



PhoneTree 2500 and 3500 series

Network Client Guide

Operating Instructions and Install Guide



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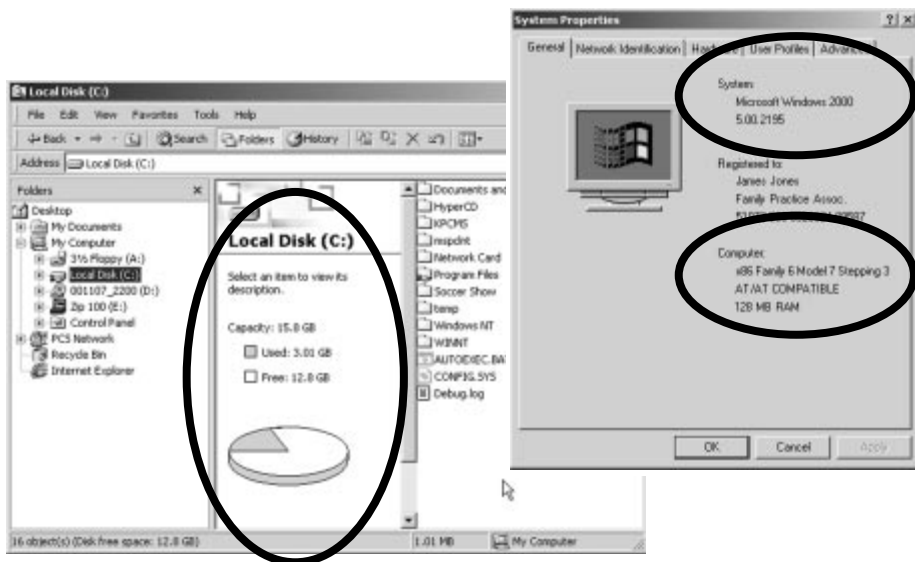
Installation: Verify Your PC Compatibility

Congratulations on your purchase of the PhoneTree Network Client! This manual will guide you through the installation and setup of the PhoneTree Network Client on your system. If you need assistance with the installation, talk to the PhoneTree Network Administrator in your office or refer to the PhoneTree 2500/3500 User's Manual.

Step One: Verify Your PC Compatibility

1. Operating System

Your PC must have Microsoft Windows 95, 98, 2000, ME or XP as the operating system. PhoneTree is not compatible with Windows 3.1 or NT.



2. PC Resources: PhoneTree client

- 32 MB RAM (64 MB recommended)
- CD ROM drive
- Color monitor
- sound card
- microphone
- speakers

3. Network Configuration

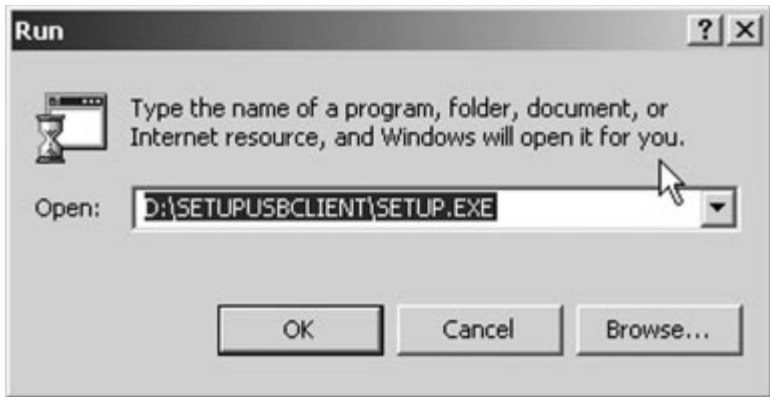
The PC that will be hosting PhoneTree must be configured and installed on the office network, and the computer where you will be installing the PhoneTree Client must be configured and installed on the same network (but on a different computer).

Installation: Install the Software

Step Two: Install the Software

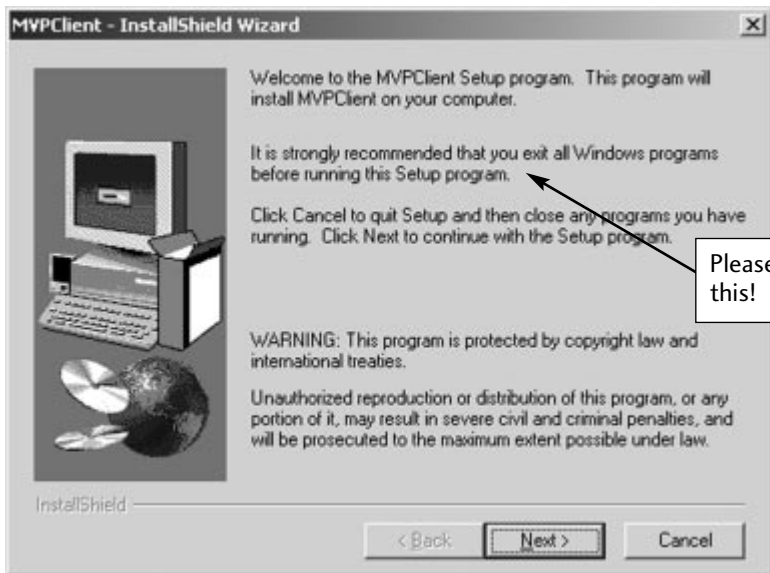
1. Insert the CD

Insert the CD in your drive. Choose **Start** -> **Run** -> **Browse...** -> **SETUPUSBCLIENT\Setup.exe** (look for this file on the CD) -> click **Open** -> click **OK**. The installation should then begin.



2. Choose the Default Settings

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



Installation: Install the Software, continued

3. Finish Installation

When asked, click the **Finish** button. Do not start the PhoneTree program at this time. Close the Client window.



4. Check for Icon on Desktop

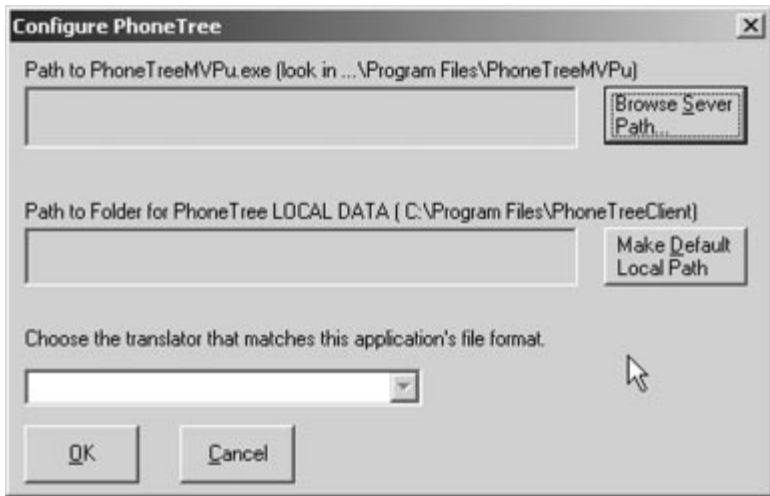
Now you should have a PhoneTree Client icon on your desktop (shown at right). You are now ready to go on to **Step Three: Configure Your Client**.



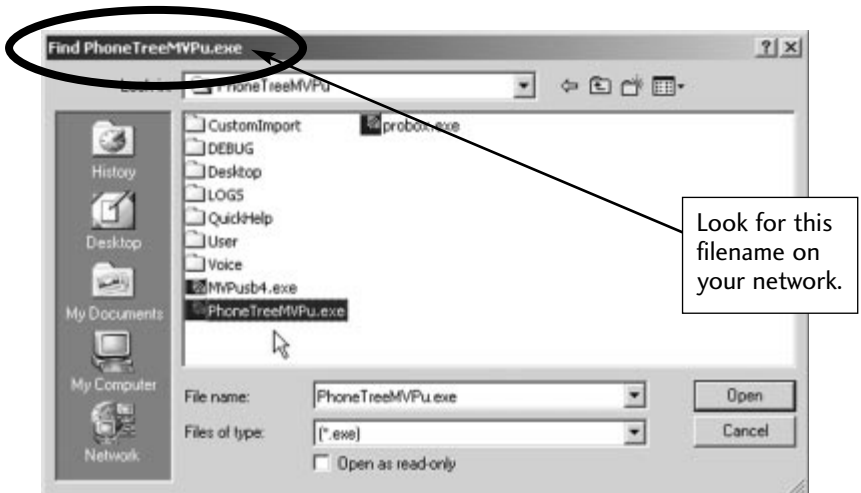
Installation: Configure Your Client

Step Three: Configure Your Client

1. Double-click on the **PhoneTree Client** icon on your desktop. You will be prompted to configure your client. The screen below will come up. You need to do three things: tell the Client where the PhoneTree Server is located on the network, create a default local path for all your local calling data, and tell the Client which translator to use when sending calling data to the PhoneTree Server.

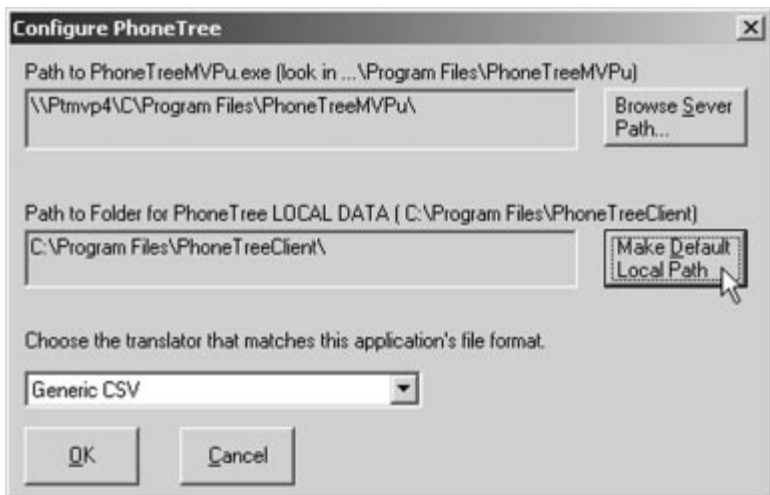


2. To tell the PhoneTree Client software where the Server software resides, click the **Browse Server Path** button. Navigate to the location of the PhoneTree software over your computer network. When you've found it, click **Open**.



Installation: Configure Your Client, continued

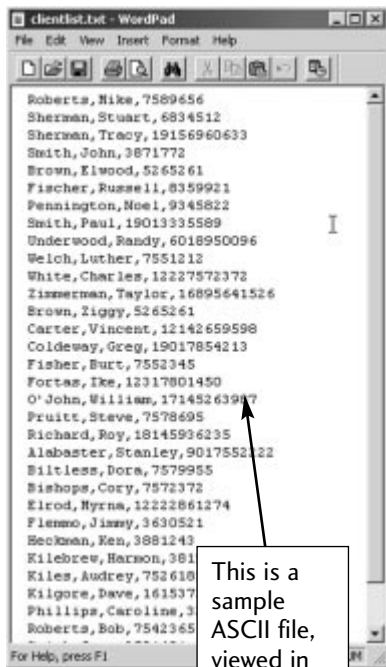
- To create a default folder where all your calling preferences and other data will be kept, click the **Make Default Local Path** button. A folder will be created on your hard drive in the location shown, and this is where all data that is generated by the PhoneTree Network Client software will be stored.



- Now you need to choose a translator for your calling data. This translator will be used if you generate a calling list locally, on your own computer, and you want to send it to PhoneTree to use when starting a call session.

Generic CSV will translate any comma-delimited text (ASCII) file that follows the format at right (last name, first name, phone)—use this unless you commonly use a member database program and its translator appears in the drop-down menu.

- Click **OK**. You are now ready to start calling! Turn to the next section, **Daily Operation**.



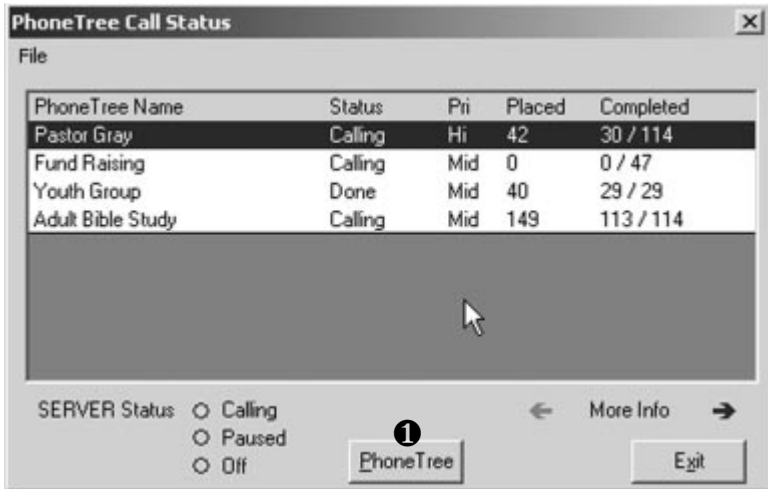
This is a sample ASCII file, viewed in WordPad.

Initial Setups: Call Options

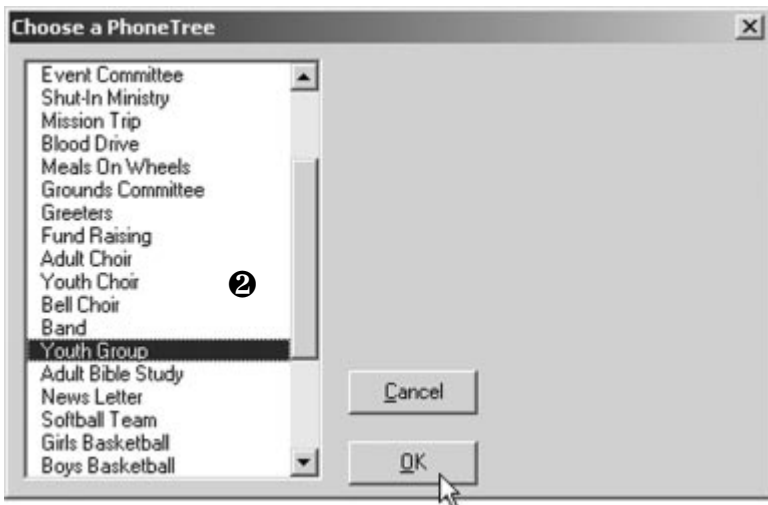
Call Options

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

- 1 Click on the **PhoneTree** button.

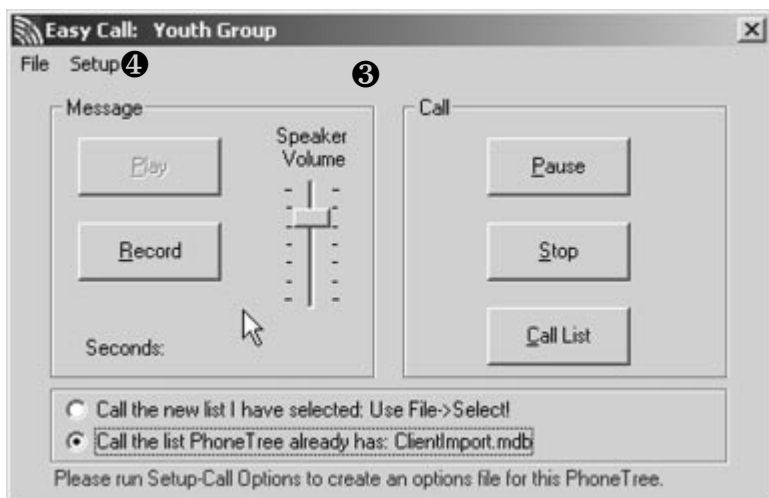


- 2 Choose the PhoneTree you would like to access from the menu, then click the OK button. PhoneTrees protected by a password will be marked with an asterisk (*).

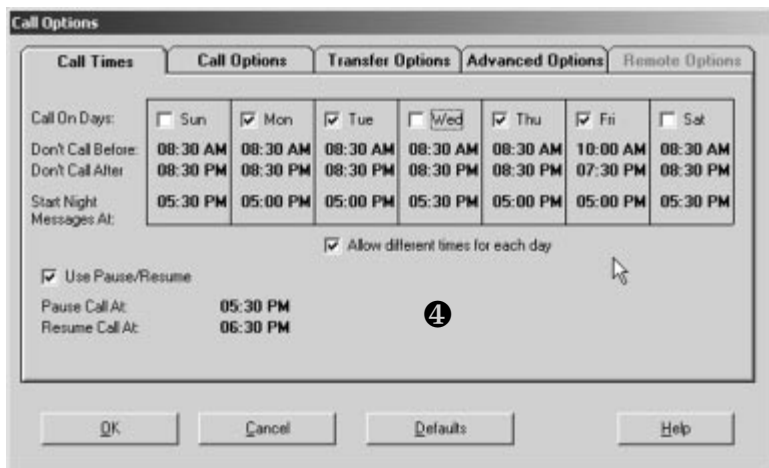


Initial Setups: Call Options, continued

③ The **Easy Call** dialog will appear. From the Setup menu, choose **Call Options**.



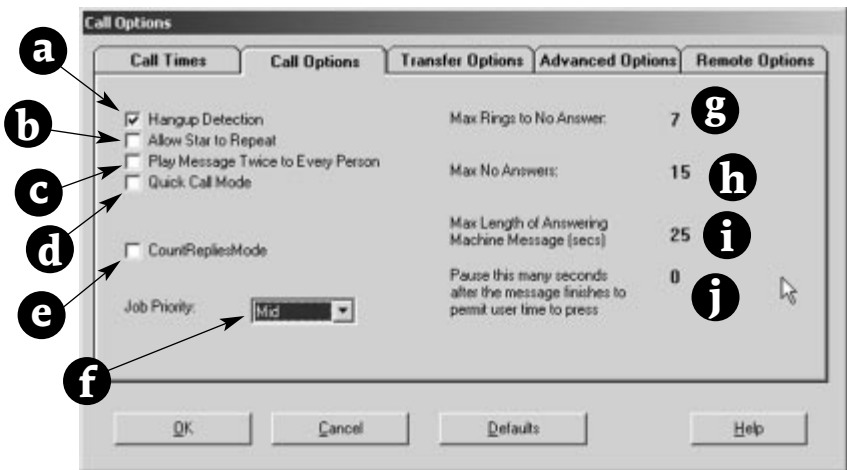
④ The **Call Times** tab will be active. Choose days to call on by clicking on the box(es) next to the day. Change the **Don't Call Before** and the **Don't Call After** times by clicking on them—a **Set Time** box will appear, allowing you to make changes. There is a checkbox called **Allow Different 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.



Initial Setups: Call Options, continued

5 Click on the **Call Options** tab.

- Selecting the “**Hangup Detect**” option means that if the called party hangs up the phone early, PhoneTree will note this in the status report. [Recommended setting: **ON**]
- “**Star to Repeat**” gives the listener the option to repeat the message if they wish 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 Star). [Recommended setting: **ON**]
- “**Play Message 2 Times**” means that each time PhoneTree delivers a message, it will play the same message twice. This option significantly lengthens the time it takes to finish a call job. [Recommended: **OFF**]



- “**Quick Call Mode**” speeds up message delivery by calling only people who are at home. During the first round of calling, PhoneTree will only ring 3 times at a number before hanging up and going to the next number. The result is that answering machines, which traditionally pick up after the 4th ring, will be called last. During subsequent rounds of calling, PhoneTree will revert to its normal calling setups. [Recommended setting: **OFF**]
- “**Count Replies Mode**” tells PhoneTree to stop calling after the desired number of people press 9 in response to your question. For example: “Hi, this is Steve. I’m calling to get three volunteers to help paint the gym. If you can help, please press 9 now. --pause-- Thanks!” If this option is selected, a **Replies Needed** number appears (default: 5) where you can change the number of “yes” (9) replies you want

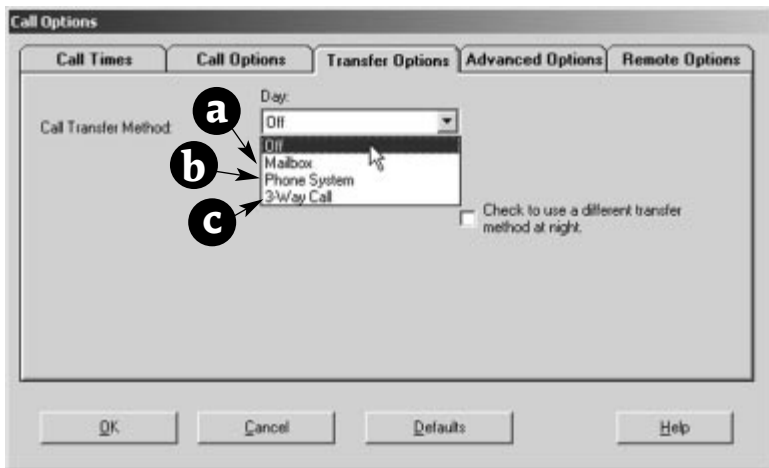
Initial Setups: Call Options, continued

from 1 to 1000. This mode only recognizes 9 when dialed on touch-tone phones. This feature is especially good for seeking a limited number of volunteers, because PhoneTree will stop calling after the number of desired 9 replies are received. [Recommended setting: **OFF**]

- f. **“Job Priority”** enables you to specify whether your job is Low, Medium (Mid), or High priority. Use Medium (Mid) for most call jobs, High for when a job is urgent and needs to be completed quickly, and Low for call jobs that aren’t as time-sensitive as most. If you select High, your call job will precede all other current jobs and will be completed first. [Recommended setting: **Mid**]
- g. **“Max Rings to No Answer”** means the number of rings before PhoneTree considers the call to be Not Answered. Select a value between 3 and 8, keeping in mind that most answering machines will pick up after the 4th ring. [Recommended setting: **7**]
- h. **“Max No Answers”** can be set from 1 to 15. PhoneTree will call a number back this many times if it gets a busy signal or a No Answer. PhoneTree automatically spreads these attempts out over the day. [Recommended setting: **15**]
- i. **“Max Length of Answering Machine Message (secs)”** can be set between 25 and 80 seconds. Change this only if you see “Ans Mach OGM too long” in the Status report. [Recommended setting: **25**]
- j. **“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 member has enough time to press the Star key. [Recommended setting: **0**, when using Star to Repeat: **2**]

Initial Setups: Call Options, continued

- ⑥ Click on the **Transfer Options** tab. There are four options in the drop-down menu, Off, a) Mailbox, b) Phone System and c) 3-Way Call. Unless this is set to Off, any time your members press 0 during a PhoneTree message they will be transferred to the location you specify here.
- a. **Mailbox:** Choosing this option allows your members to leave you a voice mail message, just as if you had an answering machine hooked up to PhoneTree. You will need to record an OGM (outgoing message) that will be played after a member presses 0. To do this, click OK on this screen and read the instructions on page 44 of the PhoneTree

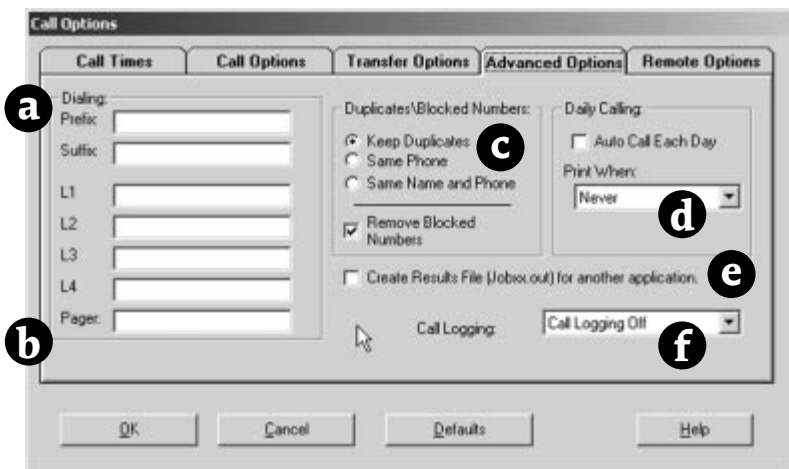


User's Manual. Don't forget to tell your members *in your PhoneTree message* to press 0 if they want to leave a message.

- b. **Phone System** allows your members to be transferred to a live operator in your office. You will be prompted to specify the extension to where the call will be transferred, and also to specify a hook flash delay (leave at 3 unless you experience problems). This option requires that PhoneTree be connected to an analog extension on your phone system.
- c. Choose the **3-Way Calling** option if you subscribe to 3-Way Calling through the phone company and you'd like your members to be able to be transferred to another number. You will need to specify the number to where the member will be transferred, and also to specify a hook flash delay (leave at 3 unless you experience problems).
- ⑦ Click on the **Advanced Options** tab. In general, we recommend you not change these options unless directed to do so by PhoneTree technical support. However, you may need to adjust these settings from time to time.

Initial Setups: Call Options, continued

- 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 *only* talk to people who are at home (i.e., to never leave a message on an answering machine). You would put an “A” in the Suffix box (which tells PhoneTree to hang up when it detects an answering machine). Remember, any Prefixes, Suffixes and Library numbers you type here will be **in addition to** any others typed on the Configure Phone Lines dialog on the Administrator Desktop of the host machine (which are system-wide).



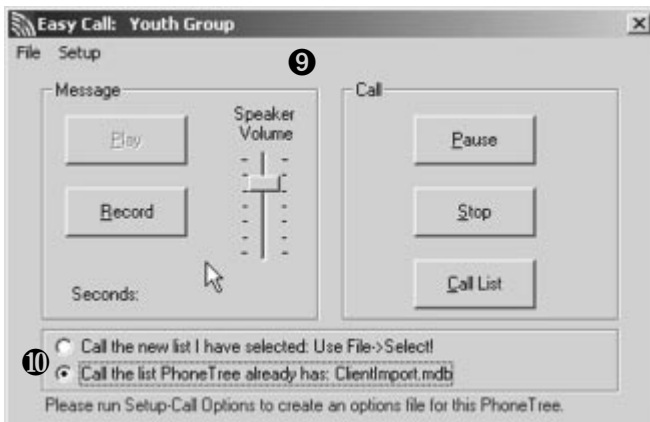
- b. If this PhoneTree will be calling any pager numbers, type in the callback number here in the **Pager** box, and be sure to put a “C” in your list after any pager phone number (i.e. 722-5992C). Doing this will ensure that PhoneTree will leave your callback number on the pagers it calls.
- c. **Duplicates/Blocked Numbers:** PhoneTree will remove duplicates automatically, if you check one of the two options here. Selecting **Keep Duplicates** (default) will keep your list unchanged. Keep **Removed Blocked Numbers** ON (default) unless for some reason you would not like PhoneTree to remove the people on the Blocked Number list (see the **Admin Desktop** on page 38 of the PhoneTree User’s Manual).
- d. **Daily Calling:** If you would like this PhoneTree to call the same list each day (during the call window(s) you set on the Call Times tab), check this option. You can also print your call status report automatically (choose from Never, No Answer/Not Confirmed or After Max Tries). **Default:** OFF

Initial Setups: Call Options, continued

- e. **Create Results File** (Jobxx.out) **for another application:** If you would like to save a call status file that another application (like your member management program) can use later, check this option. **Default:** OFF
- f. **Call Logging:** If you would like the calls made with *this PhoneTree* to be included in the system-wide call log, choose either **Log Completed Calls** or **Log All Calls** from the drop-down menu. Read more about call logging on pages 27 and 28 of the PhoneTree User's Manual. **Default:** OFF

⑧ Click the **OK** button.

⑨ 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 computer's mic. 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).

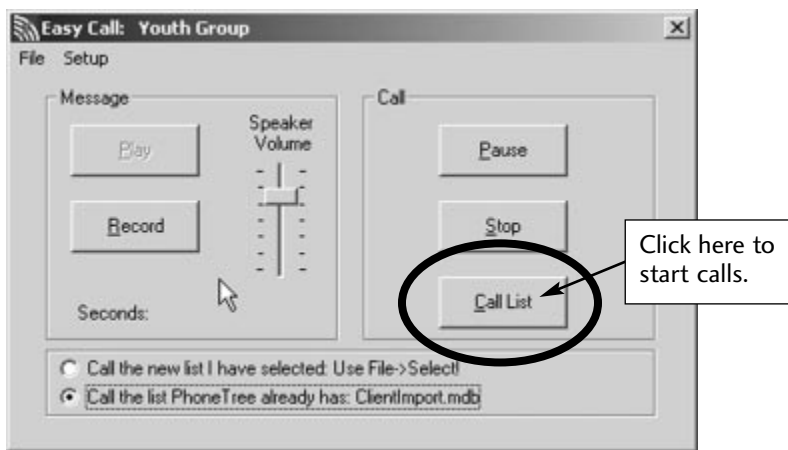


- ⑩ When you are happy with your message, click one of the radio buttons at the bottom of the screen:
- a. **Call the new list I have selected: Use File -> Select!:** Use this if you have generated a new list locally (on your own computer) using third-party software. Turn to the Importing Data section (page 21) for instructions on how to do this.
 - b. **Call the list PhoneTree already has: NameOfFile.mdb:** Use this if you want PhoneTree to call using the file that is currently active on the server machine for this PhoneTree. The correct name of this file will appear here (if you see **No list available!** then you will need to go to the PhoneTree host computer and select a list for this PhoneTree).

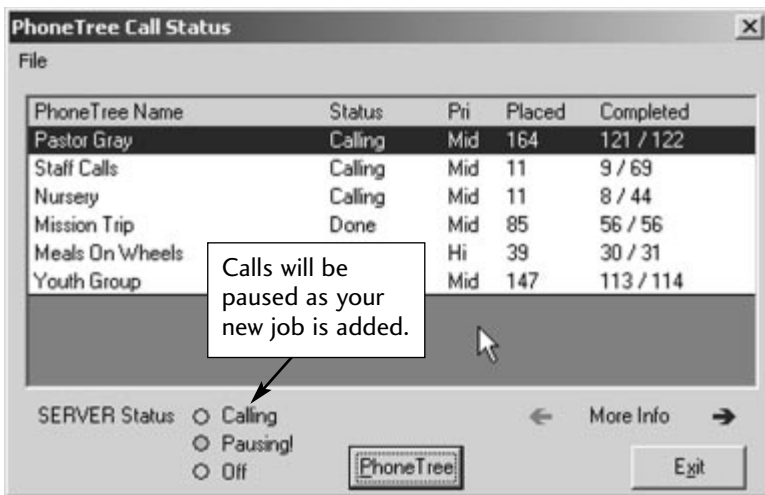
Daily Operation: Starting a Call Job

Starting a Call Job

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



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



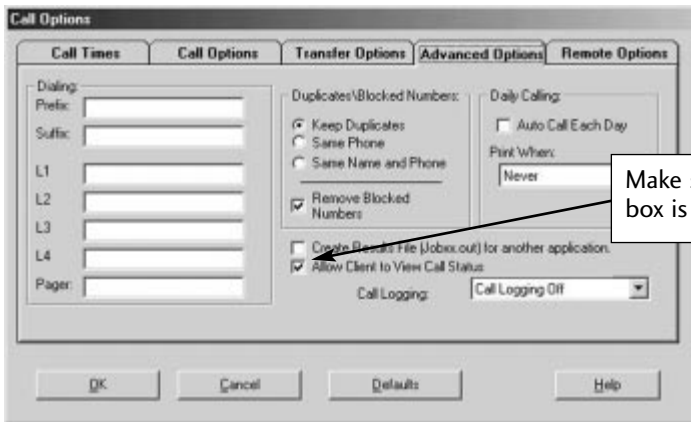
You can monitor calls for the currently active PhoneTrees right here from your own computer. The information shown is updated every few seconds.

Daily Operation: Checking Call Status

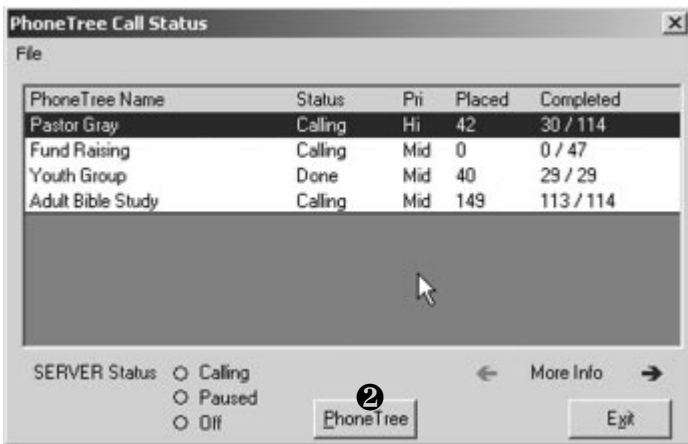
Checking Call Status

Once your call job is complete, you will probably want to check the Call Status, which will give you a complete report on the call job. Here's how:

- 1 First, you must contact your PhoneTree Administrator or visit the Host computer. Go to the **Edit** screen of the PhoneTree for which you want to view the Call Status, and choose **Call Options** from the **Setup** menu. Click on the **Advanced Options** tab and make sure that the **Allow Client to View Call Status** box is checked. This must be done on the Host computer and cannot be done from within the PhoneTree Network Client. You will only need to do this once for each PhoneTree.

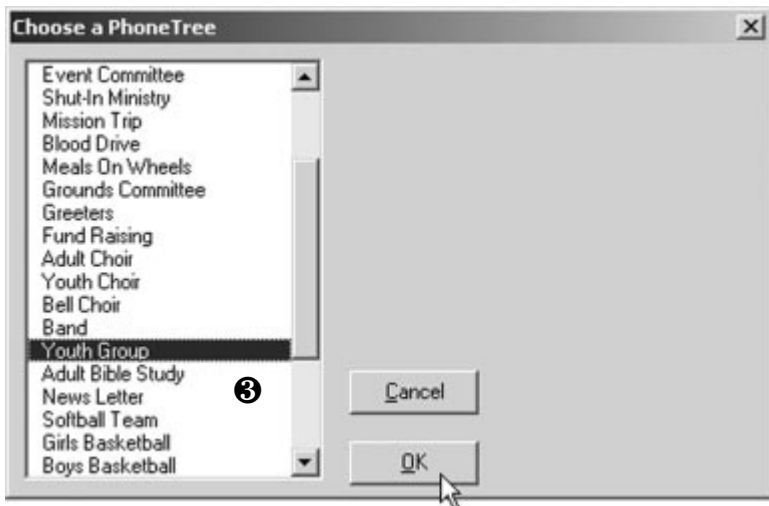


- 2 Now, go back to the PhoneTree Network Client on your computer and click the PhoneTree button on the main screen (PhoneTree Call Status).

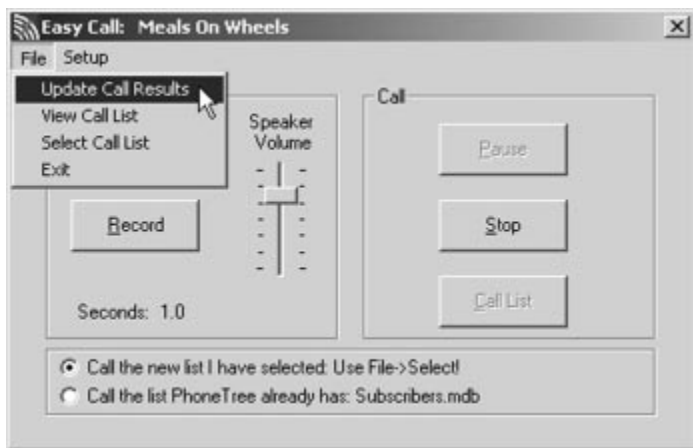


Daily Operation: Checking Call Status, continued

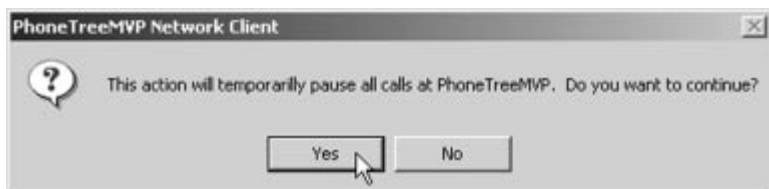
- ③ Choose the PhoneTree for which you would like to view the Call Status and click OK.



- ④ Now you are back on the **Easy Call** screen for that PhoneTree. Choose **Update Call Results** from the **File** menu.



- ⑤ Click the **Yes** button on the dialog box that follows:

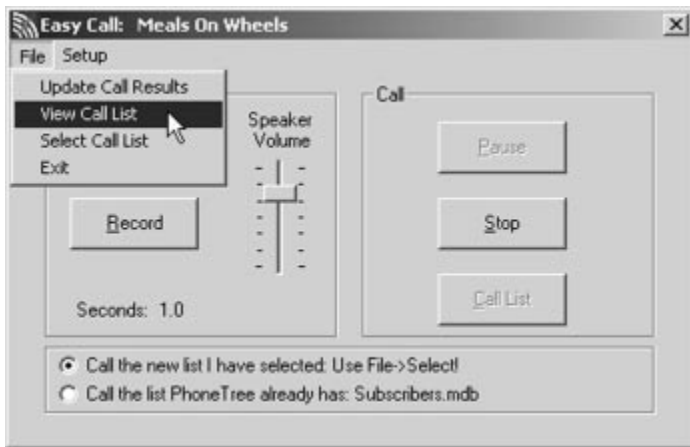


Daily Operation: Checking Call Status, continued

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

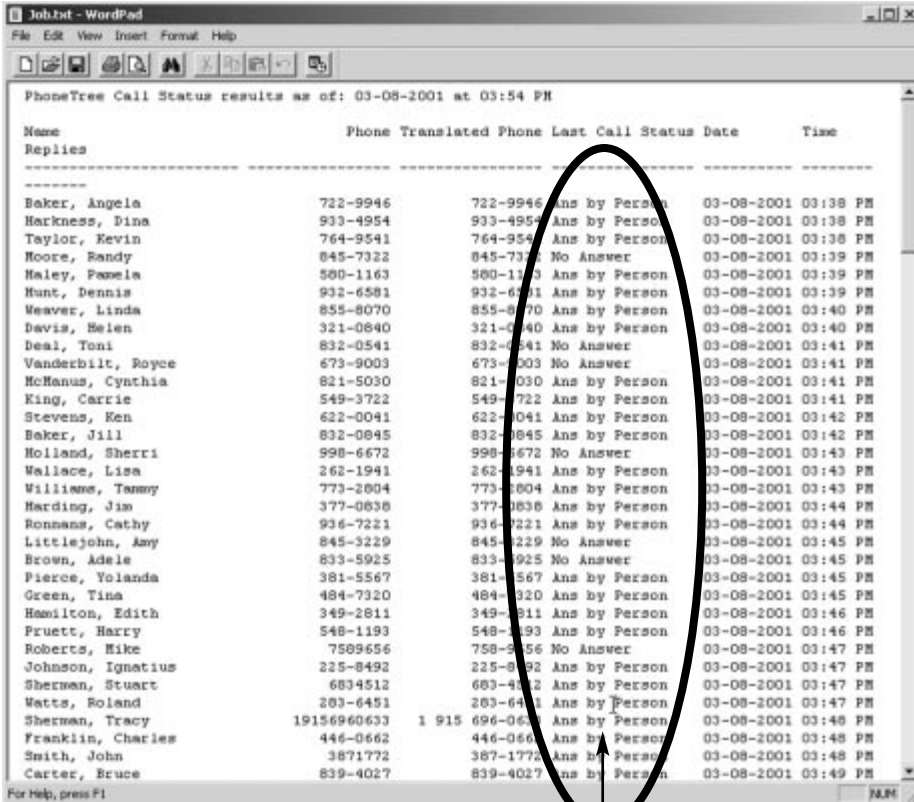


- ⑦ You will be taken back to the PhoneTree Call Status screen (the main Client screen) and you can watch as calls are temporarily paused while an up-to-date call list is generated on the Host machine.
- ⑧ Once calls have resumed and the green light is back on, click on the **PhoneTree** button again, and choose your PhoneTree from the **Choose a PhoneTree** screen again (repeat steps 2 and 3).



- ⑨ Choose **View Call List** from the **File** menu of the **Easy Call** screen:
- ⑩ The **Call List** (including the most recent Call Statuses) for this PhoneTree will be opened automatically as a text file (**Job.txt**) in WordPad. This is a new text file generated by PhoneTree and now resides in your PhoneTree Client folder locally, on your computer. It should look like the picture on the opposite page.

Daily Operation: Checking Call Status, continued



Job.txt - WordPad
File Edit View Insert Format Help

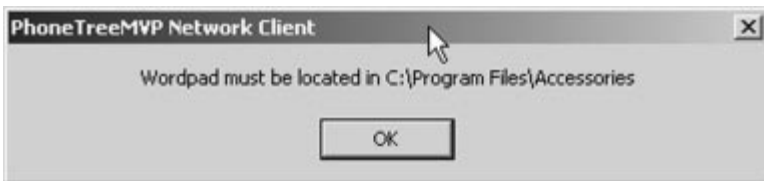
PhoneTree Call Status results as of: 03-08-2001 at 03:54 PM

Name	Phone	Translated Phone	Last Call Status	Date	Time
Baker, Angela	722-9946	722-9946	Ans by Person	03-08-2001	03:38 PM
Harkness, Dina	933-4954	933-4954	Ans by Person	03-08-2001	03:38 PM
Taylor, Kevin	764-9541	764-9541	Ans by Person	03-08-2001	03:38 PM
Moore, Randy	845-7322	845-7322	No Answer	03-08-2001	03:39 PM
Haley, Pamela	500-1163	500-1163	Ans by Person	03-08-2001	03:39 PM
Hunt, Dennis	932-6581	932-6581	Ans by Person	03-08-2001	03:39 PM
Weaver, Linda	855-8070	855-8070	Ans by Person	03-08-2001	03:40 PM
Davis, Helen	321-0840	321-0840	Ans by Person	03-08-2001	03:40 PM
Deal, Toni	832-0541	832-0541	No Answer	03-08-2001	03:41 PM
Vanderbilt, Royce	673-9003	673-9003	No Answer	03-08-2001	03:41 PM
McManus, Cynthia	821-5030	821-5030	Ans by Person	03-08-2001	03:41 PM
King, Carrie	549-3722	549-3722	Ans by Person	03-08-2001	03:41 PM
Stevens, Ken	622-0041	622-0041	Ans by Person	03-08-2001	03:42 PM
Baker, Jill	832-0845	832-0845	Ans by Person	03-08-2001	03:42 PM
Holland, Sherri	998-6672	998-6672	No Answer	03-08-2001	03:43 PM
Wallace, Lisa	262-1941	262-1941	Ans by Person	03-08-2001	03:43 PM
Williams, Tammy	773-2804	773-2804	Ans by Person	03-08-2001	03:43 PM
Harding, Jim	377-0838	377-0838	Ans by Person	03-08-2001	03:44 PM
Ronnans, Cathy	936-7221	936-7221	Ans by Person	03-08-2001	03:44 PM
Littlejohn, Amy	845-3229	845-3229	No Answer	03-08-2001	03:45 PM
Brown, Adele	833-5925	833-5925	No Answer	03-08-2001	03:45 PM
Pierce, Yolanda	381-5567	381-5567	Ans by Person	03-08-2001	03:45 PM
Green, Tina	484-7320	484-7320	Ans by Person	03-08-2001	03:45 PM
Hamilton, Edith	349-2811	349-2811	Ans by Person	03-08-2001	03:46 PM
Fruett, Harry	548-1193	548-1193	Ans by Person	03-08-2001	03:46 PM
Roberts, Mike	758-9656	758-9656	No Answer	03-08-2001	03:47 PM
Johnson, Ignatius	225-8492	225-8492	Ans by Person	03-08-2001	03:47 PM
Sherman, Stuart	6834512	683-4512	Ans by Person	03-08-2001	03:47 PM
Watts, Roland	203-6451	203-6451	Ans by Person	03-08-2001	03:47 PM
Sherman, Tracy	19156960633	1 915 696-0633	Ans by Person	03-08-2001	03:48 PM
Franklin, Charles	446-0662	446-0662	Ans by Person	03-08-2001	03:48 PM
Smith, John	3871772	387-1772	Ans by Person	03-08-2001	03:48 PM
Carter, Bruce	839-4027	839-4027	Ans by Person	03-08-2001	03:49 PM

For help, press F1

Call Status is in this column.

If instead of the **Job.txt**, you get an error message like the one below:



Use Windows Explorer to locate and move a copy of Wordpad to the directory shown in the dialog above (the PhoneTree Client software needs to know where Wordpad is, since it uses Wordpad to display your Call Status).

Daily Operation: Checking Call Status, continued

Standard Call Statuses

- Not Called Yet** – Person has not been called yet
- Ans by Person** – Message was delivered to a person
- Phone Was Busy** – Phone was busy on last call to person
- Did Not Answer** – Person did not answer last call
- Ans By Machine** – Message was delivered to member's answering machine
- Learned Machine** – Person's answering machine is 'unique' and was learned (will call back)
- 9 Was Not Dialed** – Delivery unconfirmed when asked to dial 9 (will call back)
- Never Dialed 9!** – Did not confirm delivery after 3 call attempts
- Max No Answers** – Line was busy or not answered for 15 call attempts (FCC calling limit) or max attempts set by user
- Not Selected** – Person is not selected for calling
- Hung Up Early** – Call was answered but responder hung up before message finished

If the following statuses appear, please check the phone number:

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

Member Reply

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

- 0 – Indicates call was transferred to the Transfer Method you chose on the Transfer Options tab of the Call Options dialog box (page 12)
- 1 thru 9 – Meaning will vary depending on message. You may request that the person respond to a question with any touch-tone digit (ie, dial '5' to confirm that you will be at the meeting, dial '3' if you would like someone to call you back, etc...)

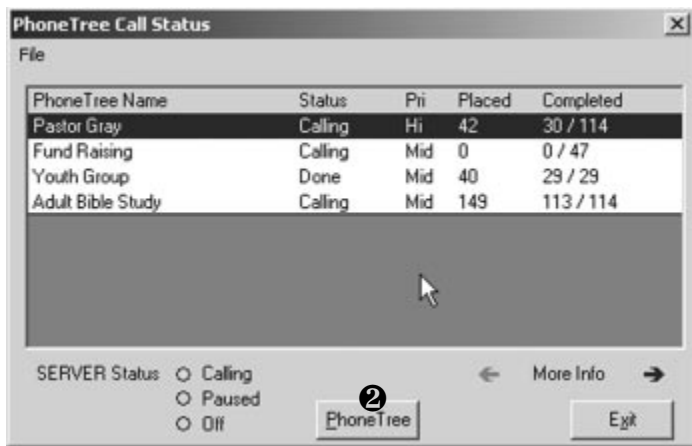
Reference: Importing Data

PhoneTree can use data generated in any member management software package as well as any common office software product (Microsoft Word, Excel, etc.). If your database application can produce an **ASCII** (.dat or .txt), or a **Comma Delimited** (.txt), **CSV** file, then you will be able to import the data into a list that your PhoneTree can use. Different applications 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 for instructions. For simplicity, save the exported data in the PhoneTree Client folder. In addition, your application may have a Custom Translator (that will show up on the Configure PhoneTree screen—see page 7). We will show here the most common translator, **Generic CSV**.



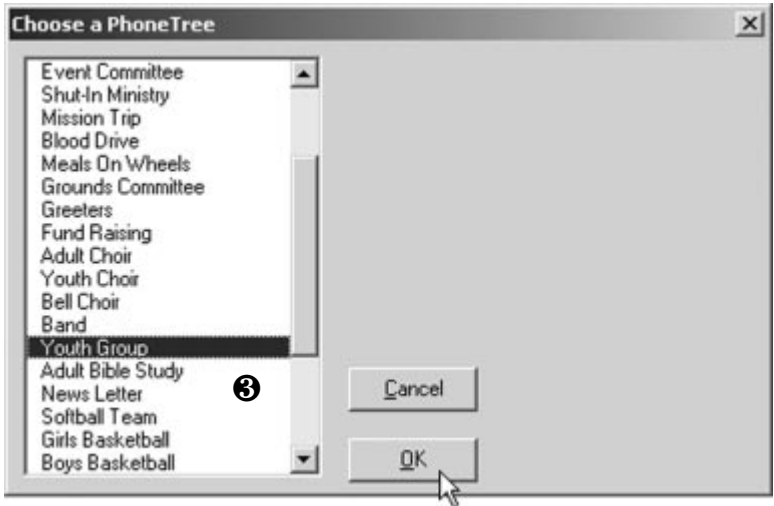
This is the exact format that your data will need to be in to work with the Generic CSV translator.

- 1 First, confirm that **Generic CSV** is chosen on the **Configure PhoneTree** screen (see page 7). This translator is actually stored on the PhoneTree Host machine, **not** locally on your computer.
- 2 Now, click the **PhoneTree** button on the main screen (PhoneTree Call Status).

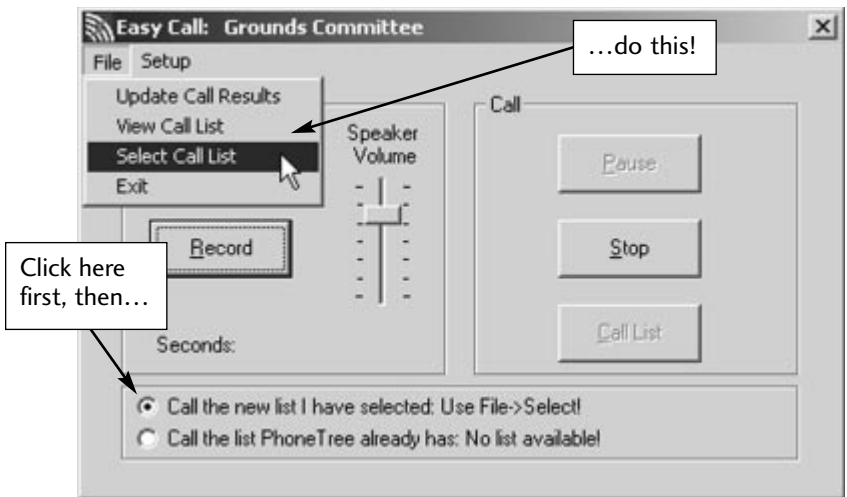


Reference: Importing Data, continued

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



- 4 Choose the **"Call the new list I have selected"** radio button, then choose **Select Call List** from the **File** menu.



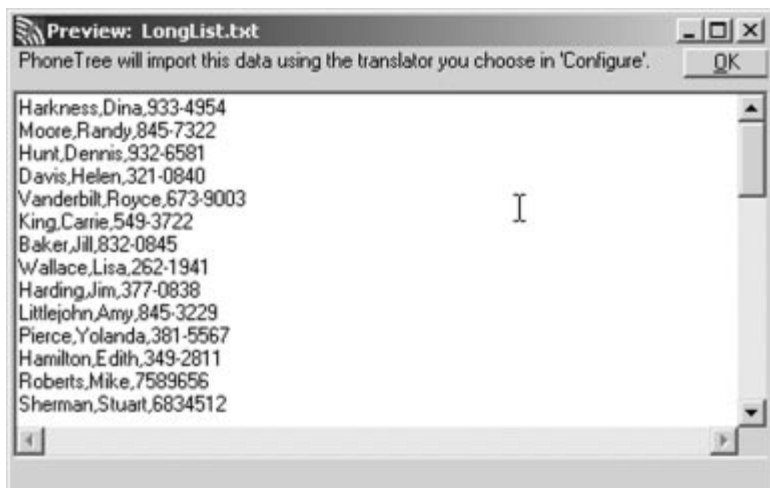
Reference: Importing Data, continued

- 5 Choose the list you would like to use from the following dialog, then click the **Open** button.



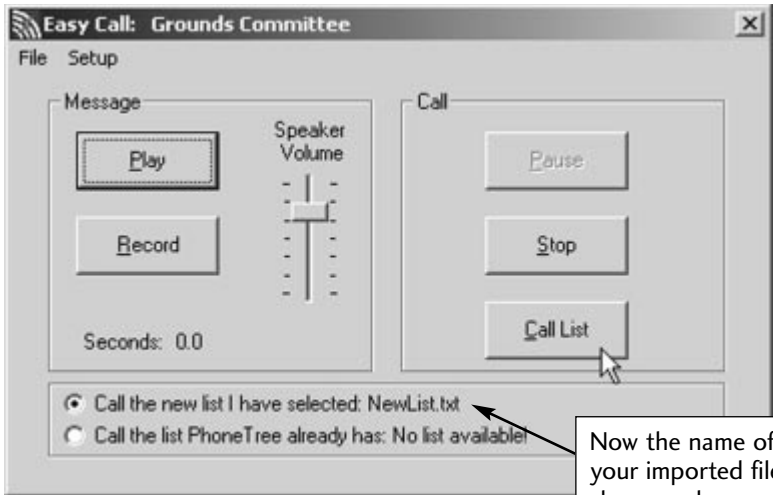
Note: this assumes you were able to export your file from the application that created it as a comma-delimited text file (.txt, .dat or .csv) and that you placed the exported file in the **PhoneTree Client** folder.

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

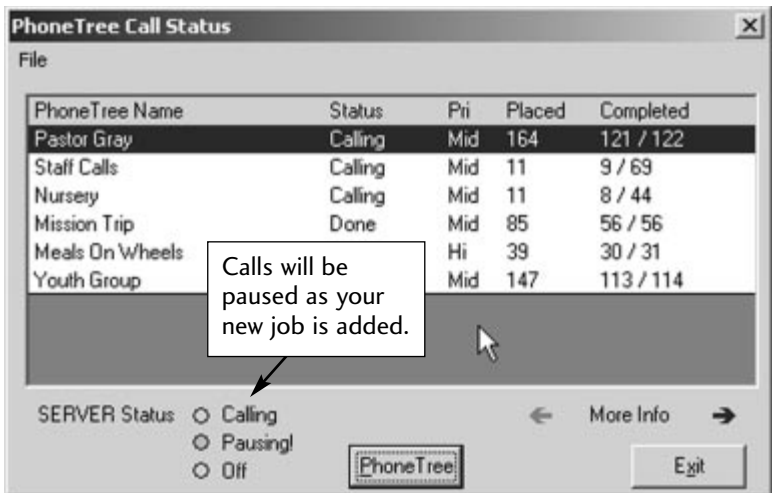


Reference: Importing Data, continued

- 7 You will be taken back to the **Easy Call** screen. Record a message if you haven't already (follow step 9 on page 14) and click the **Call List** button. Notice that now the name of your list shows up on the screen.

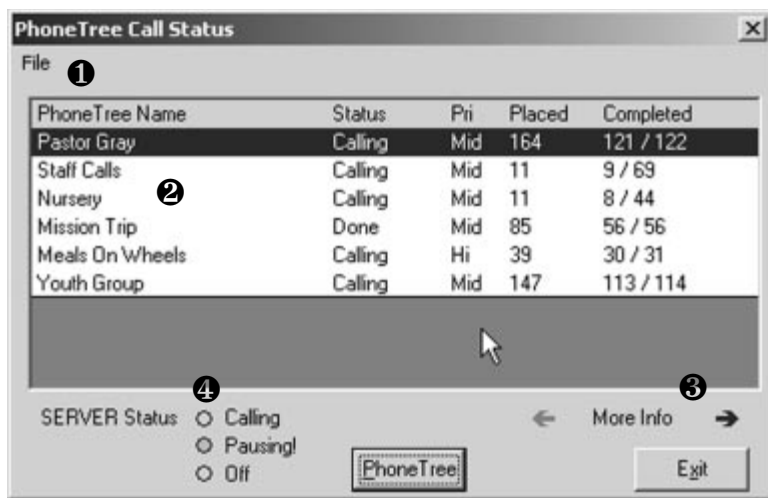


- 8 The light on the Server Status will turn from green (Calling) to orange (Pausing!), to yellow (Paused) and finally back to green again, when you will see your new call job appear in the list of PhoneTrees.



Reference: The PhoneTree Call Status Screen

- 1 The File Menu:** Allows you to Configure your Client settings (page 6) or to Exit the program.
- 2 The PhoneTree List:** Displays a list of all PhoneTrees currently calling. Check the entries in the **Status**, **Pri(ority)**, **Placed** and **Completed** columns for information about what is happening with each PhoneTree. We will talk about each of these in more detail below.



- 3 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**. The More Info arrows are used instead of a scroll bar because the PhoneTree Name remains on the left side of the screen while you look at the other columns of information. We will discuss each of these in more detail below.
- 4 Server Status:** There are three options here: **Calling** (green light), **Paused** (yellow light) and **Off** (red light). **Calling** means that the PhoneTree software is running and is currently in its call mode (the Call Screen is up on the server machine). **Pausing!** or **Paused** means that the PhoneTree software is running, but not in its call mode (one of the other Desktops may be displayed). **Off** means that the PhoneTree software is not running on the PhoneTree Host machine.

Reference: The PhoneTree Call Status Screen, continued

Call Status Headers

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

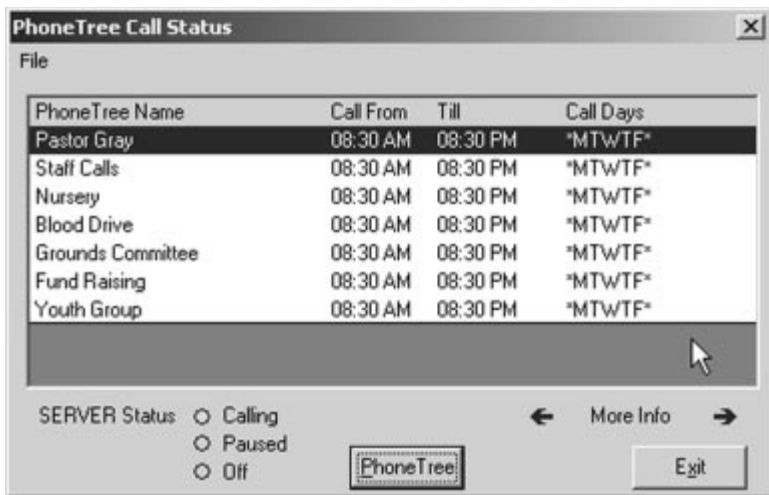
Priority: Either Low, Mid (the default) or Hi. Turn to page 11 for instructions on how to change the priority for a call job.

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

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

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

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



Call From: Displays the **Don't Call Before** time you specified on the **Call Times** tab of the **Call Options** dialog (page 9).

Till: Displays the Don't Call After time you specified on the **Call Times** tab of the **Call Options** dialog (page 9).

Call Days: Displays the Call On Days you specified on the **Call Times** tab of the **Call Options** dialog (page 9).

Reference: The PhoneTree Call Status Screen, continued

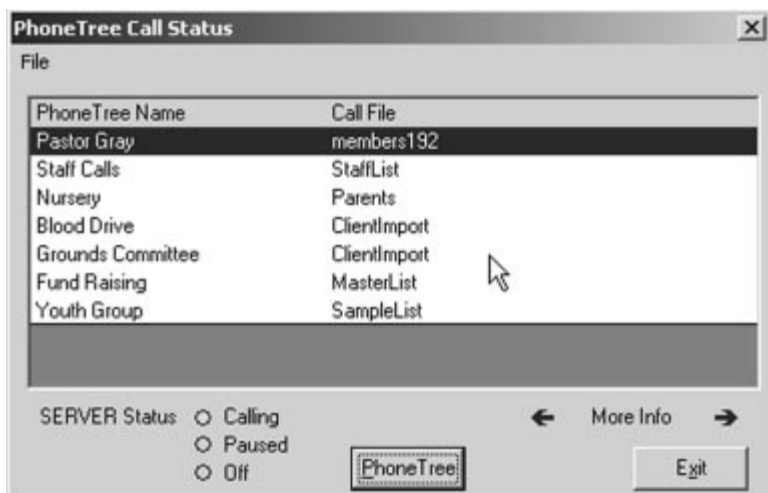
Pause At: Displays the Pause Call At time you specified on the **Call Times** tab of the **Call Options** dialog (page 9).

Resume At: Displays the Resume Call At time you specified on the **Call Times** tab of the **Call Options** dialog (page 9).

Night: Displays the Start Night Messages At time you specified on the **Call Times** tab of the **Call Options** dialog (page 9).

Call File: Shows the file that each PhoneTree is currently using for calling.

Note: any file that you 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 that you typed in on the **Call Options** tab of the **Call Options** dialog (page 11).

MaxNo9s: Displays the number of attempts PhoneTree will make if you have turned **Intro w/9** ON using the **Call Wizard** (must be done on the Host machine—page 68 in the PhoneTree User's Manual). 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 12).

Note: will only display a number if you chose Phone System as the Method.

Common Questions

Common Questions

As a PhoneTree user, you have 24-hour technical support available via e-mail, at support@phonetree.com, or on our website (www.phonetree.com).

Following is a list of common questions and their answers:

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

A. Make sure the PhoneTree host is network enabled (see page 25 in the PhoneTree User's Manual).

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 computer (see page 16). This must be done once on the Host computer and cannot be done from within the PhoneTree Network Client. Also, make sure you have first chosen Update Call Results (page 17)—this pauses calls temporarily to update the call statuses for all PhoneTrees.

Q. *What happens if no one answers the phone?*

A. PhoneTree's sophisticated voice recognition software will do one of three things when it calls:

- Deliver the message if a person answers;
- Wait for the beep of an answering machine when one is detected; or
- Mark a call attempt as a "No Answer" and call back later if no one picks up the phone or if it detects a busy signal.

You can set the number of rings PhoneTree will wait for before marking a number as a "No Answer"—check the Call Options on page 10.

Q. *Who can I call for help? When?*

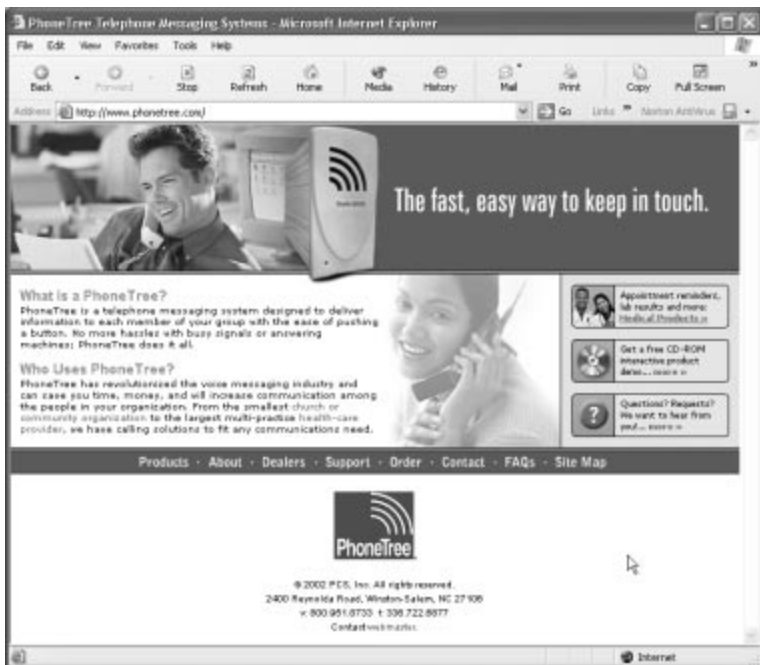
A. Call our technical support number toll-free at **(866) 234-2943** during the hours of 8:30 AM–5:00 PM Eastern Time, Monday through Friday (holidays excluded). Or submit a question via e-mail at support@phonetree.com 24 hours a day, and look for a response soon, usually within 24 hours.

Q. *How many calls will PhoneTree make?*

A. PhoneTree will make an average of 60 calls per hour, per installed phone line. Remember that PhoneTree will keep trying phone numbers if it detects a busy signal or a "No Answer," up to the maximums that you set on the Call Options tab (page 10).

The PhoneTree Website

Visit us at www.phonetree.com, where you have access to free software updates, many answers to frequently asked questions, and answers to your specific questions via our free online tech support, or call Tech Support directly at 866.234.2943 (toll-free).



Notes

Contacting PCS

By Phone

Our technical support staff is available from 8:30 AM to 5:00 PM Eastern Time, Monday through Friday at **866.234.2943**. To expedite resolution of your problem, please be near your PhoneTree and your computer, if applicable. If possible, use a different telephone line than PhoneTree.

You may also fax your question or comment to **336.722.6877**.

By E-Mail

Technical support via e-mail allows you to ask a technical question 24 hours a day, at your convenience. In most cases, you will receive a reply the next business day, or within 24 hours of your request. Send your questions to **support@phonetree.com**.

By Mail

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

Sales Contacts

Sales Phone: 800.951.8733

Sales E-Mail: sales@phonetree.com

www.phonetree.com

Regulatory Information

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



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