau Sotte, Utgin Sinther, Or	n Net Called Yet a Net Called Yet a Net Called Yet a Net Called Yet	(334) 555-95 % (334) 555-944 1 (334) 555-9449	Not Called Not Called
Rada, Emby Rodgens, Sa Sonte, Ungen Sanaffrer, Sa	nin Kaled Yet a Nat Caled Yet b Nat Caled Yet mba Nat Caled Yet	(34)333-45 8 (34)333-44 1 (34)333-141 (34)333-1411	Net Called Net Called Net Called

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.

Export		×
Format:		
Word for Windows document	-	
Acrobat Format (PDF) Character-separated values	^	Cancel
Comma-separated values (CSV) Crystal Reports (RPT) Crystal Reports 7.0 (RPT)	~	

AutoReports:

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

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

	1	Phon	eTre	9				
b) Then, click Setup and choose Autoreport	File N (Ma	e Edit D lew Ibox	Tool Open (Open	s View Search Print Ac S EasyCall Wizar	Setup Call Import Preferences Desktop Icon Task Icons Call Options Flex Field Recordin	gs	Filter	
						ye G rou	р	
		ID	Tag	Unique ID	Name	Phone	Translated	Call Status
		1			Adams, Meghan	(336) 555-947	5 1 336 555-9475	Not Called Yet
		2			Anderson, Rebecca	(336) 555-994	9 1 336 555-9949	Not Called Yet
		3			Forester, Lauren	(336) 555-893	8 1 336 555-8938	Not Called Yet
		4			Gonzales, Jessie	(336) 555-791	1 1 336 555-7911	Not Called Yet
		5			Horton, Maria	(336) 555-557	9 1 336 555-5579	Not Called Yet
		6			Morton, Carrie	(336) 555-474	1 1 336 555-4741	Not Called Yet
		7			Mory, Julia	(336) 555-335	4 1 336 555-3354	Not Called Yet
		8			Motsinger, Jenna	(336) 555-435	4 1 336 555-4354	Not Called Yet
		9			Nostitz, Carol	(336) 555-211	2 1 336 555-2112	Not Called Yet
		10			Pirkle, Christina	(336) 555-141	0 1 336 555-1410	Not Called Yet
		11			Rabil, Emily	(336) 555-639	2 1 336 555-6392	Not Called Yet
	•	17			Dodoare Sarah	(336) 555 051	3 1 336 555 0513	Not Called Vet
	16	/16		Entire List	Sort	Name	INS Call:	Blue Ridge Group

c) The Setup AutoReports window opens. Click Add.

	AutoReport Setup				
Setup AutoReports	General E-Mail Deta	ils Output File Details Fax Details ptions: Standard Report		ubject: eMessag Fax	×
	Output to: View: Select printer for th	Printer Printer File EMail WinFax PRD is report:			
▲	Microsoft Office D Daily report Final report	ocument Image Writer	•	Нер	•
		ancel	Help		-

d) The AutoReport Setup window opens. There are four different types of AutoReports that be generated: 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 98).

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 113).

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 message job is complete.

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

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

Notes

Tasks

Tasks: Creating a Manual Task

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.

3	Phon	eTree	e								
File	e Edit	Tool	s View Search S	etup Call Im	port	Help					
N	D lew	Dpen	Print Ac	Preferences Desktop Icon		1 List	💡 Filter				
-		0	Ke 3e	Task Icons		0					
Ма	ilbox (Option	s EasyCall Wizar	Call Options	•	Exit					
				AutoReport							
				Blue F	Ridg	e Gro	up				
	ID	Tag	Name	Phone	T	ranslated		Call Status		Replies	-
▶	1		Adams, Meghan	(336) 555-947	5			Not Called Ye	t		
	2		Anderson, Rebecca	(336) 555-994	9			Not Called Ye	t		
	3		Forester, Lauren	(336) 555-893	8			Not Called Ye	t		
	4		Gonzales, Jessie	(336) 555-791	1			Not Called Ye	t		
	5		Horton, Maria	(336) 555-557	9			Not Called Ye	t		
	6		Morton, Carrie	(336) 555-474	1			Not Called Ye	t		
	7		Mory, Julia	(336) 555-335	4			Not Called Ye	t		
	8		Motsinger, Jenna	(336) 555-435	4			Not Called Ye	t		
	9		Nostitz, Carol	(336) 555-211	2			Not Called Ye	t		
	10		Pirkle, Christina	(336) 555-141	0			Not Called Ye	t		
	11		Rabil, Emily	(336) 555-639	2			Not Called Ye	t		
	12		Rodgers, Sarah	(336) 555-951	3			Not Called Ye	t		-
4											•
16	/ 16		Blue Ridge Vie	W	Sort N	ame	INS		Calls S	Stopped	01

b) From the Setup menu, choose Task Icons ...

Tasks: Creating a Manual Task, continued

Available Tasks:	Add Delete
T New Task Icon	
Enter a name for a new task Icon: Call Blue Ridge Group	OK Cancel
File to Open:	
View: Report Template: Translator: Chain To:	Use OnDemand Service
<u>OK Modify Task</u>	Help

c) Next, click the Add button, then enter a name for your new Task Icon, and click OK.

	X
Now click the Modify Ta	sk button to modify the action of this task

d) Click OK on this screen. Now click the Modify Task button.



Tasks: Creating a Manual Task, continued

f) Click the ADD a command to script button. Choose Import , then File .	Modify Task Content: C Edit Icon Edit Task Task Content: Script: Double-Click any item in list a File to Open: View: Report Template: Translator: Chain To: QK Cancel	All Blue Ridge Group	ierent Message (Optional!) n	 File Import NOFILE (Special Case) Prompt for File
PhonoTrop				
Choose YES to	specify the file to import or I Yes	NO if the AutoTask trigger	file and the data file a	re the same.

g) Click the Yes button.



h) Specify the file your VoiceWave system 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).

ОК
Cancel

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.

IMPORT /O /D C:\Program Files\PhoneTreeMVPu\PhoneTree Call File.csv command was added to the end of your script. Use UP/DOWN arrows to move it if necessary.
OK

k) Click **OK**. Now your Import command shows up in the Task Content window of the Modify Task Icon screen.

Now click the Add command	Modify lask Content: C Edit Icon Edit Task Task Content: Task Content: ADD Script IMPORT /0 /D C:\Program	View Import Print Select Different Message (Optionali) Call File System Tools Skip Exit	Stop List View Groups EasyCall
choose Call ► View .	Double-Click any item in list a File to Open:	bove to edit, Right-Click to delete	Wizard Resume Tagged Resume (orList if new) Resume (orView if new) Resume (or Groups if new)
	Peport Template: Translator: Chain To:	None View	telp

l)



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**.

Modify Task Content: C	Call Blue Ridge Group	×
Edit Icon Edit Task	D a command to script	
File to Open:	Blue Bidge Group	1
View	Current View	1
Report Template:	None	1
Translator:		1
Chain To:	Name	
<u>O</u> K Cancel		Help

Task Icons			×
Available Tasks:			
001 Call Blue Ridge	e Group.txt	<u>}</u> dd Ca	III Blue Ridge Group
- Task Content Previe	ew:		
CALL VIEW	,		~
File to One and	Rue Ridge Group rodb		
File to Upen:	joide mage choop.mab		
View:	Current View		
Benort Template:	None		
	leev.		
I ranslator:	JLSV		
Chain To:	None	V 🗹	isible
	1odify Task		Help

 Repeat this process for any other Task Icons you would like to create, then click OK.
PhoneTree V6 Navigation Configure	Help					
PhoneTree	Tools	Tasks	InfoLine	Admin	Call Center	Voice Wave™ PREMIUM
Import File						VOLCETY ave chemium
	6.1 7	i co Diane Tana i				

The Task icons you've created will now appear on the Task desktop, and when you click an icon, the commands you selected will be execute 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?

Your VoiceWave system 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 execute automatically **only if the Call Center is running** (like all other automated features). Here's how to do this:

🐻 Configure AutoTasks	
🐻 Configure AutoTasks	
Trigger Description Ta	Task Last Run Date
*	

Delete

Print

Help

b) The **Configure AutoTasks** dialog appears. Click the **Add** button.

Modify

Add

<u>o</u>K

🔊 AutoTask Item	×
Select task to run automatically:	
001 Call Blue Ridge Group txt	Call Blue Ridge Group
Automated task description:	
Select task trigger mode: Time-Trigger C File-Trigger	
Task will run at this specific time and day(s): Click on day(s) task will run: (green = enabled) Su Mo Tu We Th Fr Sa Run task at: 10:00 AM	
<u>D</u> K <u>C</u> ancel	Help

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.

Tasks: Automating a Task, continued

AutoTask Item	×
Select task to run automatically:	
001 Call Blue Ridge Group.txt	Call Blue Ridge Group
Automated task description:	
Select task trigger mode: Time-Trigger C File-Trigger	
Task will run at this specific time and day(s): Click on day(s) task will run: (green = enabled) Su Mo Tu We Th Fr Sa Run task at: 10.00 AM	
<u>QK</u> <u>C</u> ancel	Help

d) Next, decide which type of Trigger you want to use to initiate this Task - either a Time Trigger (activates the task at the time you designate) or a File Trigger (activates 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.

AutoTask Item	X
Select task to run automatically:	
001 Cell Blue Ridge Group txt	Call Blue Ridge Group
Automated task description: Call Blue Ridge Group	
-Select task trigger mode: C Time-Trigger I File-Trigger	
Taskwill run when this file appears Browse for a Trigger File C.\Program Files\PhoneTreeMVPu\PhoneTree Call File.csv	
<u>D</u> K <u>Cancel</u>	<u>H</u> elp

e) For a File Trigger, you will specify the file name and where to find it each time it has been updated (this file will be required when the Task needs to execute). 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.

Tasks: Automating a Task, continued

	Trigger	Description	Task	Last Run Da	ate L
	C:\Program Files\Pho	Call Blue Ridge Group	001 Call Blue Ridge Gro		
*					
1					
. [1				

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.

PhoneTree					
vigation Help	1	1		1 sta	
PhoneTree	Tools	Tasks	InfoLine	Admin	Call Center
call center					×
Automation	Lines 1 to 4			1	
Description	Description Job Trigger Last Run Time Status				
✓ Daily M	✓ Daily Maintenance at 4/30/2010 1:00:00 AM			2 20 PM	Stop
√ UUI La	I Blue Hidge Group	SMIWIFS 10:00 AI	M 4/28/2010 3:3	3:30 PM -	
				3	
					j Volume
					Mute
<				+	09:50 AM
PhoneTre	a Information/ Status				More Info
# Phor	neTree	Status Pri	Placed Completed	Not Before Not Afte	er Call Days
1 Phor	neTree 1	Calling Mid	2 2/30	08:30 AM 08:30 P	M SMTWTFS
No errors					
edit call lists or cha	ange settings, click PAUSE	E to leave the CallCenter.			

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: Creating a Custom View

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:

PhoneTree V6					
Navigation Configure	Help				
PhoneTree	Tools	Tasks	InfoLine	Admir	n Call Cent
****				1111	41111
PhoneTree 1	PhoneTree 2	PhoneTree 3	PhoneTree 4	PhoneTree 5	PhoneTree 6 P

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.



Filter/Sort Menu Choose a view: Entire List New View Click add to create a custom view Add Del	Filter/Sott Appearance Check filter category(s) Check filter category(s) Groups Replies Flex Date Flex Date Flex Date Flex Time Office Location Not used Not used Not used Not used Not used Not used Not used Not used	then click criteria to view: S Not Confirmed Ans by +Machine Ans by Pager Ans by Pager Ans by Person Bad Name/Phone Blocked Number BUSY BUSY After Voice Call Failed Call Transferred EMailed only Fax or Modem Hung up early Learned Machine Max No Answers No Answer Select all Select none	Sort order: Name 21 None 21 None 21 Clear
<u>K</u>			<u>H</u> elp

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**.

Filter/Sort Menu		
Choose a view: Entire List New View Click add to create a custom view Add Del	Filter/Sort Appearance	Display options: Highlight removed persons in red Font size: Small Font
		<u></u>

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 VoiceWave 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 to call remotely. If you choose to enable this feature for all of your icons, repeat steps 2-7 for each icon.
- 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").

Options

- 3. Open the List Editor screen by clicking on the desired PhoneTree icon.
- 4. Click the **Options** icon from the top toolbar, then click on the **Remote** tab.

iimes/Days Call Settings Tra Remote access: ✓ Enable remote calling	nsfer Adv Options Adv Dialing Remot Override "Time/Days" tab I settings to allow remote call	e Copy Central Database
Specify file to use for remote acce Select file: Blue Ridge Group.r © Default to "Call List" © Default to "Call Groups"	ndb Browse	

- 5. Under Remote access, click Enable Remote Calling.
- 6. Enter a PIN code for user access to the Remote feature (required).
- Enable the Override "Time/Days" tab settings to allow remote call session to begin immediately box if you want to use Remote Operation outside the preset call window settings you entered on the Time/Days tab.
- 8. To select the Calling List file to be used when your VoiceWave system calls remotely, click Browse and select the intended file (the Lists available 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.
- 9. 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.

		TTT
Configure P	hone Lines	
Select line:	Use different settings at night	Night is from: 05:30 PM until 06:00 AM
1 2 ·3· ·4·	Line use: C Answer calls only Enable this line to: C Make calls Line may answer when not making calls	
	 ✓ Wait for dialtone before dialing ✓ Touchtone dialing ✓ Pulse dialing 	
	Optional line access and billing codes: Prefix: Suffix:	
	If phone number is 11 digits or more, use:	

Under **Select line**, choose one or more of the available lines to be used as "call-in lines" from the list on the left.

In the **Line Use** area, select **Make calls** if the line will be used to *place calls* and enable "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.

NoneTree					
avigation Help					
PhoneTree	Tools	Tasks	InfoLine	Admin	Call Center
call center Lines 1 to 4 Phone Tr Adams, N 1 336 555 Start Call Phone Tr Line Card is 1	5 to 8 9 to 12 13 to 1 deghan -9475 ee: Line 3 not Present	16)	e available e available eneTree: Line 4	•	Pause Stop
PhoneTre	e Information/ Status		Di 1 C 1. 1	•	09:10 AM More Info →
# Phone	aTree 1	Callion Mid	1 0/16	DB:30 AM DB:30 F	er LairDays M SMTWTES
No errors					

Note: Make sure you leave your VoiceWave system in the Call Center in Calling Mode (see page 94). If you attempt to call in from another phone and the Call Center is not running, you will not be able to use Remote Access.

Configuring Remote Options:

From the Admin Desktop, click on the Configure Remote Operation icon.



Configure Remote O	peration		
Basic Advanced			
Remote access config	guration:		
🔽 Require caller to	confirm ID when calling i	n	
Record quality:	Best	•	
Number of rings till answer:			
<u></u>			
KCancel	<u>D</u> efaults	<u>H</u> elp	

Check **Require caller to confirm ID** when calling in if you want 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 icon by typing in its number, and then enter the appropriate PIN code. **Example:** To select "PhoneTree 001" with PIN code "5678":

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

VoiceWave 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

[2] Call Menu

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

[3] Mailbox Menu

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

[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

[8] Exit & Call

- [1] Call All Selected
- [2] Resume Calling
- [*] Repeat Menu
- [#] Main Menu
- [9] Quit (No Call)
- [*] Repeat Main Menu

- [6] Play More Information
- [7] On/Off Introduction
- [8] On/Off More Information
- [*] Repeat Menu
- [#] Main Menu
- [6] Add Groups†
- [7] Delete Group
- [8] List Groups+
- [*] Repeat Menu
- [#] Main Menu
- [8] Play Outgoing Message
- [9] Record Outgoing Message
- [*] Repeat Menu
- [#] Main Menu
- [*] Repeat Menu
- [#] Main Menu

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. † 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 VoiceWave system remotely and:

your VoiceWave system 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 message job you enable remotely will be initiated instead.

your VoiceWave system is not remote enabled:

- You will be instructed to enable Remote Operation.
- This must be done in advance from the computer where your VoiceWave system is installed and may not be done remotely.

PhoneTree Client

(VoiceWave Plus & VoiceWave Premium only)

PhoneTree Client: Initial Setup: Host PC Configurations

PhoneTree Client

The PhoneTree Client is a remote operation tool for your VoiceWave 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 message 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. To download a copy of PhoneTree Client (VoiceWave Plus or VoiceWave Premium models only), please visit phonetree.com/support.

Note: PhoneTree Client does not provide the ability to view the **List Editor** (see page 38, step 3) or many 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:

😂 Program Files			
File Edit View Favorites To	ols Help	1 2020	
🕒 Back 🝷 🕥 – 🤔 🎾	Search 🎼 Folders		
Address 🛅 C:\Program Files			💌 🄁 Go
System Tasks Image: Contents of this folder Image: Contents of this folder Image: Contents of this folder Image: Contents of folder Image: Contents of this folder Image: Contents of folder Image: Contents of this folder Image: Contents of this folder Image: Contents of this folder	Marke Market A.0 Mar	Size Type File Folder File Folder	Date Modified 11/14/2006 5:18 PM 8/14/2007 1:41 PM 8/11/2007 1:41 PM 8/11/2004 5:12 PM 8/11/2004 5:12 PM 12/s/2007 7:55 AM 12/s/2007 7:56 AM 12/s/2007 7:56 PM 11/2/s/2007 7:16 PM 4/10/2006 2:06 PM 11/2/s/2007 1:33 PM 6/12/2006 1:027 AM 4/18/2007 7:42 PM 2/s/s/2006 3:05 PM
move us fouer for the folder for the folder publish this folder to the Web Share this folder Fare this folder Delete this folder Delete this folder	Symante: Symante: Symante: Symante: Tornitk: Tornitk: Corpress to "PhoeTreetWPu.rar" Noicewest: Mindows for eate Shortut Windows for eate Shortut State Shortut State Shortut State Shortut Shortus	File Folder File Folder File Folder File Folder File Folder File Folder File Folder File Folder File Folder File Folder	1/23/2007 12:21 PM 11/14/2007 10:33 AM 8/31/2004 13:39 PM 8/11/2004 5:20 PM 10/12/2007 3:27 PM 8/3/2006 1:33 PM 5/21/2007 3:16 PM 1/25/2007 3:16 PM 8/11/2007 5:11 PM
 Local Disk (C;) My Documents My Computer My Network Places 	WINDOWS RARE WINDOWS PTP Properties	File Folder File Folder File Folder File Folder	8/11/2004 5:13 PM 8/4/2006 11:41 AM 10/19/2006 2:53 PM 8/11/2004 5:15 PM

1

First, the PhoneTreeMVPu folder must be shared on the computer where your VoiceWave system is installed (Host PC). Browse to C:**Program Files** and right-click on the **PhoneTreeMVPu** folder, then click **Sharing and Security**....

PhoneTree Client: Initial Setup: Host PC Configurations, continued

PhoneTreeMVPu Properties 🛛 🛛 🔀				
General Sharing	Security Customize			
You can network folder.	n share this folder with oth <. To enable sharing for th	ier users on your nis folder, click Share this		
🔿 Do not shar	e this folder			
💿 Share this fo	older 🔫	Output this with the		
Share name:	PhoneTreeMVPu	Select this option		
Comment:				
User limit:	 Maximum allowed 			
To set permissi folder over the	Allow this number of users who access network, click Permission.	this Permissions		
To configure se Caching.	ettings for offline access	lick Caching		
Set up access for individual New Share users here w this folder to be shared				
W lan outer comparents on the network. View your Windows Firewall settings				
	ОК	Cancel Apply		

	_	

On the Sharing tab, click Share this folder, then click Permissions.

Permissions for PhoneTreeM	/Pu 🛛 ? 🔀
Share Permissions	
Group or user names:	
🖸 Todd Jones (TJones@PCS.I	LOCAL)
Everyone	
	Add Remove
Permissions for Todd Jones	Allow Deny
Full Control	
Change	
Head	
Set all these	
to Allow	
OK	Cancel Apply

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.

PhoneTree Client: Initial Setup: Remote PC Configurations

Initial Setup: Remote PC Configurations:





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....

beleut a si lare	a network rold	ler		
	🗆 👷 Ph	oneTreeMVPu		^
	😟 🧰	ASPxml		T
	E 🚞	ASPxmlSend		
	· 🖻 🧰	CustomImport		
	🕀 🚞	Debug		
	· E	Help		
	🕀 🧎	InstallCache		
	🗷 🚞	LOGS		
	🕀 🔁	Temp		E
	🔳 🛅	User		
	실 Pri	nters and Faxes		
	🙆 Sd	neduled Tasks		~
<			>	

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**.

PhoneTree Client: Initial Setup: Remote PC Configurations, continued





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 Host PC.

Initial Setup: Client Configurations (Remote PC):

PhoneT	reeMVP Network Client	
	The PhoneTreeMVPu server machine is not responding OR The path to PhoneTreeMVPu.exe is not valid!	
PhoneTreeMVP Network Cli	ent	X
CustomImport.dat on the Phone	reeMVP system is not available at this time. You canno	t configure the Translator.
	ОК	

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.

Configure PhoneTree V1.1.16	
Path to PhoneTreeMVPu.exe (look in \Program Files\PhoneTreeMVPu)	
Path to Folder for PhoneTree LOCAL DATA (C:\Program Files\PhoneTreeClient) Make Default Local Path	Click here to locate the PhoneTreeMVPu.exe file
Choose the translator that matches this application's file format.	
Delay stop after record. Check this if the end of your recording is being clipped.	

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**.

PhoneTree Client: Configure Your Client (Remote PC), continued



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 your Host PC to use when starting a call session. **CSV** will translate any commadelimited 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.



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:

PhoneTree Call	Status					X
File Help						
PhoneTree Name Blue Ridge Group Blood Drive Softball Team)	Status Calling Calling Calling	Pri Hi Mid Mid	Placed 36 42 0	Completed 33 / 127 42 / 80 0 / 16	
Nursery		Done	Mid	12	12712	
SERVER Status	 Calling Paused Off 	Phone [®]	[ree	÷	More Info	→ it



Click on the **PhoneTree** button.

Choose a PhoneTree	
Blue Ridge Group Event Committee Administrative Mission Trip Blood Drive Meals On Wheels Grounds Committee Greeters Fund Raising Caretakers Youth Sottball	
Volunteers Band Youth Study Adult Study News Letter Softball Team Girls Basketball	<u>C</u> ancel <u>O</u> K

2 Choose the PhoneTree you would like to access from the menu, then click the **OK** button. Icons protected by a password will be marked with an asterisk (*). **Note:** Be sure the icon you select already has a **Call List** file created for it (see page 38, step 2).

Setup		
Call Options		all
Play	Speaker Volume 	Pause
<u>R</u> ecord		Stop
Seconds: 0.0	- 1 -	<u>C</u> all List
Call the new list Lb	ave selected: Use File	e->Select



The Easy Call dialog will appear. From the Setup menu, choose Call Options.

Call Times	Call	Options	Transfer ()ptions Ac	lvanced Op	tions Rem	note Option
Call On Days:	🔲 Sun	🔽 Mon	🔽 Tue	☐ Wed	🔽 Thu	🔽 Fri	☐ Sat
) on't Call Before:) on't Call After	08:30 AM 08:30 PM	10:00 AM 07:30 PM	08:30 AM 08:30 PM				
Start Night Messages At:	05:30 PM						
			Allow dif	ferent times fo	r each day		
🔽 Use Pause/F	lesume		∏ Use	e Scheduled 9	Start Date/Tim	ne	
Pause Call At	0!	5:00 PM					
Resume Call At:	00	5:00 PM					

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.

	Call Options	
\square	Call Times Call Options	Transfer Options Advanced Options Remote Options
	Hangup Detection Allow Star to Repeat Play Message Twice to Every Person Quick Call Mode CountRepliesMode Job Priority: Mid Mid OFF OFF	Max Rings to No Answer: 7 H Max No Answers: 15 I Max Length of Answering Machine Message (secs) 25 J Pause this many seconds after the message finishes to permit user time to press
	<u>Q</u> K <u>C</u> ancel	

5

Click on the Call Options tab.

A. Selecting the **Hangup Detection** option means that if the called party hangs up early, VoiceWave 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 VoiceWave delivers a message, it will play the same message twice. This option significantly lengthens the time ti takes to finish a message 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, the VoiceWave system 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, the VoiceWave system will revert to its normal calling setups (Recommended setting: OFF).

E. Count Replies Mode tells the VoiceWave system 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 as calling will stop 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 message jobs, High for when a job is urgent and needs to be completed quickly, and Low for message jobs that aren't as time-sensitive as most. If you select High, your message 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 message job should be active before it expires. This is useful for large message 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 message job (Recommended setting: **OFF**).

H. Max Rings to No Answer refers to the number of rings before the VoiceWave system 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. The VoiceWave system will call a number back this many times if it gets a busy signal or no answer. Automatic reattempts to these numbers are spread 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 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 were using an answering machine. 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 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 the VoiceWave system 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).

- Dialing	can rimes can option.	I Paperer Librione Laduanood Liptionel Remote Librione
Prefix: Suffix: L1 L2 L3 L4 Pager:	Dialing: Prefix: 1 2 3 4 Pager:	Duplicates \Blocked Numbers: Daily Calling: C Keep Duplicates C C Same Phone C C Same Name and Phone Finit When: Remove Blocked Never Numbers Create Results File (Jobxx.out) for another application. C Allow Client to View Call Status Call Logging Off

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 the VoiceWave system 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 the VoiceWave system will leave your callback number on the pagers it calls.

C. Duplicates/Blocked Numbers: The VoiceWave system 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 do not want to remove the people on the Blocked Number list (see page 159).

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 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 message job results after a message job is complete. **Note:** This same setting must also be enabled on the Host PC in order to work (see page 137).

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.

- Mossage		-11
Message	Speaker	
<u>P</u> lay	<u> </u>	Pause
Becord		Stop
Seconds: 1.9		<u>C</u> all List
C. Call the new list Libr	we calented: Llos Fils	-> Salaati

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 140) for instructions on how to do this.

b. Call the PhoneTree already has: *(name of file)*.mdb: Use this if you want the VoiceWave system 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 Host PC and select a list for this PhoneTree).

PhoneTree Client: Daily Operation: Starting a Call Job

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





To start calling, click the Call List button on the Easy Call screen:

a neih					
honeTree Nar	ле	Status	Pri	Placed	Completed
lue Ridge Gro	lip -	Calling	Hi	70	67 / 127
Blood Drive		Calling	Mid	42	42 / 80
und Raising		Calling	-Mid	0	0/26
oftball Team	Calle will I	ac hosuen or	Mid	0	0/16
lursery	Galls will r	ie hanzen az	Mid	12	12/12
515	your new j	ob is added.			
	4				
		/			

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 message 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):

Before you can access the Call Statuses from the Client, you must do the following: On the Host PC, browse to this folder: C:\Program Files\Windows NT. Locate the folder named Accessories, right-click on it and choose Copy. Next, go back to C:\Program Files, right-click in that folder and choose Paste. This will copy the Accessories folder into the Program Files folder.

Once your message job is complete, you can check the Call Status, for a complete report on the message job. Here's how:

Call Options		
Email Times/ Days Call Settings Tre Don't call duplicates with same: C Phone # C Name and phone # C Call all duplicates Don't call muthors in Don't call muthors in	nsfer Adv Dptions Adv Dialing Remote Copy Centr Export data: Create export file for use by another application Allow network clients to view call status of this list: Call logging Logging is OFF	al Database
Make sure this box is checked.	Deliver message to answering machines: Always Joily calling: Auto call each day	
<u>Q</u> K <u>C</u> ancel	Defaults	Help

Т

First, you must visit the Host PC where the VoiceWave system is installed. Open the PhoneTree 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 134). You will only need to do this once for each PhoneTree.

PhoneTree Call Status					X
File Help					
PhoneTree Name	Status	Pri	Placed	Completed	1
Blue Ridge Group	Calling			33 / 127	
Blood Drive	Calling	Mid	42	42 / 80	
Softball Team	Calling	Mid	0	0/16	
Nursery	Done	Mid	12	12/12	
SERVER Status 💿 Calling O Paused		_1	÷	More Info	•
O 0ff	PhoneT	ree		Exi	

Now, go back to the PhoneTree Client on your Remote PC and click the **PhoneTree** button on the Call Status screen.

PhoneTree Client: Daily Op.: Checking Call Status (Remote PC), cont.





Choose the PhoneTree for which you would like to view the Call Status and click OK.

Setup		
Update Call Results		~all
View Call List	Speaker	
Select Call List	Volume	Pause
Exit	<u></u>	
<u>R</u> ecord		Stop
Seconds: 2.0		<u>C</u> all List
Call the new list I	have selected: Use Fi	le->Select!







4

Click the Yes button on the dialog box that appears.





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

PhoneTree Client: Daily Op.: Checking Call Status (Remote PC), cont.

- 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).





Choose View Call List from the File menu of the Easy Call screen.

📕 Job.txt - WordPad										K)
File Edit View Insert Forma	at Help									
D 🛩 🖬 🍯 🗟 🛤	X 🖻 🛍 🗠 🗖	•								
PhoneTree3500 Call	Status results	s as of: :	12-06-2007 at 03:0	З РМ						1
Name		Phone	Translated Phone	Last	Ca	all Status	Date	Time		R
Adams, Meghan	(336)	555-9475		Ans 1	by	Person	12-06-2007	01:43	PM	-
Anderson, Rebecca	(336)	555-9949		Ans 1	by	Person	12-06-2007	01:45	$\mathbf{P}\mathbf{M}$	
Forester, Lauren	(336)	555-8938		Ans 1	by	Person	12-06-2007	01:47	$\mathbf{P}\mathbf{M}$	
Gonzales, Jessie	(336)	555-7911		Ans 1	by	Person	12-06-2007	01:50	$\mathbf{P}\mathbf{M}$	
Horton, Maria	(336)	555-5579		Ans 1	by	Person	12-06-2007	01:52	ΡM	
Morton, Carrie	(336)	555-4741		Ans 1	by	Person	12-06-2007	01:54	$\mathbf{P}\mathbf{M}$	
Mory, Julia	(336)	555-3354		Ans 1	by	Person	12-06-2007	01:58	$\mathbf{P}\mathbf{M}$	
Motsinger, Jenna	(336)	555-4354		Ans 1	by	Person	12-06-2007	02:01	$\mathbf{P}\mathbf{M}$	
Nostitz, Carol	(336)	555-2112		Ans 1	by	Person	12-06-2007	02:04	$\mathbf{P}\mathbf{M}$	
Pirkle, Christina	(336)	555-1410		Ans 1	by	Person	12-06-2007	02:06	$\mathbf{P}\mathbf{M}$	
Rabil, Emily	(336)	555-6392		Ans 1	by	Person	12-06-2007	02:08	ΡM	
Rodgers, Sarah	(336)	555-9513		Ans 1	by	Person	12-06-2007	02:11	ΡM	

10

The **Call List** (including the most recent Statuses) for this PhoneTree will be opened automatically as a text file (**Job.txt**) in WordPad. This is a new text file generated by the VoiceWave system and now resides in your PhoneTree Client folder locally, on your computer. It should look like the picture above.

PhoneTree Client: Reference: Importing Data (Remote PC)

Reference: Importing Data (Remote PC):

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

The VoiceWave system 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 the VoiceWave system 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 129) Following is an example using the most common translator, **CSV**, assuming that you have placed the exported file in the PhoneTree Client folder.



with the CSV translator.

PhoneTree Call Status					×
File Help					
PhoneTree Name	Status	Pri	Placed	Completed	
Blue Ridge Group	Calling	Hi	36	33 / 127	
Blood Drive	Calling	Mid	42	42 / 80	
Softball Team	Calling	Mid	0	0/16	
Nursery	Done	Mid	12	12/12	
SERVER Status Calling Paused Off	PhoneT	ree	÷	More Info E <u>x</u> i	•

1 First, confirm that **CSV** is chosen on the **Configure PhoneTree** screen (see page 147). This translator is actually stored on the Host PC, *not* locally on your computer. Now, click the **PhoneTree** button on the main screen.

Blue Ridge Group Event Committee Administrative Mission Trip Blood Drive Meals On Wheels Grounds Committee Greeters	-	
Fund Raising Caretakers Youth Softball Volunteers Band Youth Study Adult Study	Cancel	



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

PhoneTree Client: Reference: Importing Data (Remote PC), cont.





Choose **Call the new list I have selected**, then choose **Select Call List** from the **File** menu.

Select a Call L	ist to send to P	honeTree			? 🛛
Look in:	PhoneTree	Client	•	- 🗈 💣 📰 -	
My Recent Documents Desktop My Documents	Documents	eeClent.exe ent.exe alQth.ocx			
My Network Places	File name:	clientlist.txt		•	Open
	Files of type:	User (*.*)		•	Cancel

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.

💸 Preview: clientlist.txt	
PhoneTree will import this data using the translator you choose in 'Configure'.	<u> 0</u> K
Roberts, Mike, 5559656 Sherman, Stuat, 5554512 Sherman, Tacy, 13365550633 Smith, John, 5551772 Brown, Elwood, 5555261 Fischer, Russell, 5559921 Pennington, Noel, 5555822 Smith, Paul, 13365555693 Underwood, Randy, 3385550936 Welch, Luther, 5551212 White, Charles, 133655552372 Zimmerman, Taylor, 13365551256 Brown, Ziggy, 5555261 Carter, Vincent, 13365555958	
<	



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

PhoneTree Client: Reference: Importing Data (Remote PC), cont.



You will be taken back to the **Easy Call** screen. Record a message if you haven't already (follow Step 8 on page 135) and click the **Call List** button. Notice that the name of your list now shows up on the screen.

PhoneTree Call Status								
File Help								
PhoneTree Name		Status	Pri	Placed	Completed			
Blue Ridge Group		Calling	Hi	70	67 / 127			
Blood Drive		Calling	Mid	42	42 / 80			
Fund Raising		Calling	Mid	0	0/26			
Softball Team Nursery Calls will be pa		~ "	Mid	0	0/16			
		aused as	Mid	12	12/12			
your new job is added.								
SERVER Statu	us O Calling O Paused O Off	PhoneTr	ee	÷	More Info	•		

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 message 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 128) 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 VoiceWave system is running and is currently in its call mode (the Call Center on the Host PC). **Pausing!** or **Paused** means that the VoiceWave system is running, but not in call mode (one of the other Desktops may be displayed). **Off** means that the VoiceWave system is not running on the Host PC.

Call Status Screen Headers

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

Priority: Either Low, Mid (the default) or Hi. See pages 148-149 for instructions on how to change the priority for a message job.

Placed: Will display the number of calls placed. This number is often larger than the number of completed calls because the VoiceWave system 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 message job was initiated.

Start Time: The time (on the Start Date) when the current message 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 131).

Till: Displays the Don't Call After time you specified on the Call Times tab of the Call Options dialog (page 131).

Call Days: Displays the **Call On Days** you specified on the **Call Times** tab of the **Call Options** dialog (page 131).

PhoneTree Client: Reference: The Call Status Screen (Remote PC), cont.

Pause At: Displays the **Pause Call At** time you specified on the **Call Times** tab of the Call **Options** dialog (page 131).

Resume At: Displays the **Resume Call At** time you specified on the **Call Times** tab of the **Call Options** dialog (page 131).

Night: Displays the **Start Night Messages At** time you specified on the **Call Times** tab of the **Call Options** dialog (page 131).

Call File: Shows the file that each PhoneTree is currently using for calling. **Note**: Any file sent from 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 131).

MaxNo9s: Displays the number of attempts the VoiceWave system 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 133). **Note**: Will only display a number if you chose Phone System as the Method.
Troubleshooting



Line Card Not Found

- Q. I keep getting an error message that says "Line Card Not Found."
- A. This error always means that the VoiceWave 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/Windows Vista/Windows 7 and/or the PC is set to hibernate.

Remedy: To manage power, Windows XP/Windows Vista/Windows 7 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 19-21, then:

- 1. Disconnect the power cable from the PhoneTree hardware, 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 power adapter 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 the VoiceWave 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 the VoiceWave software before Windows finishes booting.

Remedy: Whenever restarting your PC, be sure all boot activity has completed prior to starting the VoiceWave software.

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 (**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 the VoiceWave software using the Control Panel in Windows. Then reinstall the VoiceWave software from the original disc. **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 adapter. Then remove your USB root hub by right-clicking on "My Computer" or "Computer," selecting the Device Manager, 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 adapter 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 **800.555.0559**.

- Q. I connected the USB cable before installing the VoiceWave 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 adapter.
 - 3. Reconnect the PhoneTree power adapter.
 - 4. Wait as Windows recognizes your new hardware and loads the drivers. This step may take several minutes.

Troubleshooting: Please Connect Telephone Cord

	Tree Tools	Tasks	S	l lr	nfoLine	Admin	Call Center
call c	enter		-				×
Lin	es 1 to 4 5 to 8 9 to 12 13 to	16)					_
D	honoTroci Lino 1	405	Dh	noTroo	Line 2		Pause
	nonerree. Line i	<u>v.</u>		Jienee	Lille Z	v [-	Chan .
							stop
Ple	ease Connect Telephone Co	ord	No.	available			
P	honeTree: Line 3	-	Ph	neTree	line 4		<u> </u>
	Line o	V	۲				Volume
			T				Mute
Lin	e Card is not Present		Line	Card is not	Present		
			<u> </u>			I	U9:10 AM
Pł #	PhoneTree Information/ Status	Status	Pri	Placed	Completed	Not Before Not After	More Info
1	Social Committee	Calling	Mid	2	1/38	08:30 AM 08:30 PM	SMTWTFS
9	Research and Development	Calling	Mid	0	0/4	07:30 PM 09:30 PM	SMTWTFS

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 VoiceWave system 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 VoiceWave 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 previously connected to the PhoneTree hardware.

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 the PhoneTree hardware. 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.



Troubleshooting: Please Connect Telephone Cord, continued

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 the VoiceWave system to use when making calls.

4. Disconnect, then Reconnect the Power Adapter

Disconnect the power adapter 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 the PhoneTree Hardware

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 146.

Select line: • Detected	Use different settings at night	Night is from: 05:30 PM until 06:00 AM
2 -3. -4.	Line use: C Answer calls only Enable this line to: Walke calls Walk for diatone before dialing Touchtone dialing Diptional line access and billing codes: Prefix Suffix If phone number is Suffix Suffix	6
<u>о</u> к	Cancel Defaults Test Line	<u>H</u> elp

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 the VoiceWave system can detect a dial tone (click the **Get dialtone** button) and make a test call (enter a number 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 **800.555.0559**.

Test Line Num	ber: 1	X
Get dialtone	0	Volume
Number to dial:	800 555 5555	
Dial number		
Say Hello		
<u>K</u>		

Troubleshooting: Call Remote Won't Answer

honoTree	Taala	Taska		1	of al in a	Admin	Cell Contor
nonerree	loois	Tasks	5		noLine	Admin	Call Center
call center							×
Lines 1 to 4	5 to 8 9 to 12 13 to	16]					
Phone Tr		- -	Dh	noTroc	ulino 2		Pause
Adams, I	Veghan	V .		JIIerree	LINC Z		
1 336 555	-9475						Stop
Start Call			Non	e available			
			-				
PhoneTr	ee: Line 3	•	Phe	oneTree	: Line 4	<u> </u>	Volume
							Muto
							Indice
Line Lard is	not Present		Line	Lard is not	Present		09:10 AM
PhoneTre	a Information/ Status						More Info
# Phon	eTree	Status	Pri	Placed	Completed	Not Before Not Af	ter Call Days
1 Phon	eTree 1	Calling	Mid	1	0/16	08:30 AM 08:30	PM SMTWTFS
No errore							

Call Remote Won't Answer

- Q. Why won't the VoiceWave system answer when I try to call in to configure a calling job?
- A. The Remote Access feature allows you to access your VoiceWave system using any touch tone telephone to change call settings and to initiate a calling job. If not configured correctly, the VoiceWave system 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 117). Following are some common causes for this problem:
 - 1. Check to make sure that the VoiceWave computer is on, and that your VoiceWave system is correctly connected to the computer with the Call Center running.

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

e calling 6897	Override "Time/Days" tab settings to allow remote cal session to begin immediate	l y	
for remote access	·		
Enable remot	t e calling and		
e Times/Day	s are both checked		
<u> </u>			
	te calling 6897 for remote access Enable remote le Times/Day	to remote access Enable remote calling and te Times/Days are both checked.	Covernide "Time/Days" lab 6897 Contended a low remote call session to begin immediately for remote access Enable remote calling and le 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 the VoiceWave system 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 VoiceWave system (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.
- Confirm that you are using the correct telephone number for the line assigned to the VoiceWave system.
- **6**. Make sure the line assigned to the VoiceWave system is not shared with another device that may be set to answer calls (fax machine, etc.).

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 message job has not been sent to the VoiceWave Host PC. Why?
- A. Make sure the VoiceWave 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 134 and 135). Also, make sure you have first chosen Update Call Results (page 138) – 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 142-145 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 VoiceWave 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 142-145 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 VoiceWave software is not in the Call Center.
- d) The CustomImport.dat file on the Host PC has been moved, deleted or corrupted.

Troubleshooting: PhoneTree Client, continued



'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 126).

	Kasy Call: Collections	
	Message Play Speaker Volume Becord Stop Stop Stop	
	Seconds: 0.0	'No List Available' message
'Call Options' warning	Call the new list I have selected: Use File>Select Call the list PhoneTree already has: No list available Please run Setup-Call Options to create an options file for this PhoneTree.	

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 call 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 you have purchased **more** than 2 lines AND 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, these switches are preset to their correct configuration before your PhoneTree unit(s) are shipped to you (based on your order). 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 the DIP switches:

- 1. Shut down the VoiceWave software.
- 2. Disconnect all cables connected 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:



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, these switches are preset to their correct configuration before your PhoneTree unit(s) are shipped to you (based on your order). 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 VoiceWave software.
- Disconnect all cables connected to your PhoneTree unit(s).
- 3. Remove 4 screws from the back cover.
- 4. Slide the circuit board out only far enough to see the switches.
- Change the switches with a sharp pointed object, following the directions printed directly on the circuit board in white (see photograph at right).
- 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:

To change the name and/or graphic for any icon on any Desktop, follow the instructions below:



1. Right-click on the icon you wish to change, then click Edit This Icon.

Desktop Icon	
Desktop Icon Select an icon: Select an icon: Artenna.ico Arrow.ico Bible.ico Bithday.ico Caduceus.ico CaduceusFolder.ico Calendar.ico Calendar2.ico Clipboard.ico clock.ico Clock2.ico Computer.ico	Enter a name: Blue Ridge Group Visible Desktop preview: Blue Ridge
	ncel <u>H</u> elp

2. Choose a icon graphic from the **Select an icon** box (when a graphic is selected, its image will appear in the Desktop preview pane). Make changes to the name of the icon in the **Enter a name** box. When finished, click **OK**.

Blocking Numbers and Email Addresses:

If you have a phone number, text number and/or email address (text and email blocking are only available with the VoiceWave Plus and VoiceWave Premium models) that the VoiceWave system should never contact, you can add it to the Blocked Numbers database.





There are two methods to blocking a number and/or email address:

From the Admin desktop:

From the Desktop View, click the **Admin** tab, and then click on the **Blocked Numbers** icon. Select the form of contact you wish to block, and then enter the person's name and contact information in the corresponding fields. To keep a record of why a person was blocked, enter that information in the **Comment** field (optional). To resume contacting a number or email address, click on the entry you wish to remove, and then click **Delete**.

File Edit T	ools View Search Setup Call Import Hel	•	_			
New C	Translate Phone Numbers Clear Call Status Change Job Expiration	•	er			
ID T	Blocked Numbers			Add to Blocked Numbers		
10 15 18	Blocked Emails Blocked Texts		Remove From Blocked Numbers Add Tagged to Blocked Numbers			
14	Trim List to Match Filter			Process Blocked Numbers		
1	Clear Entire List		1	Not Called Yet		
16	Clear Calls 'Placed' and 'Completed' Counters ReSync this List to the Central database			Not Called Yet		
5				Not Called Yet		
7				Not Called Yet		
21	Reindex (remove unused ID numbers)			Not Called Yet		
13 🗹	Janet Williams		1	Not Called Yet		
20 0	1-6-34/3			Net Celle d Met		

From the List Editor:

Click on the person you wish to block. Next, from the top of the List Editor screen, click **Tools > Blocked Numbers** (to block phone calls), **Blocked Emails** (to block email messages, if applicable), or **Blocked Texts** (to block Free Text messages, if applicable). After making your selection, choose **Add to**... to add this person's contact info to the Blocked Numbers database. Repeat for any additional forms of contact.

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.



1. Click Help, then Activate Line 2... from any desktop view.

Enable Second Line	
Activating your second line and doubling your calli and easy.	ing capacity is quick
Purchase Online	
For quick, on-line payment to activate your second port, cho	ose: <u>Purchase Now!</u>
Purchase by Phone	
To purchase by phone, call 800.951.8733 x 2026 and provid your Unit ID:	
Enter your second port ACTIVATION CODE below ar	nd click [Activate]:
	Activate

2. 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 VoiceWave System

Once you have finalized your configurations, we recommend creating a backup. This section will walk you through the suggested way to backup the VoiceWave 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 VoiceWave configurations.

Please Note: Keep your current VoiceWave <model> Installation CD in a safe place. In the event you ever need to restore your VoiceWave system, or move it to another PC, you MUST use the same version of the VoiceWave software your backup files were created from (to identify your VoiceWave software's version, click Help ► About from any Desktop view).

PhoneTreeMVP	Ŭ.	
ile Edit View Favorites Tools Help		
New 🕨	Eolder	
Create Shortcut	Shortcut	
Delete	A Briefcase	🗸 🏳 Go
Rename	N Bitmap Image	Size Type
Properties	Microsoft Word Document	File Folder
Close	Microsoft Office Access Application	File Folder
Dublich this fai	Microsoft PowerPoint Presentation	File Folder
Web	Microsoft Office Publisher Document	File Folder
🔛 Share this fold	Tayt Deg ment	File Folder
~		File Folder
	Wave Sound	File Folder
Other Places	Microsoft Excel Worksheet	File Folder
	Compressed (zipped) Folder	File Folder

First, make sure no calls are being made and exit the VoiceWave software. On the VoiceWave 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 "VoiceWave Backup <current version> <current date>" and use the current VoiceWave software version (to identify your VoiceWave software's version, click Help ▶ About from any Desktop view) and the current date (mmddyy) as part of the name (e.g., VoiceWave Backup 6.9.4 061909).

itomo	LOGS			File Folder
ritems	🚞 Temp			File Folder
items	User	200		File Folder
d items	ी Aut	Open	116 KB	Application
d items	3C1.	Explore	92 KB	Application I
	3C1.	Search	84 KB	Application I
	C1F	Scan for Viruses	64 KB	Application
۲	BB ckM —		1 KB	Microsoft O
	🙆 ckM	Send To	228 KB	Application
	🖬 Clie 💡	Cut	1 KB	BIN File
	🖬 Clie	Copy	66 KB	BIN File
	CJ. EZC	Paste	32 KB	Application
s	CJ.LSH -		96 KB	Application
	MAI	Create Shortcut	564 KB	Application
-	🚢 Onl	Delete	80 KB	Application

2. Next, right-click on the "PhoneTreeMVPu" folder and choose **Copy** from the sub-menu that appears.

Appendices: Backing Up/Restoring Your VoiceWave System, continued

C), EZCombiner.exe	2	32 KB 96 KB	Application Application	
MAPIMessage MAPIMessage OnDemandSe PCSAdddb.mc PCSPastedb.r PhoneTreeMV PhoneTreeNa PhoneTreeNa PhoneTreeNa PhoneTreeNa Soccer Team.	Open Explore Search Sharing and Security Scan for Viruses Send To	64 KB 80 KB 28 KB 28 KB 56 KB 1 KB 80 KB 80 KB 20 KB	Application Application Microsoft Offic Microsoft Offic Application Text Documen Application Application Microsoft Offic	
SOUPServer.	Сору	64 KB	Copying	X
ThisSite.dat	Paste	1 KB		
 NTSTest.wav WebServiceCo WinFaxProFa: 	Create Shortcut Delete Rename	15 KB 56 KB 56 KB	num14.wav From 'Menu' to 'Menu' 15 Seconds Remaining	Cancel

- Right-click on the "VoiceWave 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 "VoiceWave 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 "VoiceWave 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 VoiceWave 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 VoiceWave System

To restore your VoiceWave system, you will require a **VoiceWave** (model) **Installation CD** containing the same version of the VoiceWave software used to create the backup folder (see "Backing Up Your VoiceWave System" on page 160).

Please Note: If you have misplaced your **VoiceWave** (model) **Installation CD**, or your copy has a later version number than your "VoiceWave Backup" folder, please contact PhoneTree Customer Support at **800.555.0559**, or by email at **support@phonetree.com**.

- 1. Make the most recent "VoiceWave 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 VoiceWave 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).

Appendices: Backing Up/Restoring Your VoiceWave System, continued

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

Hardwa	re Installation
1	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. <u>(Tell me why this testing is important.)</u> 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 VoiceWave software, copy the backed-up "PhoneTreeMVPu" folder in to the **C:\Program Files** directory on the new computer.
- 5. Launch the VoiceWave software. All of your call lists, messages and option preferences will be available just as they were before they were backed-up

Automatic Updates:

All VoiceWave software can be configured to automatically check for software updates each time it is launched. To enable this feature, you will need your Account ID number that was included in your initial shipment. If you can't locate your Account ID, please contact PhoneTree Customer Support at 800.555.0559.



1. With the VoiceWave software open, click Help ► Product Updates from any desktop screen.

5. Product Up	lates	×
Account ID		

2. Enter your Account ID in the box provided, and then click OK.



3. The next time you launch the VoiceWave software and an update is available, this screen will appear. Click **Update Now** to download and install the latest version, or click **Remind Me Later** if you wish to update at a later time.

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 VoiceWave system, please call 800.555.0559 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 301 N. Main Street, Suite 1800 Winston-Salem, NC 27101

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: The PhoneTree hardware 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 800.555.0559. 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 301 N. Main Street, Suite 1800 Winston-Salem, NC 27101

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: The PhoneTree hardware contains no user-serviceable parts.

Notes

Regulatory Information

Regulatory Information: Model No. G2PT

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. 301 N. Main Street, Suite 1800 Winston-Salem, NC 27101 800.555.0559

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. 301 N. Main Street, Suite 1800 Winston-Salem, NC 27101 800.555.0559

Regulatory Information: Model No. G2PT-R24

Regulatory Information Model No. G2PT-R24

This equipment complies with Part 68 of the FCC rules and the requirements adopted by the ACTA. On the BOTTOM COVER of this equipment is a label that contains, among other information, a product identifier in the format US:AAAEQ##TXXXX. If requested, this number must be provided to the telephone company.

List all applicable certification jack Universal Service Order Codes ("USOC") for the equipment. For some types of analog and digital systems, list associated Facility Interface Codes ("FIC") and Service Order Codes ("SOC"). These are required when the customer orders service from the local telephone company. Refer to Alliance for Telecommunications Industry Solutions ("ATIS") Technical Report No. 5 for a more extensive listing of jack configurations and their designations (e.g., RJ11C), or refer to the Telecordia NC/NCITM Decoder for a full listing. 24 Pair Service.

The REN is used to determine the number of devices that may be connected to a telephone line. Excessive RENs on a telephone line may result in the devices not ringing in response to an incoming call. In most but not all areas, the sum of RENs should not exceed five (5.0). To be certain of the number of devices that may be connected to a line, as determined by the total RENs, contact the local telephone company. For products approved after July 23, 2001, the REN for this product is part of the product identifier that has the format US:AAAEQ##TXXXX. The digits represented by ## are the REN without a decimal point (e.g., 03 is a REN of 0.3). For earlier products, the REN is separately shown on the label.

If the terminal equipment G2PT-R24 causes harm to the telephone network, the telephone company will notify you in advance that temporary discontinuance of service may be required. But if advance notice is not practical, the telephone company will notify the customer as soon as possible. Also, you will be advised of your right to file a complaint with the FCC if you believe it is necessary.

The telephone company may make changes in its facilities, equipment, operations or procedures that could affect the operation of the equipment. If this happens, the telephone company will provide advance notice in order for you to make necessary modifications to maintain uninterrupted service.

If trouble is experienced with equipment G2PT-R24, or for repairs or warranty information, please contact Personal Communication Systems, Inc. 301 N. Main Street, Suite 1800, Winston-Salem, NC, 27101. If the equipment is causing harm to the telephone network, the telephone company may request that you disconnect the equipment until the problem is resolved.

There are no user serviceable parts in this equipment. Please contact customer support at Personal Communication Systems, Inc. at the above address for service.

Connection to party line service is subject to state tariffs. Contact the state public utility commission, public service commission or corporation commission for information.

If your home has specially wired alarm equipment connected to the telephone line, ensure the installation of this G2PT-R24 does not disable your alarm equipment. If you have questions about what will disable alarm equipment, consult your telephone company or a qualified installer.

This equipment is not hearing aid compatible.

WARRANTY AND REPAIR SERVICE CENTER:

Personal Communication Systems, Inc. 301 N. Main Street, Suite 1800 Winston-Salem, NC 27101 800.555.0559

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