PhoneMaster®

Desktop Call Control

User's Guide

Version 2.4

Contents

1. Introduction

Welcome to PhoneMaster™ Desktop Call Control, the software that lets you manage your telephone activity from your PC. PhoneMaster handles outbound and incoming calls, and allows you to customize your phone to match the way *you* work.

1.1 PhoneMaster features

- Easy-to-use point-and-click interface allows you to manage your phone through your PC. There's no need to memorize complex telephone function keys and codes. PhoneMaster uses the standard Windows™ interface.

- Easy look up and dialing - use the customized phone directory to dial or transfer calls.

- Caller ID displays caller information before you answer the call so you can improve your productivity and be more responsive to callers.

- Automatic forwarding of calls to another number or to voice mail when your extension is busy or not answered.

- Visual voice mail message display on your PC to manage your messages.

- Speed dialing for frequently called numbers.

- Automatic Phone Book entry function to build a personal phone directory.

- "Do not disturb" for times when you cannot be interrupted by phone calls.

- Call Log database to track your external calls and provide valuable call history information - even when call was not picked up.

1.2 About this manual

This manual assumes that you are familiar with basic Windows 3.1, Windows 95 or Windows NT operations such as entering information in dialog boxes, clicking Cancel to cancel an operation, and clicking OK to complete an operation.

This manual contains information on how to:

- Install the PhoneMaster software

- Perform basic telephone functions

- Manage your calls

- Use PhoneMaster in a workgroup

- Customize PhoneMaster

- Use the optional VoiceMaster product to manage your voice mail.

> **Note:** This guide describes default settings provided by the manufacturer of the PhoneMaster application. If your system has been reconfigured or customized, this information may not be accurate. If there are discrepancies, please consult your NetPhone system administrator.

1.3 PhoneMaster Help

You can get information about PhoneMaster by clicking **Help** on the menu bar:

- **Contents** - Displays a listing of help subjects available.

- **Topic Search** - Allows you to enter a topic in the dialog box and go to that information.

- **About PhoneMaster** - Provides information about the version of the PhoneMaster application and components currently installed on your system.

To display context-sensitive help as you are using a dialog box function, click the box's **Help** button, or press the **F1** key.

PhoneMaster also has "Tool Tips" that display the function name and/or usage hints when you pass the cursor over an item.

2. PhoneMaster Quick Start

If you have used the previous version of this product, or if you are familiar with Windows-based applications, you can use PhoneMaster as soon as it is installed. The PhoneMaster software is easy to use and intuitive, however, you should take the time to read this guide and become familiar with all of its features.

2.1 Starting PhoneMaster

Note: If PhoneMaster is not installed on your PC, see *PhoneMaster Installation and Setup* on page 5.

1. If you are running Windows 95 or NT, click the **Start** button, point to Programs, and then click the PhoneMaster entry in the list of programs. If you are running Windows 3.1 double-click the PhoneMaster icon in your program folder.

2. When the PhoneMaster Login window appears, enter the requested information.

2.2 Dialing a call

To dial a call, double-click an entry in the Directory window on the right side of the PhoneMaster window, or click the Dialer button on the tool bar. When you use the Dialer, enter the numbers through your computer keypad, or by clicking the keypad representations. When you have entered the number, click Dial. You can also dial calls using your handset. See *Dialing calls* on page 11 for more information.

2.3 Answering a call

Calls to your extension appear in the Call List window, with the status message "incoming."

Once you have answered the phone by picking up your handset receiver you can:

- Place the call on hold by clicking the **Hold** button.

- Transfer the call to another extension by clicking an entry in the Workgroup or Company listing and then clicking the **Transfer** button.

- Send the caller to your voice mail by clicking the **My VMail** button.

- Send the call to another extension's voice mail by clicking a directory entry to select a destination mailbox and then clicking the **Mailbox** button.

- Hang up the receiver when done or click the **Hang Up** button. You can then click **Dialer** or double-click a listing entry to dial a new call.

When you have an incoming call while you are connected to another call, place the current call on hold, select the incoming call entry, and then click **Pick Up**. You can also double-click any call entry to pick up, thereby placing your other call on hold.

See *Answering calls* on page 12 for more information.

2.4 Playing a voice mail message

Note: This requires optional VoiceMaster software.

The **Voice Mail** button shows an envelope in the mailbox and a raised flag when you have messages in your inbox. Click the **Voice Mail** button to open the voice mail window (*Ctrl+O*). Your voice mail messages appear on two tabbed pages: Inbox and Saved Messages. Double-click a message to play it, or click once on the message to select it, then use the play control buttons. See *Using VoiceMaster Voice Mail* on page 35 for more information.

3. PhoneMaster Installation and Setup

3.1 System requirements

- 386/33 MHz or greater PC

- 3.5 inch disk drive

- 8 MB RAM

- 8 MB disk space

- Microsoft Windows 3.1, Windows 95 or Windows NT

3.2 Installing PhoneMaster

You can install PhoneMaster either from diskette, CD or from a network server. PhoneMaster installation takes approximately five minutes.

PhoneMaster Installation

PhoneMaster Desktop Call Control will generally be installed on all PC clients, as well as the server. The client must have mapped drives to the NetPhone server and VoiceMaster (if using VoiceMaster voice mail).

1. Insert NetPhone CD in the client PC to autorun the installation utility.

2. Select NetPhone Client for Windows 95 or NT4.0, then click Next.

3. You will be prompted through the installation process. The next windows displayed will prompt you for locations and names of the NetPhone Software Folder, Server System folder, and Program Icons folder. You may accept the defaults or modify these entries.

4. When complete, click Exit and remove the NetPhone CD.

Network installations:

PhoneMaster clients can be installed over the network if the NetPhone CD is mounted in a drive accessible to the client PC, or if the installation CD contents have been copied to an accessible directory (you may not use long directory names or spaces in the directory name).

Note: If you elect to install into a directory other than the default, select an eight character (or fewer)directory name.

3.2.1 To install from a network server

If your system has the PhoneMaster setup files available on the server accessible by your PC, you can install over the network (your system administrator will provide locations).

1. Map the NetPhone installation directory to a drive letter on your PC.

2. Double-click the file SETUP.EXE in the NetPhone installation directory. The installation process will then be the same as described in the previous sections.

3.3 Starting PhoneMaster

1. Click the Start button, then point to Programs.

2. Click **PhoneMaster**.

☎**Power User Hint:** You may create a desktop shortcut to PhoneMaster or add it to the Microsoft Office tool bar.

3.4 Entering login information

The first time you start PhoneMaster, the Login dialog box appears.

1. Select the server name from the list provided. Consult your system administrator about server choices.

2. Enter your username and password as assigned by your system administrator, and your telephone extension number. You can log in as a different extension by changing this information.

3. (Optional) Check the Save Password box so that PhoneMaster stored your login information. Then, you will not need to enter this information the next time you login to PhoneMaster.

4. Click OK.

If PhoneMaster displays the error message "Unable to Connect to Server" in the status bar at the bottom of the window, re-check the login information and try again by selecting Login from the File menu. If the problem persists, contact your system or network administrator.

3.5 Setting up directories

When PhoneMaster is first installed on your PC, blank default directories are displayed. Follow the steps below to install your own company's listing and begin building your Workgroup listing.

1. Select **Refresh Company Listing** from the **File** menu.

2. When the "Do you want to browse for the Company listing to copy?" dialog box appears, click Yes.

3. Select the file to use as your Company listing. Your system administrator will supply you with this information.

4. When asked if you want to overwrite the Company listing, click OK.

5.   When the message box "Update of Company listing completed." displays, click OK.

You now have an updated Company listing, and a Workgroup listing showing an entry for your extension. You can now add additional Workgroup listing entries. See *Modifying the Workgroup listing* on page 21 for details.

4. PhoneMaster Basics

4.1 PhoneMaster window
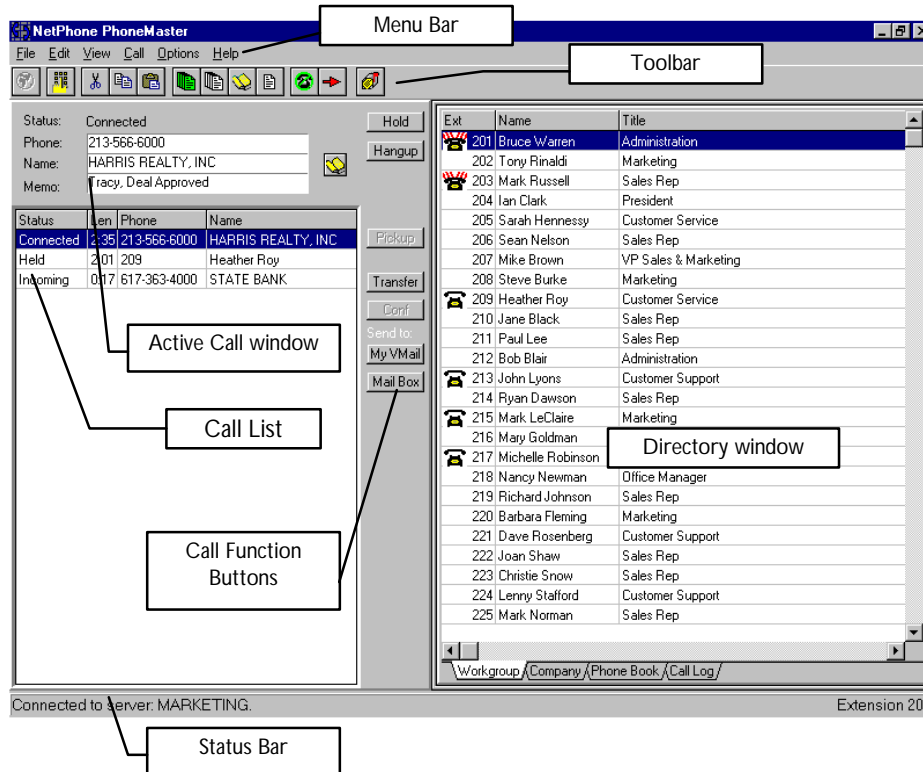
When you start PhoneMaster Desktop Call Control, the application window displays. The PhoneMaster window components are:

- **Menu Bar** at the top of the PhoneMaster window with pull down menus.

- **Tool Bar** with buttons to click for various PhoneMaster functions.

- **Active Call** window to display the currently active call.

- **Call List** window where calls are displayed.

- **Call Function Buttons** to perform actions on the selected call.

- **Directory** window with tabbed pages for Workgroup and Company listings, Phone Book and Call Log.

- **Status Bar** showing your extension number and the current program status, for example "Not Connected to Server," "Getting Server Status," or "Connected to Server."

4.1.1 PhoneMaster tool bar

The PhoneMaster tool bar contains icons you can click to perform tasks.
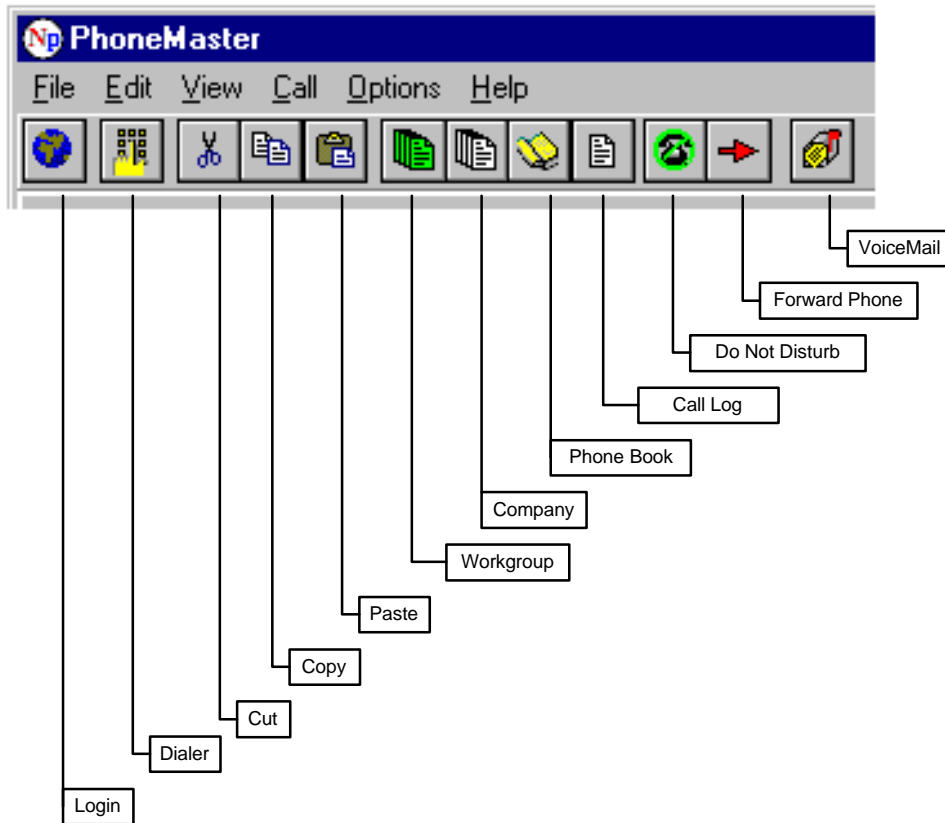
4.2 Dialing calls

There are several methods you can use to dial calls from the PhoneMaster application on your PC.

4.2.1 Dialing calls with the Dialer

1. Click the **Dialer** button on the tool bar to display the Dialer window
(*Ctrl-D*).

2. Enter a phone number by using the standard letter and numeric keys,
numeric keypad, or by clicking the key representations on the Dialer.
When using letter keys, PhoneMaster interprets them as the corresponding
phone keypad number, for example, A = 2.

3. Press Enter or click **Dial** to dial the call. If your telephone receiver is still
on its cradle, your phone will ring to signal that the call is being dialed.
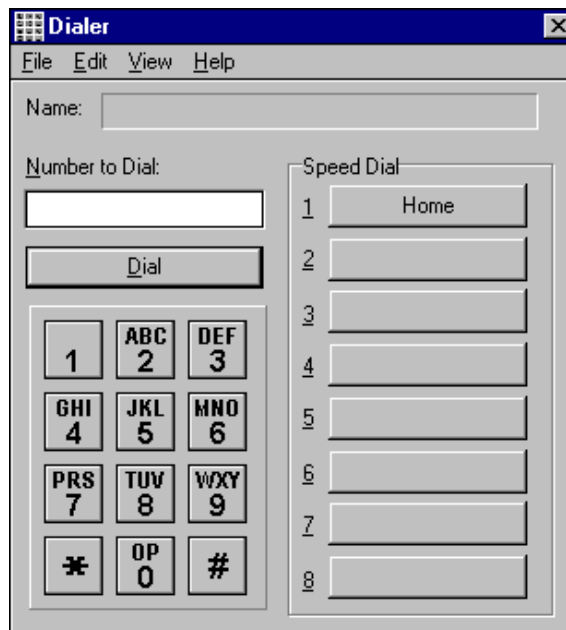
4.2.2 Dialing with speed dial entries

The Dialer's speed dialing function allows you to program up to eight speed dial buttons. You can store up to
24 in the speed dial directory. Click a speed dial button or double-click an entry in the speed dial list, and the

Dialer automatically dials the number associated with that name. See *Storing speed dial entries* on page 27 for more information.

4.2.3 Dialing from a directory listing

You can use a PhoneMaster directory as a dialing source. To do so, do one of the following:

- Double-click an entry in the Company or Workgroup listing to dial a call.

- Double-click an entry in the Phone Book or Call Log. PhoneMaster then displays the Dialer, with the number inserted. Click **Dial** or press Enter to dial the call.

If you do not wish to complete the call, replace the receiver in the cradle or click **Hang Up**.

4.2.4 Dialing from the Active Call window

Enter a number in the Phone field of the Active Call window, then press Enter.

☎**Power User Hint:** Use the edit functions to copy a phone number from a document, a mail message etc. and then paste into the phone field for dialing.

4.3 Answering calls

When your extension rings, the status field of the call entry reads "incoming." If you have no other active calls, lift your telephone receiver.

To answer a call while currently connected to another call do one of the following:

- Place connected call on hold, then select the incoming call entry and click **Pick Up** (*Ctrl+P*).

- Select the incoming call and click **Pick Up.** Doing so automatically places your connected call on hold.

- Double-click the incoming call to pick up and automatically place your connected call on hold.

If you are on a call and call waiting is enabled, you will hear the call waiting beep if you receive an incoming call. The incoming call appears in the Call window.

4.4 Hanging up a call

Click the **Hang Up** button or replace the telephone receiver on its cradle to end a call.

4.5 Placing a call on hold

Click the **Hold** button *(Ctrl+H)* to place the current call on hold. To reconnect with the call, select the entry and then click **Pick Up**, or double-click the entry. Doing so automatically places any other connected call on hold.

Note: If you hang up your telephone while you have a call on hold, it will ring and connect you to the held call when you pick up.

4.6 Call Parking

Call parking places a call in a "parking station". For example, a call comes in for someone who is not at their extension. The call is parked, and the person is paged. They can pick up the call from any extension by dialing the pickup sequence and entering the park station location.

To park a call:

1. Select the call.
2. Select Park from the PhoneMaster Call menu.
3. A confirmation message will display showing the parking station number. If unsuccessful, an error message will display.

To park a call using the handset:

1. Place call on hold.
2. Enter *30 (plus the two-digit station number). For example, to park a call In station #2, enter *3002.
3. Listen for confirmation tone (3 slow beeps). If you get a reorder tone, try parking in another station.

Note: Valid parking stations are 1 through 99.

To retrieve a parked call:

From the handset, enter *31 (plus the two-digit station number). For example, to retrieve a call parked In station #2, enter *3102.

☎**Power User Hint:** To see what calls you have parked, look in your Call Log. Parked calls are designated by "P" and the parking station is noted in the memo field.

5. Managing Your Calls with PhoneMaster

5.1 Transferring calls

PhoneMaster lets you make unannounced (blind) and announced transfers. A confirmation dialog will display before the call is transferred.

☎**Power User Hint:** You can disable the confirmation message with PhoneMaster's Preference settings. See page 23 for details.

5.1.1 Blind transfer

To transfer a call without announcing the caller to the transferee (blind transfer):

1. Select a destination extension by clicking an entry in the Company or Workgroup listing.
2. Click **Transfer**.
3. When the confirmation dialog appears, click OK to complete transfer.

5.1.2 Announced transfer

An announced transfer allows you to announce the caller to the transferee:

1. Place the caller on hold.
2. Dial a destination extension or select a destination in a directory. Double-clicking a transfer destination places the caller on hold and connects with the transfer destination.
3. When connected, announce the transfer.
4. Select the held call.
5. Click **Transfer**.
6. When the confirmation dialog appears, click OK to complete the transfer.

5.2 Sending calls to voice mail

5.2.1 Sending a call to your voice mail

To send a call directly to your voice mail without answering the call:

1. Click the call to select.

2. Click **Send to My VMail**. There will be a confirmation request before the caller is sent to your voice mail.

3. When the confirmation dialog appears, click OK.

5.2.2 Sending a call to another voice mailbox

To send a call to a selected voice mailbox:

1. Select a destination extension in the Company or Workgroup listing.

2. Click **Send to Mailbox**.

3. When the confirmation dialog appears, click OK.

5.3 Creating conference calls

To create a conference call, you must be connected to a call and have at least one other call on hold.

To conference in the held call:

1. Select the held call.

2. Click **Conference** (*Ctrl-Y*). The conferenced phone numbers appear in the Active Call window.

3. Add additional held calls to the conference by repeating this procedure.

To add new calls to the conference:

1. Place the conference on hold.

2. Dial and connect to a new call.

3. Select the held conference.

4. Click **Conference** (*Ctrl-Y*).

To exit a Conference:

1. Click **Hang Up**.

2. When the dialog box appears with options to hang up the entire conference, or remove only your extension from the conference, click the options you want, then click OK.

5.4 Do Not Disturb

Click the **Do Not Disturb** tool bar button to activate/deactivate Do Not Disturb for your extension. When Do Not Disturb is active, your incoming calls forward to voice mail or to a number specified in your setup. If no forwarding is set, callers will hear a busy signal.

5.5 **Forward Phone**

Click the **Forward Phone** tool bar button to activate/deactivate automatic forwarding of your calls. When activated, your incoming calls forward to voice mail or to the number specified in your setup.

See *Specifying forwarding settings* on page 28 for information about specifying forwarding numbers.

6. Using PhoneMaster in a Workgroup

6.1 Viewing PhoneMaster directories

Ext	Name	Title
201	Bruce Warren	Administration
202	Tony Rinaldi	Marketing
203	Mark Russell	Sales Rep
204	Ian Clark	President
205	Sarah Hennessy	Customer Service
206	Sean Nelson	Sales Rep
207	Mike Brown	VP Sales & Marketing
208	Steve Burke	Marketing
209	Heather Roy	Customer Service
210	Jane Black	Sales Rep
211	Paul Lee	Sales Rep
212	Bob Blair	Administration
213	John Lyons	Customer Support
214	Ryan Dawson	Sales Rep
215	Mark LeClaire	Marketing
216	Mary Goldman	Sales Rep
217	Michelle Robinson	Sales Rep
218	Nancy Newman	Office Manager
219	Richard Johnson	Sales Rep
220	Barbara Fleming	Marketing
221	Dave Rosenberg	Customer Support
222	Joan Shaw	Sales Rep
223	Christie Snow	Sales Rep
224	Lenny Stafford	Customer Support
225	Mark Norman	Sales Rep

Workgroup / Company / Phone Book / Call Log /

The PhoneMaster Directory window shows:

- The Company listing

- The Workgroup listing

- The Phone Book

- The Call Log

Click the tab at the bottom to go to a directory, or click the tool bar button for the directory you want to display.

You can reorder the columns of the directory by positioning the cursor in the heading of the column you wish to move, dragging it right or left as desired. You can change the column width by positioning the cursor directly on the column boundary in the heading section and dragging right or left.

See *Searching for and sorting directory entries* on page 26 for additional information.

6.1.1 Company listing

The Company listing shows the name and title/department for each extension listed in the company database You can use the Company listing to dial or transfer calls, however, the Company listing does not display the status of extensions.

See *Refreshing and replacing the Company listing* on page 24 for additional information.

6.1.2 Workgroup listing

The Workgroup listing is built from the Company listing. The Workgroup listing shows the extension number, name and department for each extension included in your Workgroup. If you want to use PhoneMaster to cover (monitor status and pick up calls) for another extension, that extension must be included in your Workgroup listing as well as in your Cover Group.

You can use the Workgroup listing as a source for dialing or for transferring calls.

The Workgroup directory displays the following icons in the extension field, showing the current activity status of an extension:

Off Hook - the extension is in use

Ringing - the extension is ringing

DND - extension has been set *Do Not Disturb*

6.1.3 Phone Book

The Phone Book listing is a personal phone directory that displays a phone number, name and memo field for each entry. You can use the Phone Book listing as a source for dialing or for transferring calls.

While dialing or connected to a call, click the **Add to Phone Book** button. to add the information to your Phone Book. You can also edit the Phone Book manually to add, remove, or modify entries.

Note: You must move the insertion point from the record in order for changes to take effect. If your call ends before you complete editing, the entry will not be made.

6.1.4 Call Log

PhoneMaster's Call Log maintains a record of the outside calls made to and from your extension (incoming calls are logged even if not answered). The Call Log entries list the following details:

- Incoming calls denoted by I, outgoing by O.

- The date, time and length of call.

- Phone number you called.

- The number that called your extension, if available from Caller ID.

- The name of the party being called. If unavailable from Caller ID, the phone number displays.

- Memo text if available through database lookup.

- The caller's extension

- The Caller ID phone if available from Caller ID mapping.

- The Caller ID name if available from Caller ID mapping.

To use the Call Log as a dialing source, double-click an entry. The Dialer appears with the phone calling information inserted, ready to dial the call.

To delete entries from the Call Log, click anywhere on the entry and press the Delete key. Note: Call Log entries can be deleted, but not edited.

6.1.5 Modifying the Workgroup listing
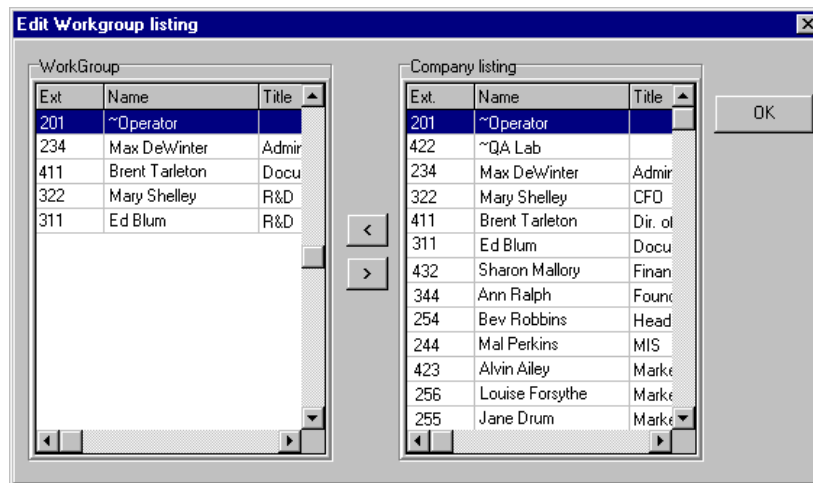
You can modify your Workgroup listing by deleting entries or copying entries from the Company listing.

To modify your Workgroup listing:

1. Select **Modify Workgroup** from the Edit menu.

    The Edit Workgroup window appears, showing your current Workgroup listing on the left, and the Company listing on the right.

2. To add a Workgroup listing entry, click a Company listing entry, then click the left arrow button. Alternatively, you can double-click the Company listing entry.

3. To delete an entry from your Workgroup listing, click the entry, then click the right arrow button. Alternatively, you can double-click the Workgroup entry.

4. When finished, click OK to save your changes and exit the window.

6.2 Picking up ringing calls on other extensions

PhoneMaster allows you to pick up any ringing extension within your Cover Group. To enable Cover Group pickup you must:

1. Determine the extensions to be part of your Cover Group. (See *Enabling Cover Groups* on page 30.)

2. Include the extension(s) you want to cover in your Workgroup listing. (See *Modifying the Workgroup listing* on page 21.)

3. Enable Call window display for extensions in your Cover Group through the File menu's Setup option. (See *Enabling Cover Groups* on page 30.)

When a covered extension is ringing, it appears in the Call List window. The status icon in the Workgroup listing is "ringing."

To pick up the call, do one of the following:

*   Select the call and click Pickup.

*   Double-click the call.

If the call is picked up by another extension, it no longer appears in your Call window.

Note: Double-clicking an entry in a directory listing dials a call. To pick up a call, you must double-click in the Call List window.

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7. Customizing PhoneMaster

You can customize many of the PhoneMaster features to meet your requirements. You can:

- Customize the PhoneMaster display.

- Update or replace your local copy of the Company listing.

- Search for and sort entries in a directory.

- Store speed dial entries.

- Specify forwarding settings.

- Enable call waiting.

- Enable Voice Mail.

- Enable Cover Groups, to pick up calls for other extensions in your workgroup.

- Identify callers with Caller ID.

7.1 Customizing the PhoneMaster display

To customize the way PhoneMaster displays on your PC, select **View** from the menu bar, then select options to:

- Hide/show status bar and tool bar.

- Show both the Call window and Directory window, the Directory window only, or the Call window only.

- Split windows to create a separate Call window, Directory window, and PhoneMaster menu/tool bar. You can move and size these windows independently. PhoneMaster remembers the position and sizes you have selected the next time you split the windows.

- Join windows to rejoin the PhoneMaster window elements.

To set preferences for PhoneMaster operation, select **Setup** from the **File** menu, click the **Preferences** tab, then select the options you want.

- **Bring program to the front on incoming calls** - Brings PhoneMaster to the front of other active windows when you have an incoming call.

- **Hide the Dialer after dialing** - The Dialer will close after dialing. If you do not check this option, the Dialer will remain open after dialing.

- **Sort calls by priority order** - Entries in the Call window will display in the following order: 1. Connected, 2. Calling, 3. Held. If this box is not checked, calls will display in order of appearance.

- **Enable confirmation on transfer** - Enables/disables display of transfer confirmation message when transferring calls to other extensions or voice mailboxes.

- **Enable Tool Tips** - Enables/disables display of hints when your cursor passes over areas of the PhoneMaster screen. When disabled, hints appear in the status bar at the bottom of the PhoneMaster window, instead of next to the item.

- Default extension number.

7.2 Refreshing and replacing the Company listing

The Refresh Company Listing option is used to copy the latest version of the file used as your Company listing, or to select a different file to be used.

1. Select **Refresh Company Listing** from the File menu.

2. When asked if you want to browse for the Company listing to copy, click No if you want to get the latest version of the file used. Click Yes if you want to select a different file, then navigate to the file you wish to use, then click OK..

3. When the message box appears stating "Update of Company listing completed," click OK.

You have now updated Company and Workgroup listings.

You can also use the Setup window's Directories page to select a different file to use as your Company listing file. To replace your local copy of the Company listing file:

1. Enter a path and file name in the space provided, or click Browse to search for a directory file.

2. Double-click a file name so that path/filename displays in the box provided.
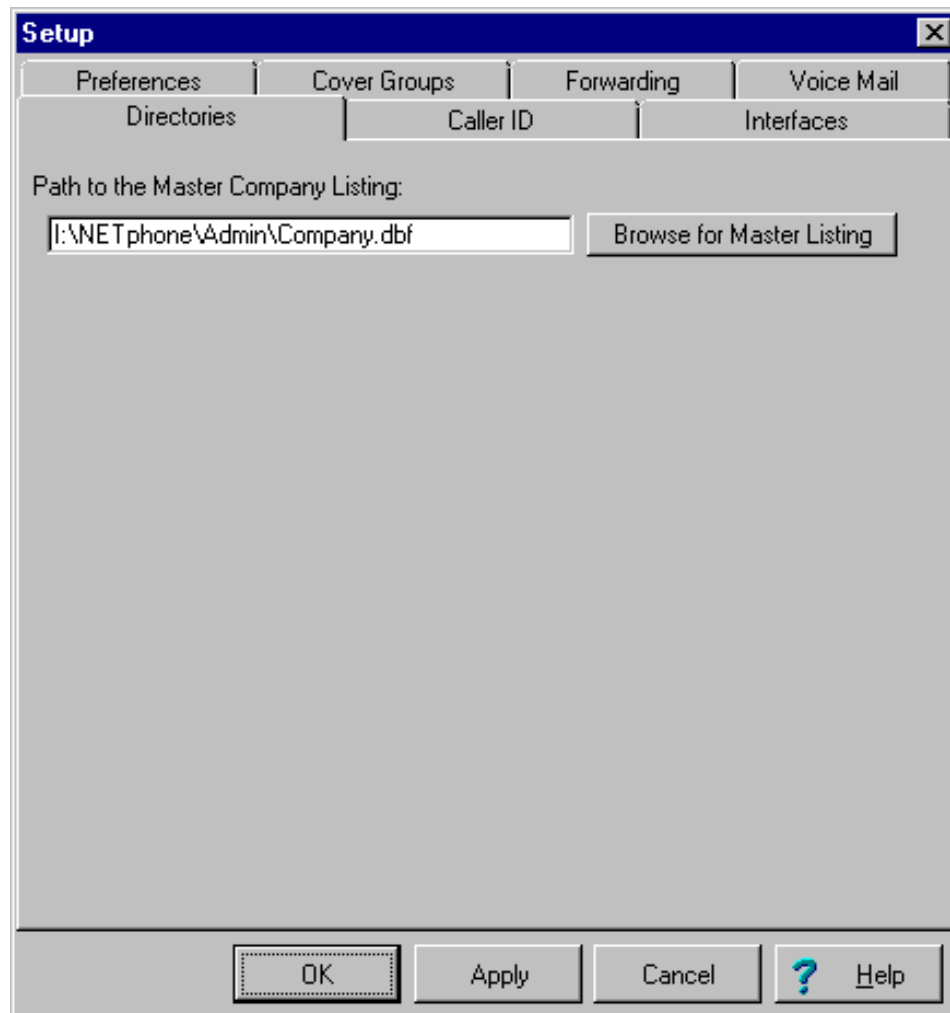
7.3 Searching for and sorting directory entries

While the cursor is in the Workgroup, Company, or Phone Book listing, press a letter key to select the first name beginning with that letter or its nearest match. You can also use the Edit menu's Find option (*Ctrl+F*) to search for a name or its nearest match.

You can sort entries in these directories by extension, name, or title. To sort entries, select **Sort** from the View menu, or click the right mouse button to display sort options.

Sort order for text fields is:

1. All entries beginning with an upper case character

2. All entries beginning with a lower case character

3. Entries beginning with non-alpha characters, such as punctuation symbols.

7.4 Storing speed dial entries

1. Click a blank speed dial button, or select **Speed Dial** from the Dialer's **View** menu to open the speed dial list.

2. Enter the name and phone number.

    *   For local numbers, you only need to enter the seven digits. For non-local numbers, you must include the area code.

    *   Hyphens are not required within the number sequences.

    *   You can tab through the series of boxes.

    *   You can use the **Edit** menu functions Cut, Copy, Paste, and Delete to modify entries.

3. When you finish editing, select **Dialer** from the window's **View** menu to return to the Dialer.

7.5 Specifying forwarding settings

PhoneMaster can automatically forward calls to your voice mail, to another extension, or to an outside number if your line is busy, not answered, or you do not wish to be disturbed.

> **Note:** If forwarding is set to an outside number, any restrictions on your phone for dialing outside numbers will apply to your call forwarding. For example, if you set your phone to forward to an area code you are prohibited from calling on your extension, calls will not forward.

1. Select **Setup** from the File menu.

2. Click the **Forwarding** tab to display the Forwarding page.

3. Set the forwarding options based on whether you have enabled the **Do Not Disturb** or **Forward Phone** buttons on the tool bar.

   - If the **Do Not Disturb** button is active, calls forward immediately to your voice mail or to a designated extension.

   - If the **Forward Phone** button is active, calls forward to another extension or phone number after a specified number of rings. Enter the extension or phone number in the box provided.

   - When neither of the above is active, you can forward all your calls to another extension or phone number, or to voice mail after a specified number of rings. Enter the extension or phone number in the box provided.

If you do not want to have calls forwarded when your phone is busy or unanswered, leave the forwarding number field blank.

> **Note:** When a forwarded caller reaches voice mail, the message will be left in the mailbox for the extension originally dialed, regardless of there they were forwarded.

7.6 Enabling call waiting

Call waiting provides a signal tone that lets you know when another call is trying to ring your extension while you are on another call.

The waiting call transfers to your voice mail or to another number if you do not pick up the call within the number of rings you have specified for forwarding. If no forwarding number is provided, you will continue to hear the call waiting tone until you answer or the caller hangs up.

To enable call waiting:

1. Select **Setup** from the File menu.
2. Click the **Forwarding** tab.
3. Click the "Enable call waiting" box.

If you do not enable call waiting, calls will forward according to your existing forwarding settings.

7.7 Enabling voice mail

You can enable/disable voice mail for your extension.

1. Select **Setup** from the File menu.
2. Click the **Voice Mail** tab to display the Voice Mail page
3. Check the "Enable voice mail" box.

When you enable voice mail, callers are sent to your voice mail according to the settings on the Forwarding page. If you do not have voice mail enabled, the Forward to Voice Mail choices in the forwarding dialog box are not available to you.

You can select a voice mailbox to use as your default for message display. Normally this is the mailbox for your own extension, but it may be for another extension, for example, if you monitor phone messages for someone else. You will need appropriate file access privileges on the server. Refer to the *NetPhone PBX Installation and Administration* guide for details.

You can also set the location of your voice mailbox directory on the NetPhone server. The path to the voice mail directory must be on a mapped drive, for example: F:\NETPHONE.

PhoneMaster allows you to use a voice mail application other than NetPhone's VoiceMaster. If you are using a voice mail application other than VoiceMaster, you need to check the option "Use non-NetPhone Voice Mail" and enter the command to execute the voice mail application in the box provided. Consult your NetPhone Administrator for details.

If you choose not to use voice mail, check the "Do not use voice mail" box.

7.8 Enabling Cover Groups

Cover Groups allow you to pick up calls for other extensions. An operator or receptionist may want to cover all extensions. Others usually cover only the members of their department or workgroup.

To enable Cover Groups:

1.   Select **Setup** from the File menu.

2.   Click the **Cover Groups** tab to display the Cover Groups page.

3.   Check one of the following Cover Group options:

   a) **Only cover this extension** - Enables call pickup only on your own extension (no Cover Group).

   b) **Cover all Workgroup extensions** - Makes all extensions in your Workgroup listing members of your Cover Group.

   c) **Cover the following Workgroup extensions** - Allows you to specify your Cover Group extensions by entering extension numbers (separate numbers with commas).

4.   Check one of the following notification options:

   a) **Ring this computer when this extension rings** - Enables PC audio alert when your extension is ringing.

   b) **Ring this computer when a covered phone rings** - Enables PC audio alert when an extension in your Cover Group is ringing.

5.   When **Only show calls to this extension in the call display area** is selected, only calls to your extension will be displayed. When not selected, all calls for your Cover Group will be displayed.

Note: You can only cover extensions included in your Workgroup listing. See Modifying the Workgroup listing on page 21 for more information.

7.9 Identifying callers with Caller ID

PhoneMaster Caller ID uses a calling party's phone number to look up information in a database or from a DDE (Dynamic Data Exchange) source. PhoneMaster then uses the information from these sources to fill in fields on the call entry when dialing or receiving a call.

To enable Caller ID:

1. Select **Setup** from the File menu.

2. Click the **Caller ID** tab to display the Caller ID page.

3. Check one of the following caller ID processing options:

    -   Look up information from a DDE source. Use the Interfaces page to enter appropriate settings.

    -   Do not use Caller ID to look up caller information.

    -   Look up caller information in a FoxPro or Dbase database.

To look up caller ID information in a database:

1. Enter the file name or click Browse to select a file.

2. Enter the field definition names in the external database that correspond to the PhoneMaster field names Telephone Number, Contact Name, and Company Name.

3. Click OK or Apply when done.

Application programs such as contact managers that are continually updated with new information can share this information with PhoneMaster for caller ID purposes. The other program must be running in the background and must support DDE.

If you have elected to look up Caller ID information from a DDE application, you need to enable the DDE connection and specify the application (DDE server) that will provide the Caller ID information. The DDE database will then populate the fields in the active call entry.

The field entries link PhoneMaster's call information fields to the corresponding field names in the DDE application. This information is specified on the Interfaces page.

1. Click on **Interfaces** tab to display the interfaces page.

2. Enter your application name in the DDE Service field

3. Enter the name of the database in the Topic field

4. Enter the names of the fields that will link to the PhoneMaster caller ID fields.

5. Refer to the DDE application's documentation for field name definitions for Phone, Name, Company and Memo.

To load the default field values for a specific DDE application, select the application name in the scroll box, and then click **Load**. If there is no listing of default values for your application, you need to enter them manually using the field names given in the application's documentation. To clear the fields above, select "None" in the scroll box, and then click **Load**.
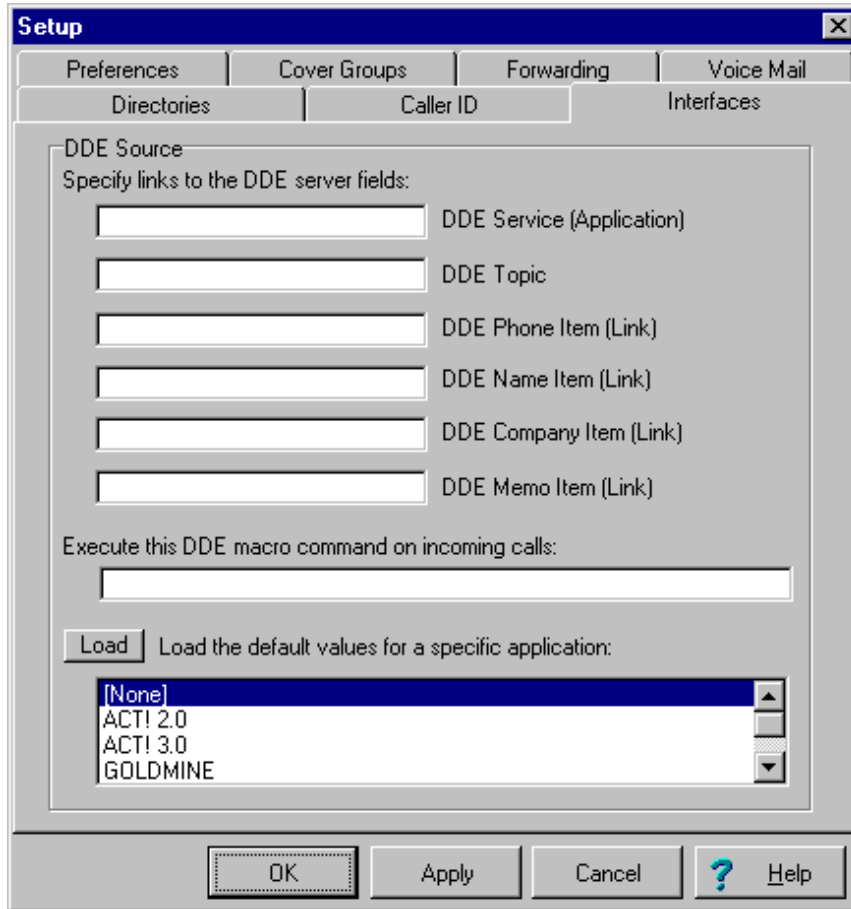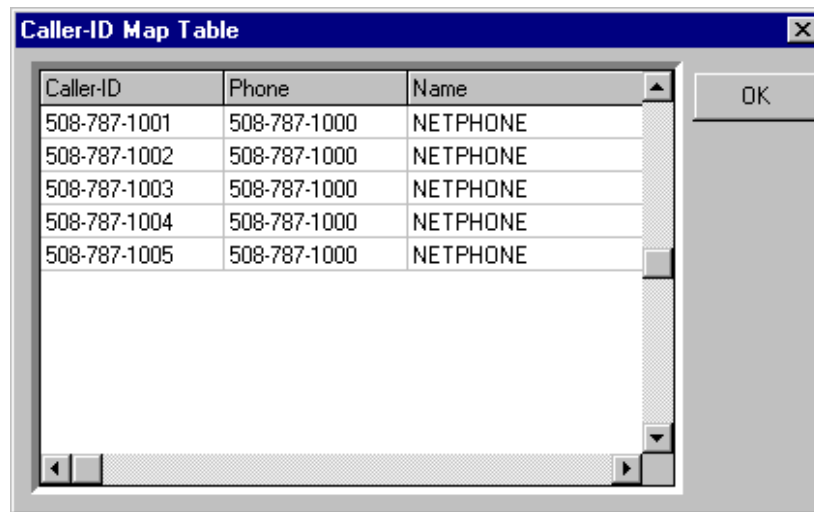
By enabling the "Execute DDE Macro Command on Incoming Calls" feature, the DDE interface uses the macro specified in the text box. You can use the macro loaded with a DDE application's default values, or enter a different macro in the box. When the macro is passed to the application, the following keyword substitutions are made:

- "FORMATTEDCALLERID" - The phone number formatted as
  XXX-XXX-XXXX (For example, 800-992-7433)

- "UNFORMATTEDCALLERID" - The phone number formatted as XXXXXXXXXX (For example, 8009927433)

7.10 Caller ID mapping

Caller ID mapping makes an automatic substitution when PhoneMaster sees the specified number through Caller ID. For example, if you receive calls from different phone numbers within the same company, you can map these numbers so that your return calls go to their main number.

1. Select **Caller-ID Map Table** from the Edit menu (*Ctrl-A*). The table window will open for editing.

2. Enter the actual phone number in the Caller-ID column.

3. Enter the corresponding number you wish reported in the Phone column.

4. When you are done editing, click OK.

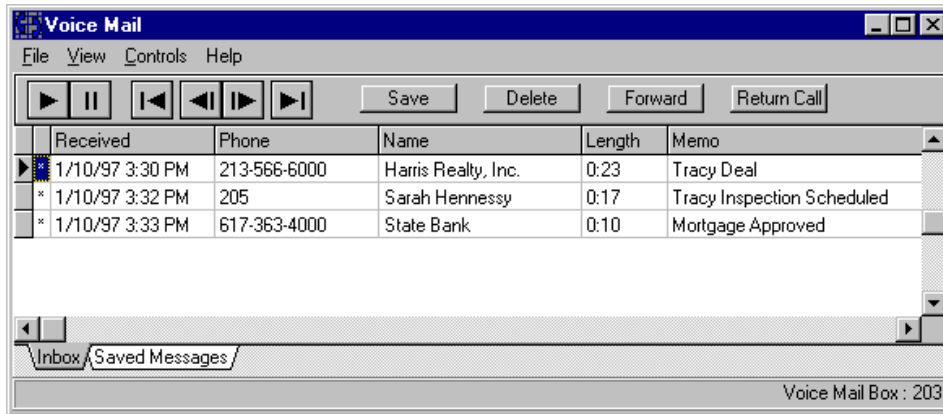| Caller-ID	Phone	Name
508-787-1001	508-787-1000	NETPHONE
508-787-1002	508-787-1000	NETPHONE
508-787-1003	508-787-1000	NETPHONE
508-787-1004	508-787-1000	NETPHONE
508-787-1005	508-787-1000	NETPHONE

8. Using VoiceMaster Voice Mail

VoiceMaster, an optional NetPhone product, is a full-functioned voice mail system. VoiceMaster allows callers to leave voice mail messages which you can then listen to, forward and reply to. The PhoneMaster tool bar's **Voice Mail** button shows an envelope in the mailbox and a raised red flag when you have new voice mail messages.

8.1 Voice mail window

Click the **Voice Mail** tool bar button *(Ctrl+O)* to open the voice mail message window. This window displays lists of your voice mail messages and function buttons for playing, saving or deleting them. Messages are listed in the order they are received, with oldest messages at the top of the list.

	Received	Phone	Name	Length	Memo
*	1/10/97 3:30 PM	213-566-6000	Harris Realty, Inc.	0:23	Tracy Deal
*	1/10/97 3:32 PM	205	Sarah Hennessy	0:17	Tracy Inspection Scheduled
*	1/10/97 3:33 PM	617-363-4000	State Bank	0:10	Mortgage Approved

Inbox / Saved Messages

Voice Mail Box : 203

Note: If you have a voice mail product other than NetPhone's VoiceMaster installed, it will launch via this button. Refer to that product's documentation for information.

The voice mail message lists are on tabbed pages; one for new messages (Inbox), and one for saved messages. Click the tabs to move between them. These lists show:

- Indicator for unread messages (*).

- The date and time the message was received.

- The length of the message in minutes:seconds.

- For external calls, the caller's phone number if Caller ID is enabled by your phone company; for internal calls, the extension number and name.

- An editable memo field where you can place a note about the call. Up to 30 characters will display. If the memo is longer than 30 characters scroll with arrow key to view the remainder of the memo.

8.2 Playing your voice mail messages

To listen to your voice mail messages, select a message by clicking the entry, then click the function buttons at the top of the voice mail window, or select the desired function from the VoiceMaster window's **Controls** menu.

> **Note:** If you answer a call while playing voice mail messages, voice mail message play stops automatically.

▶	**Play** - Select a message from the list, then click the **Play** button. Your phone will ring. Pick up the phone and listen to the message. Double-clicking a message puts it into play mode automatically.
‖	**Pause** - Click the **Pause** button to stop message play. You can resume play from where you stopped by clicking the **Play** button.
◀	**Replay Message** - Click the **Replay Message** button to replay the currently selected message from the beginning.
◀‖	**Rewind** - Click the **Rewind** button to "back up" five seconds to replay part of the currently playing message.
‖▶	**Forward** - Click the **Forward** button to "fast forward," skipping ahead five seconds in the currently playing message.
▶‖	**Play Next Message** - Click the **Play Next Message** button to play the next message after the currently selected message.

8.3 Managing your voice mail messages

Voice mail messages remain in the inbox until you move them to the saved messages page or delete them.

- Select a message by clicking anywhere on the message line.

- To save a message, select it, and then click the **Save** button. Doing so moves the message to the saved messages folder.

- To delete a message, select it, and then click the **Delete** button or press the Delete key. A confirmation dialog appears before the message is deleted.

8.4 Forwarding voice mail messages

You can forward a voice mail message to another mailbox or group of up to eight mailboxes. You can also voice annotate the forwarded message, adding your comments to the beginning of the message.

To forward a voice mail message:

1. Select a voice mail message by clicking anywhere on the message entry.

2. Select **Forward** from the File menu or click the **Forward** button.

3. If you wish to add an annotation, click **Record Annotation**. Your phone will ring if you haven't already lifted the receiver.

4. Speak into the receiver to record your annotation.

5. Click **Stop Recording** when the annotation message is complete.

6. Click **Review Annotation** to replay your annotation message. To change, click **Re-record Annotation** and record a new message.

7. Enter the voice mailbox you wish to forward to. You can enter a list of up to eight box numbers, separating each with a space or a comma.

8. Click the **Send** button to send the message

9. Click **Cancel** at any point before clicking **Send** if you want to cancel the forward.

8.5 Returning calls

VoiceMaster allows you to return a call to the number in a voice mail listing if Caller ID has supplied a number.

To return a call:

1. Select a voice mail message by clicking on it.

2. Select **Return Call** from the File menu or click the **Return Call** button.

    The PhoneMaster Dialer will be displayed with the number entered.

3. Click **Dial** or press Enter to dial the call.

8.6 Managing your voice mail from a telephone

VoiceMaster lets you access your voice mailbox from any push-button phone. Once you have entered VoiceMaster, you can:

- Press star (*) at any time for help hints.

- Press pound (#) during a prompt to end the prompt.

- Press pound (#) during message play to return to the main VoiceMaster menu.

8.6.1 Accessing your mailbox

To access your voice mailbox from an extension:

1. Press ***6**. You will then be prompted for a mailbox number.

2. Enter the mailbox number, followed by the pound (#) key. (If you are using your own extension, you can omit the mailbox number and just press the pound key.)

3. Enter your password when prompted, followed by the pound key (#).

    If you enter an incorrect password, the system will re-prompt you for up to two additional attempts. If you are still unsuccessful it will play a "goodbye" message and hang up.

To access your voice mailbox from an outside phone, for example from home or while traveling, do one of the following:

- Dial your number and connect to your extension. Press star (*) while your voice mail greeting is playing. The system will prompt you for your password. When you enter your password successfully, you can proceed.

- Dial your number and enter ***6** while the auto-attendant message is playing.

Once you enter your password, the voice mail system states whether or not you have messages. It then offers menu choices for playing messages or changing your voice mail greeting and password options.

- If you have new messages, VoiceMaster announces the number of new (unread) messages you have, and a menu of voice mail options.

- If you have no new messages, VoiceMaster announces the number of old (read) messages you have, and a menu of voice mail options.

- If you have no messages (new or old) the system responds "Your mailbox is empty," and then provides you with your voice mail options.

8.6.2 Playing messages

When you access your voice mailbox, VoiceMaster tells you how many new messages you have. If you have messages, VoiceMaster will present you with the following options:

- Press **1** to listen to your messages. The oldest new message will play first

- Press **2** to send a voice mail message.

- Press **3** to change mailbox options.

- Press **0** to dial another extension.

During message play you can:

- Press **7** to rewind five seconds.

- Press **8** to pause message play.

- Press **9** to skip forward five seconds.

After the message plays, you will be offered choices to:

- Press **1** to replay.

- Press **2** for next message.

- Press **3** to delete.

- Press **4** to forward.

- Press **5** to play the previous message.

8.6.3 Forwarding messages

You can forward a voice mail message to one or more mailboxes, with the option of adding an annotation message. VoiceMaster prompts for destination and annotation options.

1. After playing a message, press **4** to forward.

2. When prompted for a forwarding destination, enter one or more mailboxes to forward to. Separate individual mailboxes with a pound key. End the list with the pound key.

3. Press **3** to forward the message without an annotation, press **4** to cancel, or press **2** to add an annotation to the message (optional). When the annotation has been recorded, you can replace (press **1**), use (press **2**) or delete (press **3**) the annotation.

4. When the annotation is complete, press **3** to forward the message, or press **4** to cancel.

8.6.4 Recording a voice mail greeting

Access your voice mail box and select the greeting option from VoiceMaster's main menu

If you do not have a greeting, you will hear options to record a greeting. If you already have a greeting you will hear options to keep or replace the current greeting.

- Press **1** to hear your current voice mail greeting.

- Press **2** to keep your current voice mail greeting.

- Press **3** to replace your current voice mail greeting

If you choose to replace your greeting, VoiceMaster prompts you to record a greeting then offers choices to:

- Press **1** to hear your new greeting

- Press **2** to install your new greeting

- Press **3** to erase your new greeting.

Note: The last voice mail greeting "installed" is the one that will pay when callers reach your voice mail.

8.6.5 Changing your voice mail password

1. Press **2** to select the change password option from VoiceMaster's main menu.

2. When VoiceMaster prompts you for a new password, enter a password from 0 to 9 characters long, followed by the pound (#) key.

When you are prompted to confirm your new password, re-enter the new password. If it matches, your new password will be installed.

Note: The default password is 0 characters (no password). NetPhone recommends installing a new password before using voice mail.

9. Phone Keypad Commands

You can perform many NetPhone operations through the keypad of the touch-tone phone for your extension. This may be required if you do not have access to a PC, or for times when you find using it inconvenient. You may also wish to keep the NetPhone Keypad Codes reference card by your extension for quick lookup, or press star (*) on your handset for audio Help.

9.1 Dialing from your extension

Dialing calls with NetPhone is similar to dialing with most Centrex or other business phone systems. The dialing instructions described below are the defaults supplied with the NetPhone system. You may find differences if your system has been reconfigured by your system administrator.

To dial...	Do this...
An outside local call	Press **9,** then the seven digits of the phone number.
An outside long distance call	Press **9 + 1**, then the ten digits of the phone number (provided your extension has privilege to dial toll calls).
Another extension	Enter the digits of the extension number
The internal operator	Press **0**.
911 emergency services	Press **911 or 9**+**911.**
Phone company directory assistance	Press **9**+ appropriate directory assistance number.

VoiceMaster Express (Leave a message at a Voice Mailbox)

You can leave a message at a mailbox from an extension by pressing *****7**, the three digit extension, then the pound key (#). You will be prompted to leave a message. When you have completed your message, you can hang up, or press the pound key to leave additional voice mail messages.

You can also press "0" to transfer to another extension.

9.2 Managing calls

9.2.1 Picking up a ringing call on another extension

NetPhone allows you to pick up any ringing extension within your Pickup Group by pressing *5. A Pickup Group is any set of phone extensions that form part of a group, as assigned by the system administrator. Usually all extensions within one office or department comprise a Pickup Group.

> **Note**: A Pickup Group set by the system administrator is not the same as the Cover Group set through PhoneMaster. Members of the Pickup Group can pick up each other's ringing calls using the handset. The two groups do not necessarily have the same members.

9.2.2 Placing a call on hold

Depressing and quickly releasing the switch hook (in less than one second) is called a "Flash." Flashing places the current call on hold and gives an acknowledge dial tone. You can then transfer or conference the call. If your phone has a flash button, you may use that in place of the switch hook.

9.2.3 Picking up a held call

You can pick up a held call by pressing *4 (pickup **H**eld). If you have a held call, flash to reconnect. If you have more than one held call, the last call placed on hold is picked up first.

9.2.4 Parking Calls

1. Place call on hold.

2. Enter *30 (plus the two-digit station number). For example, to park a call In station #2, enter *3002.

3. Listen for confirmation tone (3 slow beeps). If you get a reorder tone, try parking in another station.

Note: Valid parking stations are 1 through 99.

To retrieve a parked call:

From the handset, enter *31 (plus the two-digit station number). For example, to retrieve a call parked In station #2, enter *3102.

9.2.5 Transferring a call (announced transfer)

You can make an announced transfer by doing the following:

1. Flash to place the call on hold.

2. Dial the transferee.

3. When connection is made, announce the caller to transferee.

4. Place transferee on hold.

5. Press ***8** to connect the caller.

9.2.6 Transferring a call (blind transfer)

You can make a blind transfer by doing the following:

1. Flash to place the call on hold.

2. Dial the transferee and then hang up within five seconds.

If you do not complete the transfer within five seconds, NetPhone assumes you have hung up on the number you are transferring to. The call will ring back on your extension.

9.2.7 Creating a conference call

To create a conference, press ***2** (**C**onference). This creates a conference of all held calls plus yourself.

9.2.8 Accessing your voice mailbox

1. Press ***6**. You will then be prompted for a mailbox number.

2. Enter the mailbox number, followed by the pound (#) key. If you are using your own extension, you can omit the mailbox number and just press the pound key.

3. Enter your password when prompted, followed by the pound key (#).

9.2.9 Forwarding calls

NetPhone allows you to set call forwarding to other extensions or to an outside number when your line is busy, not answered, or when you do not want to be disturbed. Note that when you set forwarding to an outside number, any restrictions on your phone at time of forwarding for dialing outside numbers will apply to your call forward For example, if you set your phone to forward to an area code you are not permitted to call with your extension, your calls will not forward.

> **Note:** If you have enabled PhoneMaster's "Restore Forwarding on Startup" option, forwarding set via the keypad will be overwritten by PhoneMaster's on restart.

Forward if Busy

You can set your extension so that calls will forward to another extension or outside number if your line is busy.

To set Forward if Busy press ***92** plus the digits of the number calls will forward to. Enter ***88** in place of the extension number to forward calls to voice mail. To cancel Forward if Busy press ***92#**.

Forward Immediately

To set your extension so that calls will Forward Immediately to another number press ***94** plus the digits of the number calls will forward to. Enter ***88** in place of the extension number to forward calls to voice mail. To cancel Forward Immediately press ***94#.**

Forward if No Answer

You can set your extension so that calls will forward if your extension does not answer.To set your extension to Forward if No Answer press ***96** plus the digits of the number calls will forward to. Enter ***88** in place of the extension number to forward calls to voice mail. To cancel Forward if No Answer press ***96#**.

10. Appendix A - Troubleshooting

Problem	Assessment and possible solutions
PhoneMaster icon not visible or not on program list.	PhoneMaster software is not installed or in a different folder. Consult your system administrator or search for PhoneMaster in other folders.
"Server Not Connected" message displays.	The server is not connected. Repeat the PhoneMaster login procedure. If unsuccessful, consult your NetPhone system administrator.
Unable to access voice messages.	Your system is unable to access the voice mail server that contains the voice mail message, or voice mail is not enabled on the server. Make sure that you have correctly mapped the drive with voice mailbox folders.
"No NetPhone Servers Found" message appears.	PhoneMaster is unable to locate a NetPhone server on the network. Verify that you are still connected to the network and that the NetPhone server is running.
Cannot dial outside number(s).	Your extension may have a class of service restriction. Consult your system administrator.
Cannot transfer call successfully using phone keypad.	You may be taking longer than five seconds to hang up after dialing the new party. When the call rings back to you, create a conference with the new party and then hang up.
Voice Mail directory not found.	The path to the server's voice mail folder may be incorrect. Check the Voice Mail page under **Setup** and make sure the server directory is mapped to a drive letter on your computer and that the path is correct, for example: F:\NETPHONE
Forwarding enabled, but calls not transferring to outside number.	Your extension may have service restrictions, such as "no long distance calling." Set forwards in accordance with your class of service.

11. Appendix B - Glossary

Call Log - The Call Log keeps track of external calls to and from your extension. You can use the Call Log as a dialing source.

Call mapping - Call mapping for Caller ID allows you to specify what number will be reported to Caller ID when a specified number is seen.

Call Park - Parking a call places it on hold in a "parking station". The call can be retrieved (unparked) from any phone, by entering *31 (plus the two-digit station number).

Call waiting - Call waiting provides a signal if you are already on a call and another call rings on your extension. When a second call is announced, you can place the current call on hold and pick up the second call, or you can ignore the second call.

Call window - The Call window is PhoneMaster's display of current calling activity for the user's extension, and for any other members of the user's Cover Group.

Caller ID - Caller ID displays the number of the caller on the call entry. If you are looking up caller ID information from a database, additional information may be displayed. Callers may be able to block Caller ID, in which case you will not see this information.

Class of service - The class of service designates the selection of features and calling privileges available to a particular line or extension. All members of a class have the same privileges.

Company listing - The directory of names and phone numbers for your organization. This is a centrally maintained database. Users have local copies on their PC. Select Refresh Company Listing from the File menu to ensure you have an up to date copy.

Conference call - Three or more active calls connected so that conversation can be held among all the parties.

Cover Group - A Cover Group is any set of phone extensions forming part of a group, as selected by the user through the File menu's **Setup** option.

DDE (Dynamic Data Exchange) - DDE applications are shared applications that allow information to be updated continuously by other users and/or applications. Contact managers are usually DDE applications.

Flash - To depress and quickly (in less than one second) release the telephone's switch hook.

Forward - To direct your calls to another extension or voice mail if your phone is busy or not answered.

Hold - To keep a caller connected while you perform another operation or handle another call. You can then take the call off hold and continue with that caller.

Menu bar - The PhoneMaster menu bar (at the top of the application window) has pulldown lists of commands you can select to perform PhoneMaster functions.

Password - A sequence of characters entered to allow access into computer or phone application, such as voice mail.

PBX (Private Branch Exchange) - A PBX is a private version of the phone company's switching mechanisms, allowing internal phone operations (transferring, dialing other extensions) as well as connecting to the outside phone network. The PBX is owned by the company using it, rather than the phone company.

Phone Book - The Phone Book listing is a personalized directory based on your calls. Click the "Add to Phone Book" button while a call is connected to add the information to your Phone Book.

Pickup Group - A Pickup Group is a set of extensions forming part of a group. Members of the group can pick up calls ringing on the other extensions by pressing *5 on the phone keypad. This group is set by the system administrator, as opposed to *Cover Groups*, which can be set by the user.

Server - A computer on the network that handles operations for all other users, for functions such as networking or printing.

Shortcut keys - A keystroke sequence to perform a function, for example, Ctrl+O to access voice mail.

Speed dial - A directory of numbers entered into the PhoneMaster Dialer, so that they can be dialed by clicking the entry. Usually these are frequently called or complex number sequences.

Status bar - The status bar appears at the bottom of the PhoneMaster window and displays current status of the PhoneMaster server, for example, "Connected," "Not Connected," "Getting Server Status."

System administrator - The person designated as responsible for administering the PhoneMaster system for an organization.

Tool bar - The PhoneMaster tool bar displays a row of icon buttons that you can click to perform common operations on a selected call in the call window, to enable/disable *Do Not Disturb* or *Forward Phone*, or to access *Voice Mail* for your extension.

Tool Tips - Helpful messages that display as you pass the cursor over a screen option or area. You can enable/disable Tool Tip hint display through the Preferences page under **Setup** from the File menu.

Transfer - Moves a caller from your extension to another number. Transfers can be announced to the party at the new destination, or can be blind, where the caller is immediately connected to the new number.

Username - The name associated with your computer accounts, usually assigned by your system manager.

Voice mail - Allows callers to leave spoken messages at your extension in a "voice mailbox" for you to retrieve at your convenience.

Workgroup - The Workgroup listing allows you to monitor the status of the other phones of workgroup members.

12. Appendix C - Keystroke Shortcuts

PhoneMaster offers keystroke shortcuts for many functions. The shortcut appear next to the menu entry for the function.

Function	Keystroke Sequence
Dial	Ctrl+D
Pickup	Ctrl+P
Hold	Ctrl+H
Conference	Ctrl+Y
Transfer	Ctrl+T
Hang up	Ctrl+G
Open Voice Mail Window	Ctrl+O
Send Call to Voice Mail	Ctrl+S
Send Call to Selected Voice Mail	Ctrl+M
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Find name	Ctrl+F
Set/Disable Do Not Disturb	Ctrl+N
Open Caller-ID map table	Ctrl+A
Modify Workgroup	Ctrl+W

13. Appendix D - Software License and Warranty Information

NetPhone, Inc. Limited Software Warranty and License Agreement

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