

6

Telephony

Introduction

DeskTop Set Dialer's integration with the telephone is uniquely practical. Windows 95 recognizes the telephone on your desk as a quintessential part of business and personal computing, and integrates its functions right into the operating system. Dialer makes this integration a reality whether you use a basic modem in your home or a state-of-the art telephone system in your office. Dialer is fully functional on its own, so that you may use it instead of the basic auto-dialer that comes with Windows.

Telephone services differ from country to country, state to state, even city to city, and are likely different even between your home and your office. Their requirements change every day, requiring you to dial 1 in front of local numbers, use an area code for certain local calls, use prefixes to reach international operators, dial an accounting code, use calling cards for business calls, etc.

DeskTop Set's Dialer accommodates these challenges with ease by helping you to recall dialing profiles of your office, home, hotel room, or a foreign country. Once set and selected, any number can be dialed with just a click whether you are in New York, Los Angeles, Paris, or on your front porch.

Why would you want to use Dialer? To gain speed, error-free dialing, cost-savings, the convenience of one-click dialing to any of the thousands of telephones in your directory, and, most importantly, the ability to conduct your business more productively.

Key Definitions of Terms and Components

The new Dialer's interface and features are more flexible and sophisticated. The following are some of the key terms, options, and components that you should be familiar with.

Account code	Some office phone systems require you to enter a personal or departmental account number for billing purposes. When you enter this in Dialer's setup, you can configure dialing formats to use this automatically.
Area code	The first three digits of a standard 10-digit US phone number.
Auto redial	The ability to redial in the background to reach a busy telephone number. You can select the time interval between and number of redial attempts, then monitor the call's progress on the display or audibly.
Call analysis	With modems that can detect call status result codes such as No carrier, Voice, Ring, or No Dial Tone, the dialer responds accordingly.
CallerID block	Lets you keep your name and phone number private when making calls. You can select an option to automatically dial a code that turns Caller ID off at the receiving end. You have the choice of blocking all calls, or some.
Country code	For international numbers, phone companies assign each country its own code number. This must be dialed after the international access number (011, in most cases).
Dialing format	Dialing formats are used as templates or strategies for dialing a particular type of number. You can customize a format to include additional digits to be dialed, such as: account codes, PBX prefixes, discount dialing prefixes, or even to ask you for a message that will be sent to a pager.
Drop-down list	Drop-down lists let you select and dial another number from Address Book, a different Dialing Format, or make a call from a list of recently dialed numbers.
Exchange	The first three digits after an area code in a US phone number.

Modem	A communications device that enables your computer to dial and transmit data over a telephone line. A Windows Plug-and-Play modem is preferable.
Sliding controls	Sliding control bars let you adjust your modem's volume or change the interval between redial attempts. You can also adjust the volume of your speakerphone, handset, or headset when using TAPI-compatible telephones.
Status display	The dialer's display shows the progress of a call using words, pictures, the person's name and company, number of redial attempts, a call timer, and other useful information.
TAPI	TAPI stands for Telephone Application Programming Interface. This is the Microsoft standard for managing your telephone from the Windows desktop. It gives software developers a hardware independent set of commands to use, much like printer or video drivers are used.
Toll list	Some phone companies are now requiring that you dial 1 or an area code, or both, for particular local calls. It is determined by the first three digits (exchange prefix) of the phone number. Toll list allows you to indicate these prefixes in the dialer's setup, and the program properly dials any local number.
Unimodem/V	A driver that allows communication programs to "talk" to all Hayes-compatible and voice modems. It adds support for features such as voice, CallerID, and the playing and recording of WAV files.

Why are TAPI and Unimodem/V important?

TAPI stands for Telephone Application Programming Interface. This is a Microsoft standard for controlling your telephone from the Windows desktop, and is supported by many of the newer modems. The most popular advantage to TAPI-compliant (or "voice") modems is their ability to use your PC's microphone and speakers as a hands-free speakerphone, so that you do not need to lift the handset.

DeskTop Set-by-Phone requires a Unimodem/V-compliant voice modem, since this is the technology that allows you to hear the computer's synthesized voice over the modem. Your modem manufacturer will be able to tell you whether or not your modem will work with Unimodem/V drivers. We have provided these drivers on the DeskTop Set installation CD-ROM.

If you are using Windows 3.1x, please *see* "Windows 3.1 users" on page 299 for information regarding using voice modems with Windows 3.1x.

To install the Unimodem/V driver from the DeskTop Set CD-ROM:

- ◆ You must be running Windows 95. If you are using Windows 3.1, skip to “To install the TAPI drivers for Windows 3.1:” on page 299.
- ◆ Place the CD-ROM in the drive.
- ◆ If the CD does not start automatically, open the CD and double-click the **Auto-run.exe** file.
- ◆ From the menu that appears, select the option to *Install Unimodem/V drivers...*

The most popular advantage of Unimodem/V compatible voice modems is their ability to use your PC’s microphone and speakers as a hands-free speakerphone, so that you do not need to lift the handset. With the right software (such as DeskTop Set’s Dialer) you can also hold, mute, transfer, and screen calls using your mouse.

Unimodem/V voice modems also support CallerID telephone service. If you’ve added CallerID to your phone service, these modems will pass this information to Windows, and, in turn, to the applications that can interpret them. CallerID for Call-waiting will work as long as you modem can detect it.

If you are considering purchasing a new modem, Okna’s web site, www.okna.com, contains a list of Unimodem/V compatible modems which we recommend as being easy to install, and which work best with DeskTop Set.

General considerations when using Dialer

Will it work with my modem?

The following table should help you determine what type of modem you need for particular features:

	Hayes- Compatible modem	Voice modem on regular line	Voice modem on office PBX	Unimodem/V- compliant PBX phone
Make Calls	Yes	Yes	Yes	Yes
Transfer Calls	No	No	Yes (2)	Yes
Forward Calls	Yes	Yes (1)	Yes	Yes
CallerID Service	No	Yes	Yes	Yes
Play greetings	No	Yes	Yes	Yes (3)
Record Messages	No	Yes	Yes	Yes (3)
Speakerphone	No	Yes	Yes	Yes
Auto-answer Calls	No	Yes	Yes	Yes (3)
Touch-tone access	No	Yes	Yes	Yes (3)

(1) Requires three-way calling service; (2) Requires support for hookflash or touch-tone transfer; (3) Requires the ability to play and record WAV files for text-to-speech. Available only on Windows 95 and NT.

To ensure that DeskTop Set's Dialer will be able to place calls with your modem, check to see that you can dial through the Phone Dialer program that comes with Windows 95. If you are using Windows 3.1, please see "Windows 3.1 users" below.

To test your modem with the Windows Phone Dialer:

- ◆ In Windows 95 or NT, select **Start/Programs/Accessories/Phone Dialer...**
- ◆ In Windows 3.1, use File Manager to locate the file: `\WINDOWS\DIALER.EXE` and double-click on this file to run the Windows Phone Dialer.
- ◆ Enter a number into the display.
- ◆ Click on the **Dial** button

If your modem works with this dialer, it will also dial with DeskTop Set. If you have difficulty, you should contact your modem manufacturer, or Microsoft, for assistance.

Connecting a standard phone

If you do not have a voice modem with speakerphone capability, then you will need a standard analog telephone connected (either to your modem or to a splitter connected to your phone jack) to your phone line to place calls.

We also recommend connecting an analog phone if you plan to use your modem as a speakerphone. This will allow you to pick-up the handset and prevent you from losing a call if you have a power outage or a Windows crash, or if you just want some privacy and don't wish to be on speaker.

Windows 3.1 users

Before using DeskTop Set Dialer you will need to install the Windows 3.1 TAPI drivers that are on your DeskTop Set CD-ROM.

To install the TAPI drivers for Windows 3.1:

- ◆ Place the DeskTop Set CD in your CD-ROM drive.
- ◆ Use Windows File Manager to locate the file: `\TAPI16\TAPI16.EXE`.
- ◆ Double-click on this file to install the files needed to run TAPI in Windows 3.1.

You can find additional information on the setup and testing of TAPI in Windows 3.1 in the file named `\TAPI16\TAPI_INF.TXT`, located on your DeskTop Set CD.

Please also note that the text-to-speech features used throughout dialer will only function under Windows 95 or NT. Text-to-speech uses 32-bit voice synthesis, and Windows 3.1 cannot support this feature. All other dialer features should be available in Windows 3.1 (depending on your modem's capabilities).

Starting Dialer

To launch Dialer:



Double-click on the Dialer icon to launch the application.

- ◆ Double-click the Dialer icon in Program Manager's DeskTop Set group in Windows 3.1x, **or**
- ◆ Select **Start/Programs/DeskTop Set/Dialer** from the Windows 95 Start menu, **or**
- ◆ Click on the **Dialer** button from any toolbar in Calendar, Address Book, or a Record folder, **or**
- ◆ Double-click on any phone number to start Dialer and automatically dial the number, **or**
- ◆ Right-click on any phone number and select a number to dial, or the DIALER option to start the program.

Dialer Features

DeskTop Set Dialer's window is informative and functional. You can select only required elements depending on your needs and system. Here is an illustration showing all components; most can be turned on or off using the Toolbar or **View...** menu. Description for the key components are listed below:



Display

Dialer's status and control panel. The left side shows call progress. The current person's name and phone number (if any) appears in the center. The display's right side shows the current date and time, or the call timer (when activated). A single-width, or narrow, display only shows call progress, phone number, and name when possible.

Status Bar

Shows all commands sent to your modem, the call's status, and the modem's result codes sent to your computer. If you are an advanced computer user, this can help you troubleshoot modem and dialing problems.

Drop-down lists

There are six types of lists. You can select which kind of list each drop-down displays in Dialer's setup (see "Drop-down lists" on page 317 for more detailed information).



Here you see a list of available phones for the entry shown in the Dialer's display. In this example, the right drop-down list is set to control Answer Bar modes.

Numeric pad

Allows you to enter numbers in the display. These are dialed when you click the **Dial** button. Since modems cannot accept dialing commands while a call is in progress, this cannot be used to send Touch Tones to navigate menu-driven systems.

Emergency buttons

The three buttons on the right side of the numeric pad can be programmed to dial your local fire and police departments as well as ambulance and emergency medical assistance. Just type an emergency number in Dialer's display, then assign it to a button by holding down the **Shift** key while you click on the fire, police, or ambulance buttons. You can immediately dial an emergency number by double-clicking on the appropriate button.

Sliding controls

Let you adjust your modem's volume or change the interval between redial attempts. You can also adjust the volume of your speakerphone, handset, or headset when using your voice modem as a speakerphone. You can choose what each slider adjusts (see "Sliding controls" on page 317 for more detailed information).



As you make adjustments with the sliders, they will be reflected in the Dialer's display.

As you hold your mouse over either sliding control, the mouse pointer changes to a hand allowing you to drag the slider to adjust the settings.

Above you'll see the speaker volume being adjusted with the right sliding control.

Speed-dial tabs

Let you open a desired Speed-dial pad to quickly access the numeric pad, groups of related telephones, such as Family, Friends, Clients, or Office, or a list. You may edit one by holding your **Shift** key as you click on the tab.

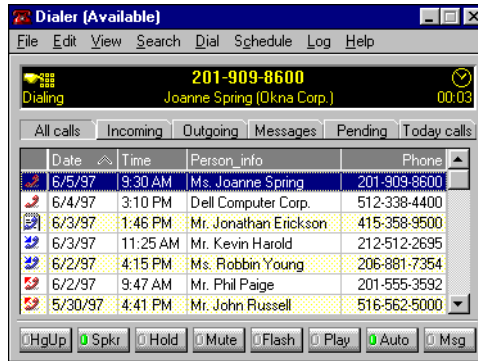
Speed-dial pad

There are three types of Speed-dial pad displays. The first is the traditional numeric dialing pad, with numbers and emergency buttons, as seen on page 301.

The second is like a traditional speed-dial pad, allowing you to dial a number just by clicking. The easiest way to program a button is to drag-and-drop a name from Address Book onto an available tab. Once the button is created, you can dial any number that belongs to that person, open Address Book, or view the record's information by right-clicking the button.

You can also set up a button by holding down your **Shift** key while you click on it. With this method, there is no link to Address Book. You may create as many pads as you wish.

The third pad type is a standard list. This can be configured to show your Address Book records, a single topic, group, or category, or your phone log.



List pad for all calls sorted by date in descending order.

Control buttons

With just a click, you can manage most aspects of a call using Control buttons:

Button	Description
Dial	When you use your keyboard or mouse to enter a number in Dialer's display, click the Dial button to place the call. You can also use this to redial the number shown in the display. The button's light turns red once the call is in progress, and blinks when auto-redial is in progress.
Speaker	Turns the speakerphone on. If you are using a Unimodem/V voice modem, you will hear a dialtone when you click this button. You can then enter a number on the numeric pad.
Hold	Places the caller on Hold. You will not be able to hear each other while on Hold.
Mute	Allows you to speak to someone else in the room without having the caller hear you. (You will still be able to hear the caller).
Flash	Dials a hookflash. The hook flash command is used to switch between calls on a three-way call, transfer calls over an office PBX, or dial an extension. This button is used to issue a hookflash manually; you can also include a hookflash in your various dialing formats.

Play	Lets you select and play a pre-recorded announcement into the phone. They can be used to deliver standard voicemail messages, so you do not have to repeat these each time someone is not in when you call.(see "Playing pre-recorded messages during outgoing calls" on page 314).
Auto-Answer	When this light is lit, Answer Bar will answer your calls according to the Mode you are in. For more information on Answer Bar, please see the Answer Bar documentation.
Message	Flashes if you have new messages waiting in Answer Bar. Click this button when it is blinking to view your messages.

Setting Up Dialer's Basic Options

The following section discusses the basic Dialer options that must be set before using Dialer for local and long distance calls. We are assuming that you already have your modem properly installed, and are familiar with its basic operation.

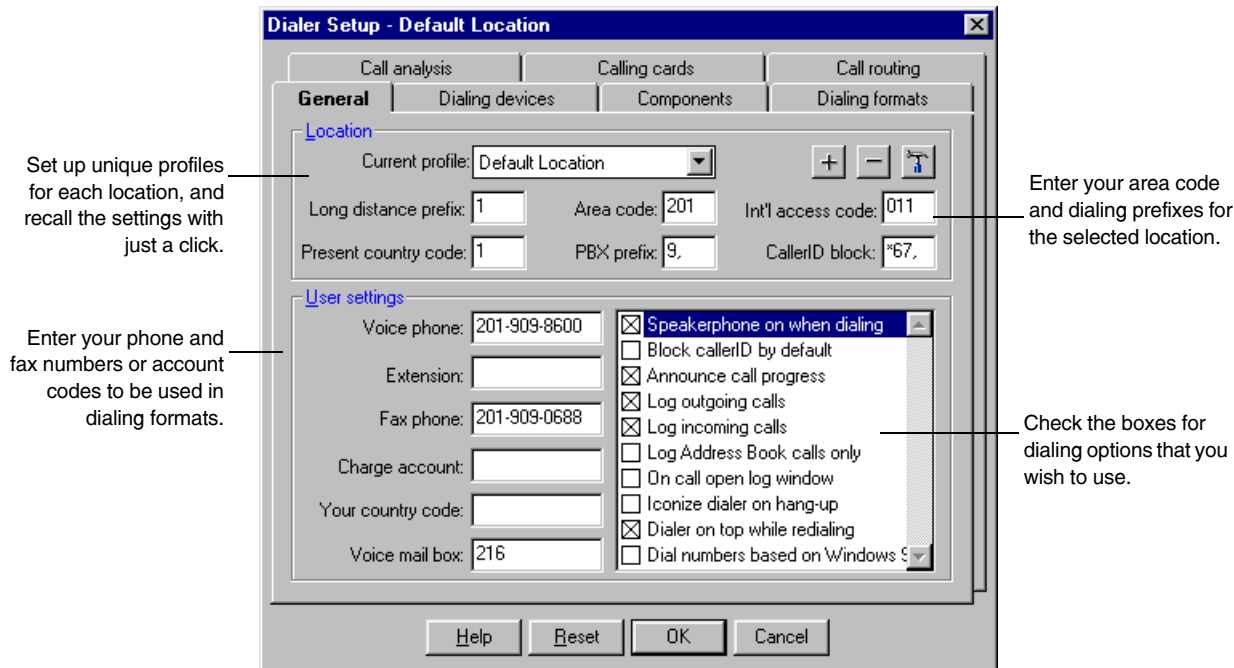
To change any of the Dialer options:

- ◆ Select **File/Dialing Setup...** from the menu bar.
- ◆ Click the appropriate tab.
- ◆ Make the necessary changes.
- ◆ Click **OK**, or select another tab, to save the changes.

If you make changes in *Setup* that lead to problems, or simply decide you do not like the results, you can instantly start over. Click the **Reset** button to restore Dialer to its "factory default" settings. You are then given the choice of restoring the entire Dialer's Setup defaults, or only the settings you are currently viewing.

General Options

The General tab contains the basic Dialer setup options. These options control how Dialer will handle each type of call you make. As you begin setting up Dialer to make basic local and long distance calls, you'll find the most important options for doing so on this tab.



The General tab combines the most frequently-used setup options into one tab for easy access and modification.

Location settings

This section contains the information needed to correctly format local, long distance, and international phone numbers. Depending on your geographic location, telephone system, and service provider, you may need to dial phone numbers in various ways. You can set these parameters for each location that you place calls from whether it be your office, your home, or a hotel room.

Options	Description
Current Profile	Your current dialing profile is listed here. Each profile can contain its own unique Dialer settings, so you can change many settings at once by simply selecting a saved profile as described below.
Long Distance Prefix	Enter any numbers that are required in order to dial a long distance number from your location. Any time you dial a number outside your own area code, this prefix will be dialed immediately before the phone number. This prefix is usually a "1".
Present Country Code	Enter the country code for your current location here. Any numbers that contain a different country code will then be dialed using the <i>International</i> dialing format.
Area Code	Enter your local area code in this field. Unless you specify otherwise, Dialer treats all numbers with the same area code as local calls. If you move from one location to another, you can simply change this code instead of changing every number in the memory pad or Address Book. (If there are numbers in your area code that must be dialed as long distance, refer to "Call Routing" on page 325).
PBX Prefix	Some office telephone systems require you to dial a Private Branch Exchange access number (such as 9) to obtain an outside line. When you enter it here, this number is dialed first, and then pauses briefly for a dial tone. The PBX prefix is not displayed during the call. Note that dialing formats must be customized to enable this feature (see "Setting up dialing formats" on page 319).
Int'l Access Code	Type the prefix that precedes an international number. In the U.S., for example, this number is 011 when using AT&T international service.
CallerID Block	Enter the CallerID block code. This code is set by your local telephone company, and prevents your information from being displayed if the person you are calling has CallerID service. If you are unsure of this code, contact your local phone company. Note that dialing formats must be customized to enable this feature (see "Setting up dialing formats" on page 319).

Dialing Profiles Dialer's settings can be saved in different combinations, or *profiles*. Profiles allow you to save your Dialer settings and recall them with just a mouse click. This is a particularly useful feature if you travel often. For example, if you work in one area code but live in another, you could have profiles named *Home* and *Office*, each configured with the appropriate area code and dialing options. The current profile's name appears in the Dialer Setup window's title bar.

To change to another profile:

- ◆ Select the profile from the *Current profile* drop-down list.

To create a new profile:



- ◆ Click the **Add** button.
- ◆ Type a name and click **OK**. The new profile appears in the list.
- ◆ Choose each of the *Dialer Setup* tabs and make any necessary changes. These will be saved to the new profile.
- ◆ Click **OK**.

To delete a profile:



- ◆ Select the profile in the drop-down list and click the **Delete** button.
- ◆ Click **OK** to confirm the deletion.

To rename a profile:



- ◆ Select the profile and click the **Setup** button.
- ◆ Change the Profile's name and click **OK**.

User Settings

These settings allow you to enter your own phone number and extension, and let you choose how Dialer will handle your phone calls.

Options	Description
Voice phone	Your phone number. This number can then be inserted into any dialing situation, such as automatically sending your phone number to someone's pager.
Extension	If you are on a PBX phone system, enter your extension number here. You can then use it in dialing formats. For example, when you define a paging format, you can automatically send your phone number and extension.
Fax phone	Your fax number. For example, when you define a paging format, you can automatically send your fax number.

Charge account	Some offices require each employee to enter their accounting code when making calls. If you use such an account, enter your account number here. Dialer can then automatically dial this number before each call (Note that dialing formats must be customized in order to automatically insert these codes).
Your country code	Your country code specifies the country you are dialing from. Any number with a different country code will be dialed according to the International dialing format.
Voice mail box	If you have a voice mail box, you can enter its number here.
Speakerphone on when dialing	Check this option to automatically enable your PC's microphone and speakers as a hands-free speakerphone whenever you dial. When this option is turned off, you can turn the speakerphone on selectively by clicking Dialer's Spkr button.
Block CallerID by default	Check this option to dial the CallerID block code before every call. This prevents your information from being sent to CallerID devices by dialing *67 before making a call.
Announce call progress	Dialer can announce the status of an outgoing call; you can control how calls are announced by clicking Setup's <i>Call Analysis</i> tab. This option enables or disables these announcements.
Log outgoing calls	Check this option to automatically open a call log whenever you place an outgoing call.
Log incoming calls	Check this option to automatically open a call log whenever you answer an incoming call.
Log Address Book calls only	When this option is checked, Dialer will only log incoming calls from people who are in your address book. If this option is unchecked, Dialer will log the CallerID information for callers, even if they are not in your address book(s).
On all open log window	When you choose to log calls, you can automatically open the call log window to edit the Subject or notes for the call. If this option is not checked, the call's basic information will be logged in the background.
Iconize dialer on hang-up	When checked, Dialer will automatically minimize itself when you finish a call.

Dialer on top while redialing	When Dialer attempts to redial a busy call, this option will bring Dialer to the forefront of all your other windows by checking this option. This lets you handle the call without having to manually locate Dialer's window.
Dial numbers based on Windows 95 settings	Windows 95's <i>Modem Control Panel</i> can be used to format outgoing telephone calls. If you would like to defer your call formatting to Windows' settings rather than DeskTop Set's Dialer, check this option. (You can view Windows' dialing settings by opening the <i>Modem</i> control panel, clicking the General tab, and then Dialing Properties).

Resetting *General* Options

If you make changes to the General options and do not like the results, you can reset these options to their "factory" defaults by clicking the **Reset** button. You will then have the option of restoring the entire Setup's defaults, or only the defaults for the current page of options.

Making Calls

Once you've set the options in Dialer's **General** Setup tab, you are ready to begin using Dialer to make local and long distance calls. You can dial in several different ways from Address Book, Folders, Lists, Calendar, or Dialer itself.

From the Dialer window

You can dial numbers from the Dialer window just as if you were using a regular phone.

To dial a telephone number with a mouse:

- ◆ On the numeric dialing pad, click the numbers of the telephone.
- ◆ Click the **Dial** button.
- ◆ If you do not have a voice modem, pick up your handset and press the Spacebar on your keyboard when you are ready to begin the conversation.

To dial a telephone number from the keyboard:

- ◆ Type the numbers, **or...**
- ◆ Type the letters of the telephone number, such as 1-800-FLOWERS.
- ◆ Press the **Enter** key to dial the number.
- ◆ If you do not have a voice modem, pick up your handset and press the Spacebar on your keyboard when you are ready to begin the conversation.

When you type a number, hyphens are not necessary. If you wish, you may still insert them between the digits for easier reading. Dialer disregards them.

When dialing a mnemonic number, such as 1-800-FLOWERS, simply type both the letters and the numbers as you see them. The program automatically translates all letters into the appropriate numbers when you dial. You can also hold down the **Ctrl** key while typing the characters and Dialer immediately changes the letters into their corresponding digits. 1-800-FLOWERS would appear as 1-800-3569377 in the display area.

To dial a speed-dial pad number:

- ◆ Double-click the pad button using the left mouse button, **or...**
- ◆ Type the name of the desired number in the Dialer display area exactly as it appears on the associated pad button and click the **Dial** button, **or...**
- ◆ Right-click the button (if it is linked to an address book record) and select a phone number to dial from the list that appears.

When typing the name of a number in the pad, be sure to enter the name exactly as it appears on the pad button. The dialer will not make guesses if no match for the typed name is found. For example, typing *Office* will dial the number labeled *Office* if it exists, but it would not dial the number for *Officer*.

To dial from a List Pad:

- ◆ Select the entry you would like to dial.
- ◆ If the number in Dialer's display (the page number) is the one you want to call, click the **Dial** button.
- ◆ If you would like to call another number for this entry, select it from the **Dial** menu.

Dialing From Address Book

Any telephone number that you have entered into Address Book can be dialed automatically. This feature is enabled by default; if you are unable to dial from address book as described here, select *File/Setup* from the Address Book menu, click the *Dialing* tab, and check the option marked *Enable Dialing*.

Page number The *Page Number* is the telephone number that appears in Address Book next to the page entry for an individual or company. (Do not confuse this with *Pager Number*, which is the number for a person's beeper).

To dial a page number:

- ◆ Double-click on the page number field, **or...**
 - ◆ Select the page number and press the **Enter** key.
- Dialer will pop up and automatically begin dialing.

Other numbers Dialing any of the entry's other numbers is as easy as dialing the page number, using the **Dial** menu.

When you open the **Dial** menu, it displays all of the available numbers for the currently selected Address Book entry. Numbers for which the person or company has no corresponding information are grayed out.

To dial one of the available numbers:

- ◆ Open the **Dial** menu and select the desired number **or...**
- ◆ Right-click the Page Number and select any other number from the list that appears.

Dialing From Calendar

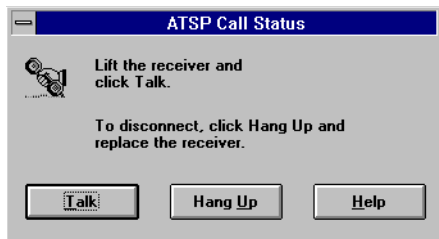
Once a Calendar event has been linked to an Address Book record, you can use Calendar's **Dial** menu same way as you would in Address Book's.

To dial one of the phone numbers for a linked entry:

- ◆ Select the linked event in Calendar.
- ◆ Right-click the telephone icon to the right of the event's description and select a number to dial, **or...**
- ◆ Open the **Dial** menu and select the desired number.
- ◆ Dialer is immediately launched and the selected number is dialed.

Dialing with a non-voice modem

If you do not have a voice modem, or have not installed Unimodem/V, outgoing calls will be handled in a slightly different manner. Once a call has been dialed, you will see the following window:



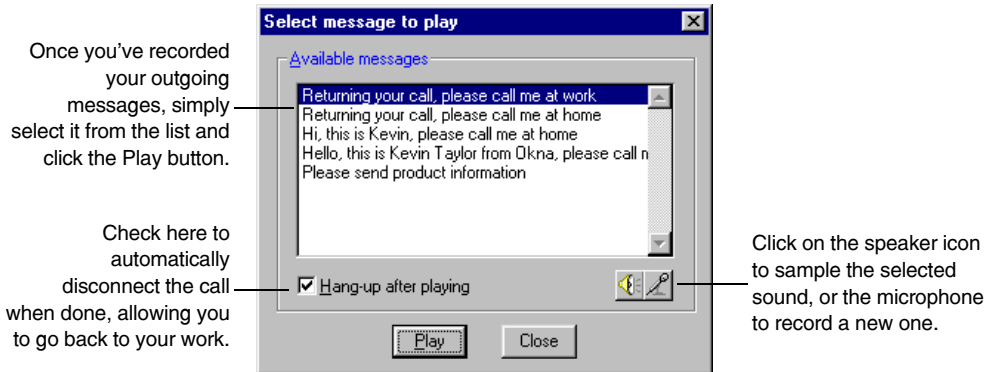
You will need to pick up your phone's handset or headset, or activate its speakerphone, then click on the **Talk...** button. This will disconnect your modem without hanging up the call, and let you continue your conversation. If you wish to cancel the call, just click on the **Hang Up...** button.

Playing pre-recorded messages during outgoing calls

When you reach someone's voicemail, you can leave perfectly punctuated, pronounced, unhurried, full-impact messages that you've recorded earlier.

To leave a pre-recorded message:

- ◆ Place a call with Dialer as you normally would.
- ◆ When you hear the outgoing voice mail message, select one of the prerecorded messages and click the **Play** button.



Note:

The outgoing messages contain personalized information, such as your name or return phone number. You can record these by selecting **File/Record greetings...** from the Dialer window.

Setting up Dialer's Advanced Options

Once you've become comfortable with making calls from DeskTop Set, you will likely realize the need to customize Dialer further. You may find particular numbers or prefixes that need to be dialed in a unique manner, or want to save groups of settings that can instantly be recalled whenever you travel, or need to configure Dialer to use your calling cards. You might also want to customize Dialer's display, so you only see the information you need to see, or have Dialer automatically log your important calls, or even create custom dialing strings to work with pagers or your office PBX.

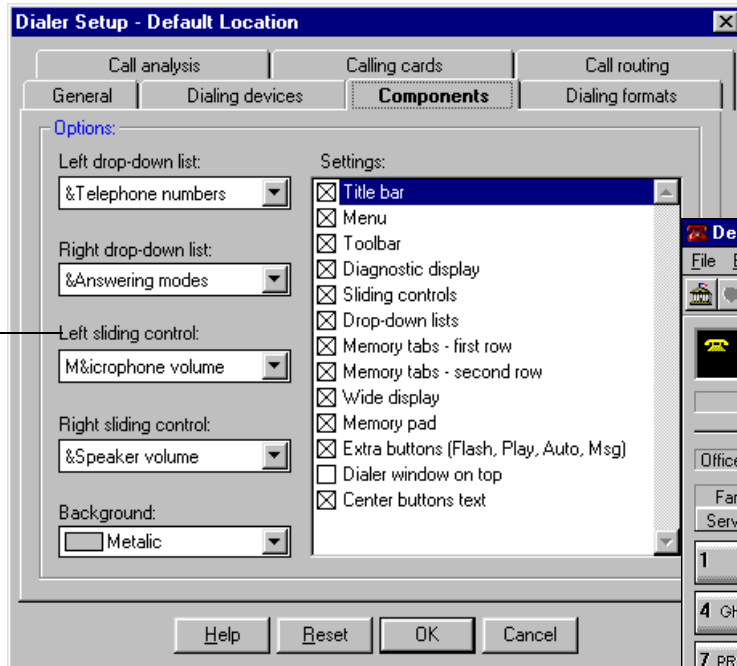
Dialer can easily be customized to address each of these situations. You'll find Dialer's setup is organized into logical tabs, so you can add a single advanced feature at a time without having to be familiar with every possible **Setup** option.

Components

You can mix and match any combination of display types, sizes, controls, tool, title and menu bars to customize the Dialer interface.

To customize Dialer's display:

- ◆ Choose **File/Dialing Setup** from the Dialer's menu bar.
- ◆ Click the **Components** tab.
- ◆ Make the necessary changes to the **Components** options.
- ◆ Click **OK**.



This shows most Dialer components using the narrow view.

The *Options* section lets you choose which features correspond with the pull-down menus in Dialer's main window, and also select a background color.

The *Components* tab lets you customize the look in real time. If you frequently need access to all of Dialer's features, select all options.



Wide view, with memory pads turned off.



This view uses the least options and is best used when primarily dialing from Address Book.

Drop-down lists The left and right drop-down lists can be set to show the following:

Options	Description
Telephone numbers	This shows a list of phone numbers belonging to the selected record in Address Book. Select a number from the list to bring it up in Dialer's display.
Dialing formats	This shows a list of available dialing formats. Select one to force the program to dial differently than normal.
Last dialed numbers	This shows a list of the last ten numbers you have dialed. Select one to bring it up in Dialer's display.
Dialer pads	Displays a list of all available Speed-dial pads. You can then quickly switch between pads by selecting them from the list.
Outgoing messages	Shows a list of your pre-recorded, outgoing messages. You can then play any one of these messages by selecting it from the list.
Answering modes	Allows you to select any of Answer Bar's answering modes right from Dialer. Simply select the mode from the list.

Sliding controls The left and right sliding controls can be set to the following:

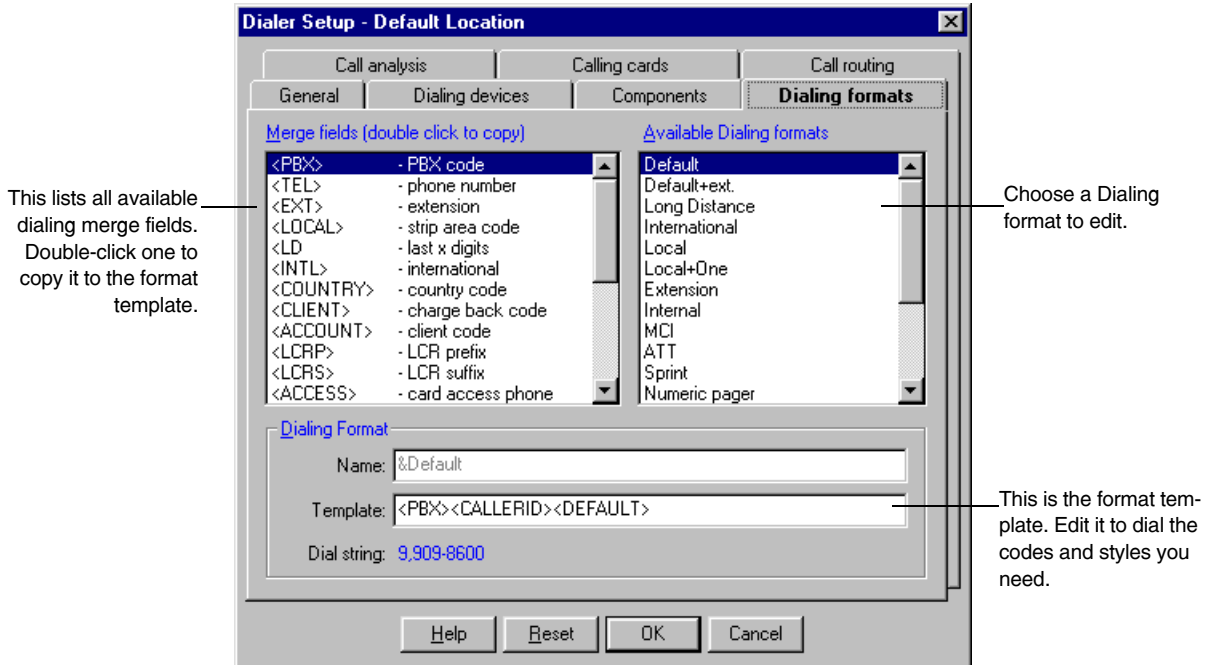
Options	Description
Redialing interval	Changes the length of time between redial attempts.
Modem sound volume	Adjusts the volume of your modem speaker.
Speaker volume	If your computer is connected to a TAPI-compliant phone system, the sliders are used to control the speaker's volume when you use Dialer as a hands-free speakerphone.
Microphone volume	If your computer is connected to a TAPI-compliant phone system, the sliders are used to control the microphone's volume when you use Dialer as a hands-free speakerphone.

Background Select a color for Dialer's window from this list.

Show Mark the components that you would like to appear in Dialer's window. You can hide any component by removing its checkmark.

Dialing formats

Depending on your geographical location, telephone system, and telephone service, different types of numbers need to be dialed differently. DeskTop Set Dialer helps you accomplish this task with Dialing formats.



You can edit several formats to handle local, long distance, international, calling card calls, and more.

As an example, let's consider the business phone number 201-909-8600 at Okna Corporation of Paramus, New Jersey, USA. Let us assume that Okna Corporation has offices around the world and that the above number belongs to Kevin Taylor.

Suppose that an Okna salesperson, who regularly calls Kevin, travels often and carries along a laptop PC. Here are the numbers that this person dials to reach Kevin from various places:

Calling from	Number	Comment
Jersey Office	8600	Ext. (last 4 digits)
Home in Jersey	909-8600	Local
New York City	1-201-909-8600	Long distance
Okna's LA office	8-201-909-8600	Internal long distance
A hotel in LA	9-950-1022-201-909-8600	MCI credit card
London office	011-35-201-909-8600	International

Sometimes a substantial effort is required to complete a call. Consider an attorney with a large law firm who, for billing purposes, must dial his client's number in the following format:

PBX - CASE CODE - PHONE NUMBER - ATTORNEY CODE

9-#9449#-1-201-909-8600-#353#

There are 23 digits just to dial one number! Many calls are made with credit cards or through alternative long distance carriers, which also require a great deal of button-pushing. These examples illustrate the variety of dialing strategies and formats that may be needed to reach a single phone number.

How would it feel to make a credit card or long distance call with just a single command or mouse click?

Dialer automatically knows how to format any number for local, long distance, or international calls when no special codes are required. You can also specify a more complex format using the **Dial/Options...** command in Address Book.

Setting up dialing formats

Because dialing varies from one phone system to another, we have provided a method to set up flexible formats. There are keywords for every number or code that the Dialer needs. The templates for each format are entered in the *Dialer Setup* dialog box's **Dialing Formats** tab.

To set up or edit dialing formats:

- ◆ Select a format to edit from the *Available dialing formats* list.
- ◆ Enter or edit the format for each command. All the available keywords are displayed in the *Merge fields* list. As you double-click the keywords you wish to include, they appear below in the template display.
- ◆ When you are finished, click **OK**, or select another tab, to save the new formats.

To quickly insert one of the available merge fields into a format line:

- ◆ Place the cursor on the template line where you want to insert the field.
- ◆ Double-click on one of the merge fields from the list.

When you dial a number, the merge fields in the selected template are replaced by the numbers they represent. The resulting command is sent to the modem.

The following table lists the currently available merge fields with a brief description of each, as well as the location where the related information can be found:

Keyword	Meaning	Location
<PBX>	PBX Code	<i>Dialer Setup</i> dialog box's General tab
<TEL>	Phone number	Dialer display
<EXT>	Extension	Address Book record
<LOCAL>	Phone number with area code stripped	Dialer display; derived
<LDx>	Last x digits of number	Dialer display; derived
<INTL>	Intl. access code	<i>Dialer Setup</i> dialog box's General tab
<COUNTRY>	Country code	Address Book record is compared to <i>Dialer Setup</i> dialog box's General tab setting.
<CLIENT>	Client code	Address Book record Account field
<ACCOUNT>	Charge account	<i>Dialer Setup</i> dialog box's General tab
<LCRP>	Least-Cost Routing prefix	<i>Dialer Setup</i> dialog box's Call Routing tab
<LCRS>	Least-Cost Routing suffix	<i>Dialer Setup</i> dialog box's Call Routing tab
<ACCESS>	Card access phone	<i>Dialer Setup</i> dialog box's Calling Cards tab
<ALTNUM>	Alternate access	<i>Dialer Setup</i> dialog box's Calling Cards tab
<CARD>	Card number	<i>Dialer Setup</i> dialog box's Calling Cards tab
<DEFAULT>	Default formatting	Internal to Dialer

Keyword	Meaning	Location
<HANGx>	Hang up in x seconds	Entered on format line
<QUERY>	Data to send to pager	Pager query dialog box at the time of call
<PAGER#>	Pager account number	Address Book record's Pager Account field
<STRATEGY> (used only in the default format)	If the telephone matches the area code entered in the Dialer's Setup, the number is dialed using the Local strategy, else the Long Distance strategy is used	Internal to Dialer, see the explanations below.
<MYTEL>	Your phone number	<i>Dialer Setup</i> dialog box's General tab.
<MYEXT>	Your extension	<i>Dialer Setup</i> dialog box's General tab
<CALLERID>	CallerID block Code	<i>Dialer Setup</i> dialog box's General tab
<FLASH>	Hookflash	<i>Dialer Setup</i> dialog box's Dialing devices tab

The table below gives the examples of dialing formats for an office telephone system that requires a PBX code and a pause for a tone before dialing the actual number. The PBX code is "9," (the comma inserts a pause), and the number in the Dialer display is 201-909-8600. The dashes are shown for clarity, but are not required:

Format	Template	Results
Extension	<LD4>	8600
Local	<PBX><LOCAL>	9,909-8600
Internal	8,1<TEL>	8,1-201-909-8600
Long Distance	<PBX>1<TEL>	9,1-201-909-8600
International	<INTL><COUNTRY><TEL>	011-35-201-909-8600
MCI Card	<PBX><ACCESS>0<TEL>	9,950-1022-0-201-909...

The <STRATEGY> keyword is used when you need, for example, to dial local calls with the prefix 8, and long distance with the prefix 9.

To use the <STRATEGY> keyword, enter it into the “Default:” edit field. Then, enter an appropriate sequence into the *Local* and *Long distance* edit fields. In the example above, <PBX><LOCAL> and <PBX>1<TEL> should be entered into the respective fields.

If <DEFAULT> is used instead of <STRATEGY>, Dialer would not look at the Local and Long Distance fields. It would simply use or drop the area code depending on your location.

Dial String This area at the bottom of the window shows the information that is sent to your modem, using the number currently in Dialer’s display. The “AT..DT” portion of the dial string is a set of modem commands. The actual phone number begins after “DT.”

Verifying dialing formats **To see how a phone number is formatted:**

- ◆ Hold down the **Ctrl** and **Alt** keys while issuing the dial command. The *Dialing format* dialog box appears.

The template for the selected format is displayed in the upper line of the dialog box. The lower line shows the string that is sent to the modem. The phone number usually appears on the right end of this string. Characters on the left side of this string are modem commands. To find out more about these commands, see your modem’s User’s Guide.

Overriding dialing formats To override the Dialer’s formatting of command strings, enter the “&” character in front of the number in Address Book or on Dialer’s display. As stated above, a “,” (comma) can be used to indicate a pause. For example, to dial an internal number that requires dialing 8 first, you would enter: &8,909-8600.

This is useful when you want to dial an unusual number directly from the display that would not be formatted correctly by the Dialer’s default formatting. (The default formatting, depending on the Dialer’s setup, may add least-cost routing prefixes, a “1”, etc., to the number).

Selecting a dialing format Based on a caller’s geographical location, any phone number can be dialed internally, locally, long distance, as an extension, internationally, or with other additional formats. You can assign a specific dialing format to each phone number, so pagers are dialed properly as well as fax numbers. For information on setting up formats, see “Setting up dialing formats” on page 319.

To change a number's format:

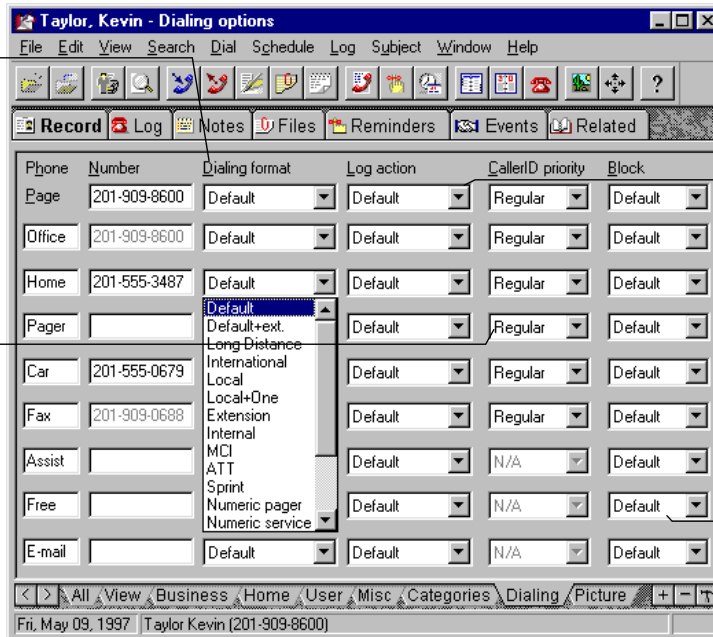
- ◆ Open the entry's folder and click on the **Record** tab.
- ◆ Click on the **Dialing** filter tab.
- ◆ Open the combo-box for the number by clicking on the down-arrow.
- ◆ Select the desired format.
- ◆ Close the folder or select another tab to save your changes.

This column shows the dialing format for each of Kevin's phone numbers.

You may select a CallerID priority for each telephone, determining how CallerID reacts.

You may select whether or not to automatically log phone calls for each number.

Select for each number whether you want your CallerID information blocked from this number.



You can use the folder's Dialing tab to change telephone labels and dialing formats. This allows you to override Dialer's default dialing for specific phone numbers, such as pagers.

Each number in Address Book is automatically assigned the Default dialing template. You can select any format for each individual number.

The third column displays combo-boxes for choosing the desired dialing format for the corresponding number.

Call Analysis

Some modems are able to interpret various call conditions and inform you of what is happening on the other end of the line. You can specify how Dialer handles these various conditions., and specify a particular response to a call based on whether or not the call goes through.

Possible conditions are listed here. Select one to edit its settings.

Select the response or action to take when the call condition is determined.

Select a sound or message to notify you of the selected condition. Click the speaker to sample the sound, or the microphone to record a new one.

You can redial calls that are busy, or do not go through, then select the number of attempts and frequency.

You can setup the notification, responses, redial, and logging properties for various call conditions.

Options	Description
Conditions	The possible call results are listed on the left. Click any condition in order to view its Response settings. Please remember that not all modems can interpret all of the listed conditions.
Response [Variable]	Specifies how Dialer should handle the call. As various responses are selected, this field will change to a context-sensitive option. For example, if <i>Response</i> is set to "Forward", this option would become <i>Forward to:</i> .
Sound Notification	This sound will accompany the Action. This can be a system sound, a WAV file, or a recorded sound. Click the microphone to record the notification sound in your own voice.
Redial	Most modems can determine whether a phone line is ringing or busy. DeskTop Set can then redial busy numbers based on these settings - for example, redial a total of 4 times, once every 20 seconds.

- Log Call
Check this box to have Dialer automatically begin logging a call when the person answers the phone. This log contains a call timer, the person's information, and a place to record the subject of the call, as well as your own notes. If this option is checked, you can then override the call logging for individual records, if you wish.
- Log last redial attempt only
Checking this box will not log each redial attempt individually. Instead, it will only log the most recent redial attempt. This will keep Dialer from logging multiple unsuccessful attempts on the same number.
- Dialer window on top
Checking this box will cause Dialer to move on top of all other Windows whenever it is dialing a number. This is useful when Dialer is redialing, so you do not have to search for its window when the call goes through.

Call Routing

These settings tell Dialer how you would like specially formatted calls to be handled. There are two types of calls you may configure: *local calls with long distance prefixes* and *alternative long distance* calls.

This is the list of exchanges within your area code that must be dialed as long distance calls.

Use these buttons to add, remove or edit prefix ranges.

You can specify other area codes to be dialed using least-cost routing.

You can select a custom prefix or suffix for each area code.

Enter a default prefix or suffix to use for all area codes.

This dialog box is used to setup special dialing cases for calls within your area code that require special dialing, or for using alternate carriers for long distance calls.

To identify local calls that require a long distance prefix:

- ◆ Select **File/Dialing Setup...** from the Dialer's menu bar.
- ◆ Click the *Call Routing* tab.
- ◆ Click the **Add** button next to *Local calls with long distance prefixes*.

Enter the exchange(es) which must be dialed using a "1". The exchange is the first three digits of the local phone number; for example, adding the prefix "458" would cause any numbers in your same area code that begin with "458" to be dialed "1-458-xxxx". The most efficient way to use this is to add ranges of exchanges to the list, rather than individual exchanges. For example, if a certain town is considered long distance and that town is assigned the exchanges 555, 556, 557, and 558, you would put 555 in the *From:* field and 558 in the *To:* field. This considers 555, 558, and everything in between as part of your toll list. If you only need to add one exchange, enter that exchange in the *From:* and *To:* fields.

- ◆ Click **OK**. The exchanges appear in the list. These exchanges will now be dialed using the Toll Dialing Format so that they are properly dialed. For more information on Dialing Formats, see "Setting up dialing formats" on page 319.
- ◆ If you make changes in *Setup* that lead to problems, or simply decide you do not like the results, you can instantly start over. Highlight the prefix range you wish to remove and click the **Delete** button at the bottom of the screen.

Specifying *Alternative Long Distance* numbers:

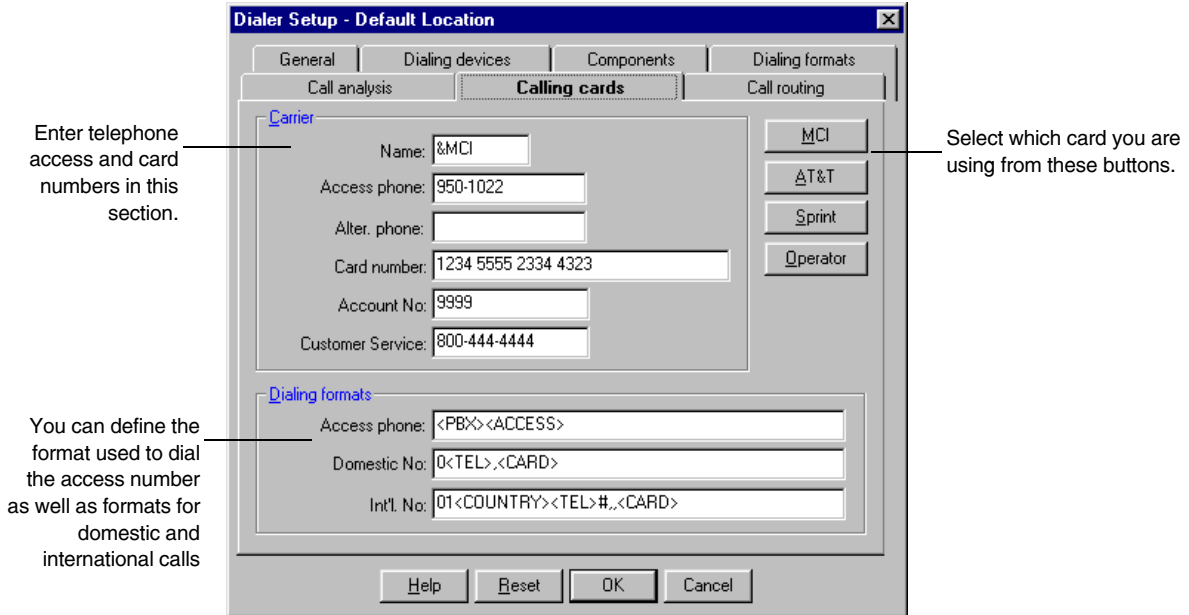
If you use more than one long-distance service, you might notice that calls to certain area codes are cheaper with one service than with another. Dialer allows you to arrange a different long-distance service to use with each area code.

In New Jersey, for example, to make a long-distance call, you must dial the prefix 10288 before the number to use AT&T, 10222 to use MCI, and 10652 to use Bell Atlantic. You may find that MCI is cheapest for calls to the West Coast, and Bell Atlantic is cheapest for calls to New York City. Note that dialing formats must be customized to enable this feature (see "Setting up dialing formats" on page 319).

- ◆ Select **File/Dialing Setup...** from the Dialer's menu bar.
- ◆ Click the *Call Routing* tab.
- ◆ Click the **Add** button next to the *Alternative long distance* list
- ◆ Enter the area code, the special prefix, and the special suffix (if any) you wish to use for numbers in this area code.
- ◆ Click **OK**.
- ◆ If you make changes in *Setup* that lead to problems, or simply decide you do not like the results, you can instantly start over. Highlight the alternative setting you wish to remove and click the **Delete** button at the bottom of the screen.

Calling cards

This screen allows you to set up dialing formats for use with up to three different calling cards. The default calling card formats are preset for MCI, AT&T, and Sprint. They may be replaced with other formats.



Dialer can store your calling card information. When you are out of town, select the calling card dialing format and Dialer automatically places a credit card call.

To enter or edit formats for calling cards:

- ◆ Click the name of a calling card you want to edit.
- ◆ Enter *Carrier* information.
- ◆ For each *Dialing format*, enter the keywords and characters needed.
- ◆ Click on **OK**, or select another tab to save the changes.

Most Hayes-compatible modems can process a command string up to 40 characters in length. Make sure that the number of characters your dialing format creates does not exceed your modem's command buffer.

Carrier	Options	Description
	Name	<p>This is the name of the service provider. It appears on the buttons in this window as well as in dialing format lists. If you look at the default setup, you notice that the MCI button has an underline for the letter M. This means you can use your keyboard to access this button by pressing Alt-M.</p> <p>When you type a new name, put the "&" character in front of the letter you wish to be underlined. Notice that the <i>Name</i> field for MCI has a "&" in front of M, the underlined letter.</p>
	Access phone	This is the number you must dial to access the Calling Card service. If you use AT&T, it is 0. If you use MCI, it is 950-1022. The number you type here is stored in the <ACCESS> field.
	Alter. Phone	If your phone company has a second access phone number, type it here. This number is stored in the <ALTNUM> field.
	Card number	Your Calling Card number. It is stored in the <CARD> field.
	Account No.	Your Calling Card may require you to enter an account or PIN number. You can enter that number here. The entry is for information only and cannot be dialed. If needed, it must be entered manually into the dialing format(s).
	Customer Service	Type the phone number you use to reach the Calling Card operator. This number is dialed when you click the Operator button.
	Operator	When you click this button, the program dials the number in the <i>Customer Service</i> field.

Dialing formats If you are not familiar with how to set up a dialing format, see page 319.

Options	Description
Access phone	Most Calling Cards split the dialing sequence into two parts, separated by a tone. This format is used before that tone.
Domestic No.	If the phone number you are trying to reach is within your country code, this format is used after the tone.
Int'l No.	If you are trying to reach an international number, this format is used after the tone.

To make a call with a calling card:

- ◆ Select a number to dial.
- ◆ Choose the appropriate calling card from the dialing formats list.
- ◆ The access number is dialed and you get the message, "Is Carrier Ready?"
- ◆ Monitor the progress of the call by listening to the modem speaker, handset, or speaker phone.

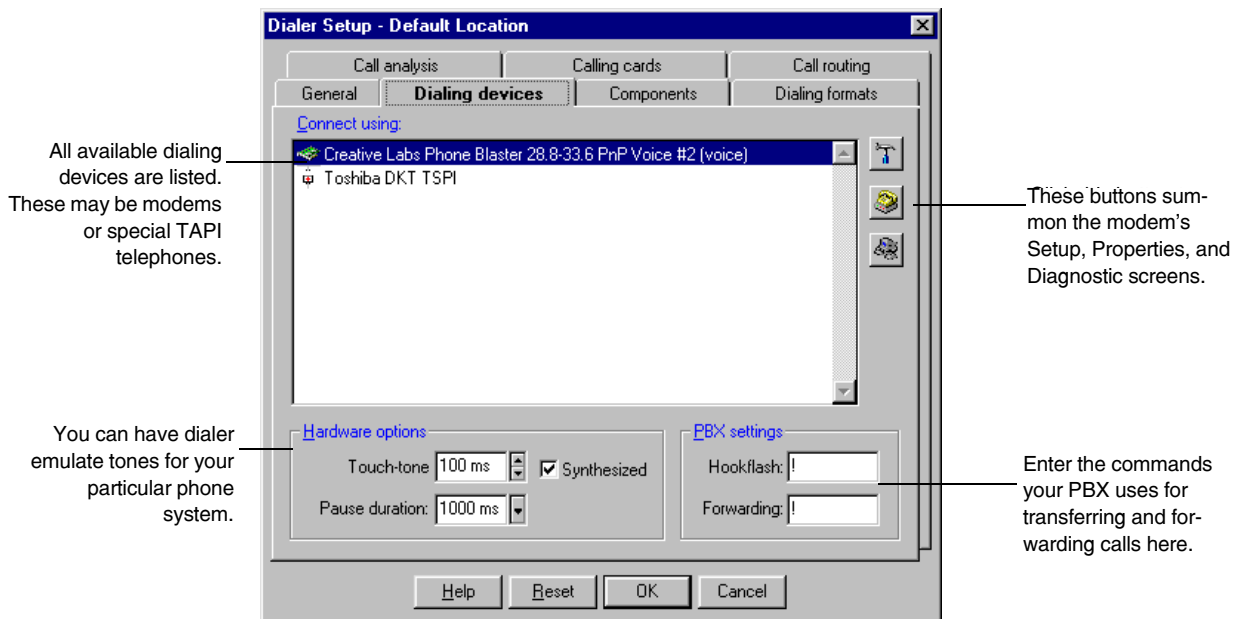
- ◆ When you hear the tone or voice message, click the **OK** button to send the Domestic or International number.

Dialing devices

The *Dialing devices* tab lets you choose which of your installed modems dialer will use. You can also enter custom commands for your particular dialing device, such as for hook flash and call forwarding.

To view your select your the modem to use with Dialer:

- ◆ Choose **File/Dialing Setup** and click the *Dialing Devices* tab.



Windows TAPI will list all available dialing devices. Just select the one you wish to use and make any necessary changes to the PBX settings, or hardware options.

To select one of the listed modems:

- ◆ Click the modem's name in the list of available devices.
- ◆ Click **OK**, or select another tab, to save your changes.

To delete a modem from the list of supported modems:

- ◆ Select the modem from the list.
- ◆ Click the **Modem Properties** button.
- ◆ Click the **Remove** button.
- ◆ Click **OK** or select another tab to save your changes.

Setting hardware and PBX options:

Options	Description
Touch-tone speed	This value is the length of each tone as you dial, in milliseconds. The default is 100, and will work with the majority of phone systems. If your system requires a longer tone, you can set the value here.
Pause Duration	This value controls the length of pauses in your dialing string. A pause is inserted by adding a comma (",") to the string. This is the length of the pause, in milliseconds.
Synthesized	This option should only be used if hookflash and or tones are not being recognized. Some modems send very short tones that cannot be picked up by all systems. Enabling this option allows Dialer to synthesize the sound of these commands, rather than issuing the actual commands and sends a slightly longer tone that is more easily recognized.
Hookflash	This is the command that causes your modem to hookflash. Hookflash is used to switch between calls on a three-party line, or, on some systems, to forward a call. This command is usually "!".
Forwarding	This command issues a call forwarding command by placing the caller on hold and sending the call to another extension. Consult your phone manual or PBX specialist for your specific system's forwarding command.

Viewing Windows' Modem Properties

- ◆ Highlight the modem whose properties you wish to check.
- ◆ Click the **Setup** icon to view Windows' **Modem Properties** dialog box.

Note:

The **Modem Properties** box is not a DeskTop Set diagnostic; this is a Windows 95 feature that can also be run by right-clicking the *My Computer* icon on your Win95 desktop and choosing **Properties**. You can then click the **Device Manager** tab, double-click the **Modem** listing, and select your modem in the list. Finally, click **Properties** to view the Win95 modem settings. Running Windows' modem diagnostic

- ◆ Highlight the modem you wish to check.
- ◆ Click the **Diagnose** icon to view Windows' **Modem Control Panel**.
- ◆ Click the **Diagnostic** tab to view Windows' list of COM ports and their devices.
- ◆ Click **Help** for additional information on Windows' modem diagnostics.

Note:

The *Modem Diagnostic* is not a DeskTop Set feature; this is the Windows 95 feature that can be run by clicking the Windows 95 START menu and selecting Settings/Control Panel, then double-clicking on the *Modems* option.

Pager setup

If you are often out of the office or away from your PC, you can have DeskTop Set page you to inform you of Calendar Alarms, Reminders, and new Messages. Desk-Top Set supports paging to the following types of services:

Numeric local Use this if you have a pager that only accepts numeric characters, and can be dialed directly as if you have your own phone number.

Digital service Also supports only numeric characters, but requires that you first dial a main phone number, followed by a PIN number or access code.

Alpha-numeric These pagers can receive short messages (usually up to 80 characters) consisting of both letters and numbers. You must have either Notify! (from ExMachina: 212-843-0000) or WinBeep (from Integra Technology: 800-842-8395) installed and functioning properly on its own before attempting to send alpha-numeric pages from DeskTop Set.

To access the pager setup:

- ◆ Select **File/Pagers setup...** from the Dialer's menu bar.

Enter the pager description and type here.

You can define a second pager for use on weekend, evenings, or emergencies.

If your pager service has assigned you a PIN number, enter it here.

When using an alphanumeric pager, you will need to select one of these programs to send pages through.

You can send pages from all DeskTop Set modules. This dialog box is used to setup the default properties for your pagers.

Options	Description
First / Second Pager	You can set up two different pagers. You may, for example, carry a work pager during the day, and a personal pager at night. You can set both pagers up here, and set DeskTop Set to dial the appropriate one in a particular situation.
Name	You can name each pager, for example, "Work" and "Personal". This makes it easy to distinguish between them when setting up paging scenarios.
Type	There are three types of pagers: numeric local, numeric service, or alphanumeric. This setting decides what information Dialer will need to complete the call. If you choose Numeric Local, you will be prompted for the pager's number. If you choose Numeric Service, you will be prompted for the service's phone number, and the pager's number. If you choose Alphanumeric, you will be prompted for the Subscriber's phone number.
Try to send	You can specify how many attempts are made on each pager. This is useful if you get a busy signal from the paging service, or if you wish to send multiple pages to be sure they are received.
Program to use for alphanumeric paging	Dialer can send digital pages easily. If you prefer to send text messages to an alphanumeric pager, you will need third-party alphanumeric paging software. This option allows you to select Notify or WinBEEP software.

Setting up Speed-dial pads

Dialer has three types of Speed-dial pads. The first is the numeric pad you see the first time you start Dialer, with numbers and emergency buttons. This is similar to the numeric pad on standard telephones.

The second is a group of speed-dial buttons. Dialer can store frequently-dialed names and telephone numbers on speed-dial buttons.

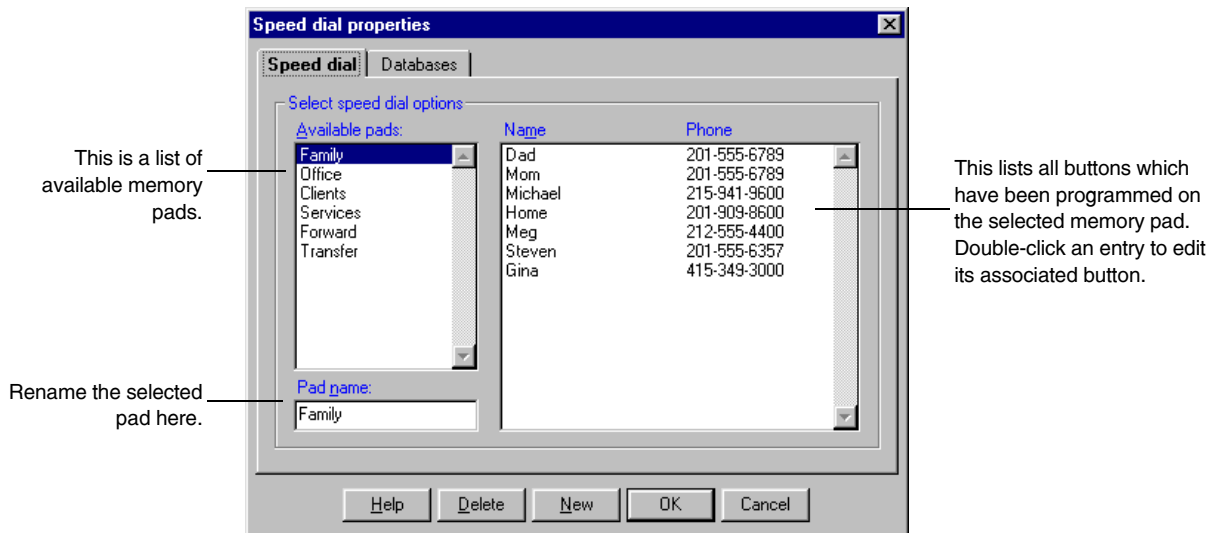
The third type of pad displays a list. This can show your phone log, pending calls, or address book entries.

You may create as many Speed-dial pads as you wish. Opening them can be done quickly with Speed-dial tabs. You might store business numbers on one pad, personal numbers on another, service numbers on another, etc. You may click on any tab to open its related page.

Creating a
Speed-dial pad

To create a new speed-dial memory pad:

- ◆ Select **File/Speed-dial setup...** from the menu. The *Speed-dial properties* window appears.



You can use the dialog box to configure Dialer's speed-dial pads.

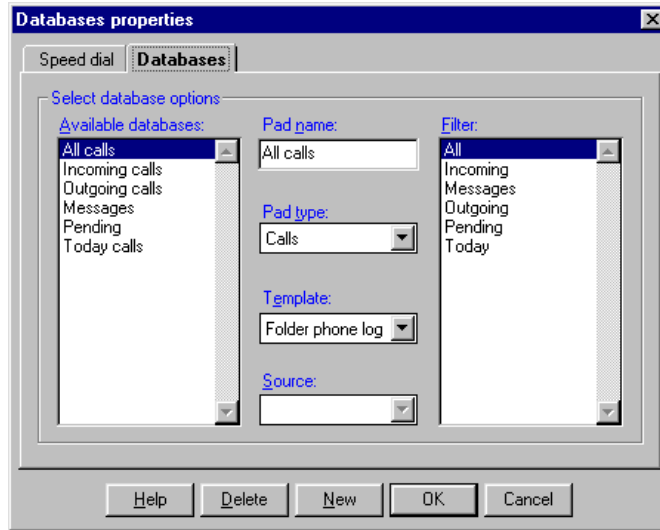
- ◆ Click the **New** button. Type the name of the new pad under *Memory pad name*.
- ◆ Click **OK**. Your new pad is ready to use.

To use your new Speed-dial pad:

- ◆ Right-click any of your Speed-dial tabs.
- ◆ Under the list of options for the *Right Pad*, select your new Speed-dial pad.
- ◆ Click **OK**. You can now add entries to you new pad.

To create a new list pad:

- ◆ Select **File/Databases Setup...** from the menu. The *Database properties* window appears.



- ◆ Click the **New** button. Type the name of the new pad under *List pad name* and click **OK**.
- ◆ Select the list type you want from the *Pad type* drop-down list:

List Type	Description
Calls	Displays a list of calls. You can select a list style under <i>Template</i> , and a Filter if you choose to see only certain types of calls (such as Today's calls).
Book database	Displays an address book in List View. You can select a list style under <i>Template</i> , and choose the book you wish to view from the <i>Source</i> list.
Topic, Group, or Category	Will display the members of a Topic, Group, or Category. You can choose a list style under <i>Template</i> , an address book under <i>Source</i> , and a particular Topic, Group, or Category under <i>Subject</i> .

- ◆ If you selected a book, topic, group, or category list, select which address book to use from the *Source* drop-down list.
- ◆ Select the list template you would like to use from the *Template* drop-down list.
- ◆ Click the appropriate subject or filter from the right-hand list.
- ◆ Click **OK**. Your new pad appears in the *Memory Pads properties* window's pad lists.

To open a Speed-dial pad:

- ◆ Select **View/Select pad...** from the menu.
- ◆ Highlight the Speed-dial pad you want to open and click **OK**.

Programming speed-dial buttons

To program a speed-dial button:

- ◆ Click a blank button **or...**
- ◆ Click an existing button and select **Edit/Edit button...** from the menu.
- ◆ Enter the appropriate name, telephone, extension, and dialing format information. The button's text cannot contain digits or hyphens.

To program a speed-dial button with a link to Address Book:

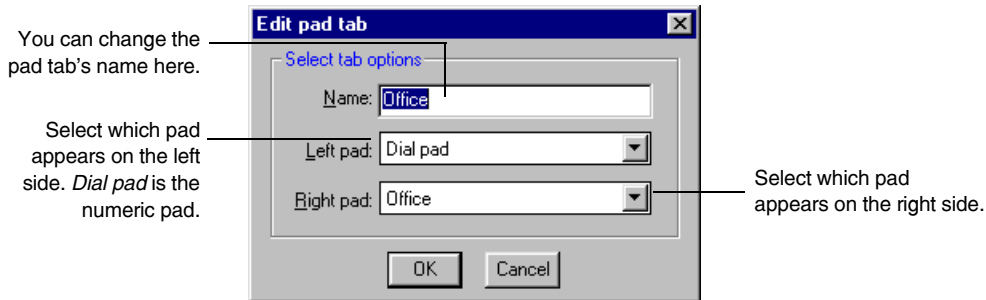
- ◆ Drag a name from Address Book and drop it on a blank pad button.
- ◆ The phone number appears on the Dialer's display and the name appears on the pad button. You can right-click the button to view the entry's other phone numbers.

Customizing Speed-dial tabs

Speed-dial tabs let you open Speed-dial pads with one click. Each tab can be assigned two pads; one for the left side and one for the right.

To customize a Speed-dial tab:

- ◆ Click on the tab you would like to edit.
- ◆ Select **Edit/Edit tab...** from the menu. The *Edit tab* window appears.
- ◆ Under *Left pad*, select which Speed-dial pad you want to appear on Dialer's left side.
- ◆ Under *Right pad*, select which Speed-dial pad you want to appear on Dialer's right side.
- ◆ If you select the same list pad for both the left and right sides, that one list is displayed uninterrupted across Dialer's width.



You can customize all twelve dialing tabs to show any combination of two different pads.

Using Voice Recorder

You'll find the Voice Recorder commands throughout DeskTop Set's Dialer. You can, for example, record custom messages to be played back when you reach someone's voicemail. If you use Dialer's Answer Bar, you'll use this feature to record custom greetings, prompts, and hold messages, as well as announcements for when calls are received or forwarded.

DeskTop Set's Voice Recorder works very similarly to other recording utilities, and you'll likely find it easy to use the very first time you need it. The following section explains each of Voice Recorder's options and menus, as well as how to control the way in which your voice is recorded.

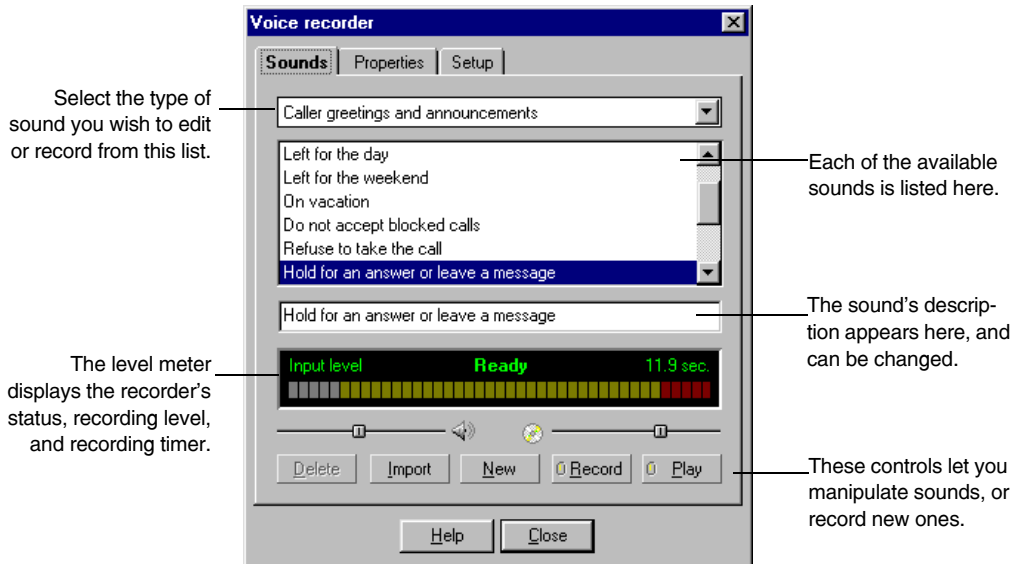


You can start the Voice Recorder from any DeskTop Set module wherever you see the microphone icon (shown at left). To use this feature, you must have a sound card or voice modem properly installed. (You should also verify that you can properly record sounds on your system using the Windows *Sound Recorder*).

Voice Recorder Options

To view the Voice Recorder from Dialer:

- ◆ Choose File/Record Greetings from the Dialer's menu bar.
- ◆ The Voice Recorder will appear.



The Voice Recorder's Record utility, Properties, and Setup screen can be reviewed from this single window

Sounds

The **Sounds** tab allows you to choose the type of sound you wish to review or edit, and lists all the sounds in that particular category. You can play any sound in the list, or record a new sound using the controls at the bottom of the window.

To list a particular type of sound:

- ◆ Click the drop-down list at the top of the window.
- ◆ Select the type of sound you wish to review or record from the list.

To play a particular sound:

- ◆ Click the sound's description in the list.
- ◆ Adjust the speaker volume using the Sliding Control.
- ◆ Click the **Play** button.

To record a new sound:

- ◆ Select the type of sound you wish to record from the drop-down list at the top of the window.
- ◆ Select the recording quality using the sliding control at the bottom of the window. Remember: higher quality sounds require more disk space than lower quality sounds.
- ◆ Click the **New** button, and enter a description for this new sound in the window that appears.
- ◆ Click the **Record** button.
- ◆ Depending on your other Voice Recorder settings, you may have a slight pause before recording begins, and a voice may prompt you to get ready to record (see "Setup" on page 340).
- ◆ After the tone, begin speaking into your microphone.
- ◆ Recording will stop when you reach the maximum recording time (which can be set in the **Setup** tab) or when you click the **Stop** button.
- ◆ You can then click **Play** to hear the newly recorded sound.

Note:

The prerecorded messages and greetings that are included with DeskTop Set were prepared in a professional recording studio. The sounds that you record yourself may not sound as clear or loud as those included with DeskTop Set.

To increase the quality of your own recordings, we recommend using a specialized program, such as *Creative WaveStudio* (included with most Sound Blaster audio cards), to edit the WAV files you record in DeskTop Set. These utilities generally have options for increasing or amplifying the volume (Select **Special/Amplify Volume...** in *WaveStudio*). You can then use the Sound Recorder's import feature to add them to DeskTop Set.

To use a sound that is already saved on your system:

- ◆ Select the type of sound you wish to record from the drop-down list at the top of the window.
- ◆ Click the **New** button, and enter a description for this new sound in the window that appears.
- ◆ Click the **Import** button. The *Sound files browser* window will appear:

File names appear here, along with the DeskTop set description (if applicable).

Checking this option will cause each sound to be played as it is clicked in the list above.

You can select sound files from network drives, as well.

This list of directories lets you navigate your system to find a sound.

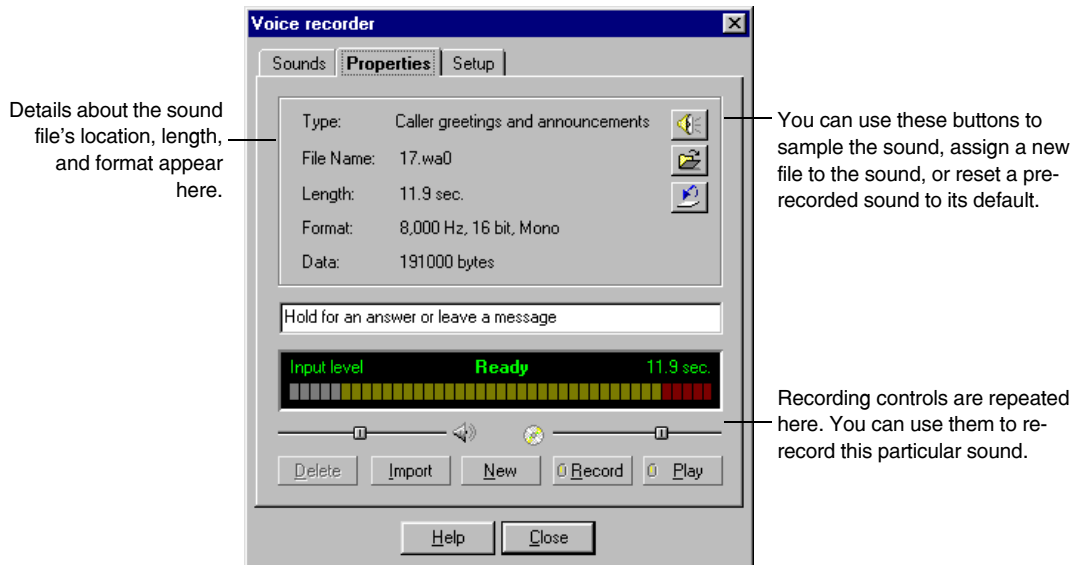
You can assign any sound on your system to be used as a DeskTop Set sound. Click the Import button, and use this browser to select the sound file.



- ◆ To sample any sound file on the drive, click its name, and click the speaker to sample the sound.
- ◆ Use the Directories listing on the right to navigate your system and find the sound file you wish to use.
- ◆ Once you've found the file you wish to use, highlight it and click the **OK** button.
- ◆ Confirm that you wish to assign this sound to DeskTop Set.

Properties

The *Properties* tab displays detailed information about a particular sound.



The Properties tab contains a sound's details, and lets you re-record the sound, if necessary.

To view a sound's properties:

- ◆ Select the sound on the *Sounds* tab.
- ◆ Click the *Properties* tab.

To play the sound:



- ◆ Click the speaker next to the sound's Type.

To change the file name the sound is stored in:



- ◆ Click the folder next to the sound's File Name.
- ◆ Select a new sound file to play for this sound.

To reset a particular sound to its default voice:



- ◆ Click the Reset button next to "Reset to Voice".
- ◆ Click **Close** to return to the Dialer.

To change the sound's description:

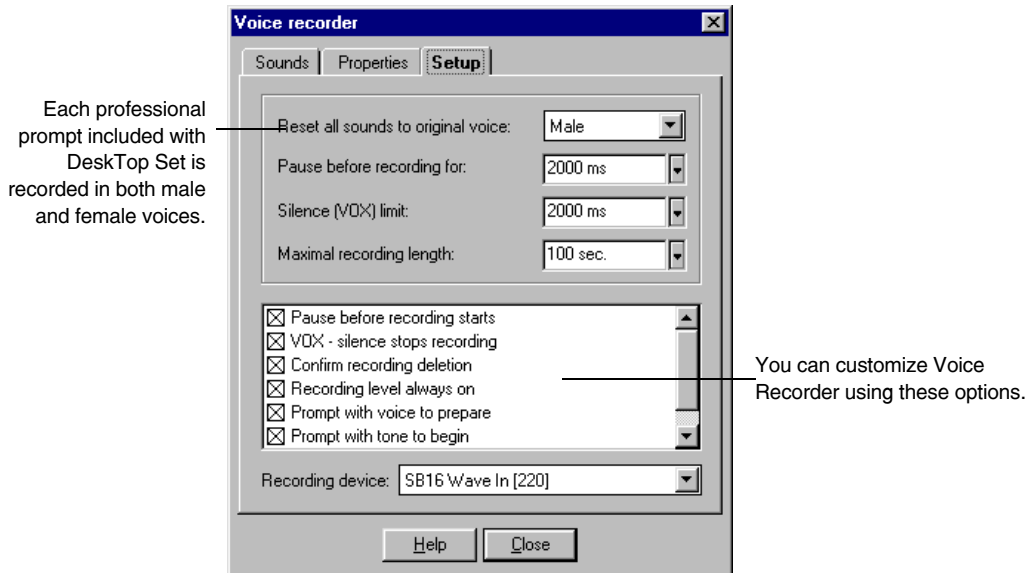
- ◆ Highlight the description.
- ◆ Make your changes and click the **Close** button.

To re-record the sound:

- ◆ Select the recording quality using the sliding control at the bottom of the window. Remember: higher quality sounds require more disk space than lower quality sounds.
- ◆ Click the **Record** button.
- ◆ Depending on your other Voice Recorder settings, you may have a slight pause before recording begins, and a voice may prompt you to get ready to record.
- ◆ After the tone, begin speaking into the microphone.
- ◆ Recording will stop when you reach the maximum recording time (which can be set in the **Setup** tab) or when you click the **Stop** button.
- ◆ You can then click **Play** to hear the newly recorded sound.

Setup

You can choose Voice Recorder's setup options. These settings affect all sounds that are recorded with the Voice Recorder.



The Setup tab controls how sounds are recorded, and how the professional prompts are played.

To edit the Voice Recorder's Setup options:

- ◆ Click the **Setup** tab.
- ◆ Change any of the options.
- ◆ Click the **Close** button, or another tab, to save the changes.

The following options are available on the **Setup** tab:

Option	Description
Reset all sounds to original voice	Voice Recorder includes professionally recorded voice prompts which you can use. These prompts are recorded in both a male and female voice. This option selects which voice the sound is played in. This option is only available if you've chosen to install the professional prompts.
Pause before recording for	Voice Recorder can be set to pause between the time you click the Record button and the time recording begins. If this option is selected below, you can set the length of this delay, in milliseconds, here.
Silence (VOX) limit	You can choose to have Voice Recorder automatically stop recording when you stop speaking (see "VOX - silence stops recording" below). Use this option to control how long you must be silent for before the recording stops.
Max. recording length	This option sets a maximum recording length, in seconds. When this time limit is reached, recording will stop. Since recordings do require disk space, this is useful as a reminder to keep your messages short.
Remove pauses longer than	Voice recorder can automatically remove pauses as you record a message. Any pauses longer than the value you input here will be removed from the recording automatically when <i>Remove pauses from recording</i> , below, is checked.
Record from:	This options lists all the recording devices installed on your system, and allows you to choose the one Voice Recorder will use. This list is taken from Windows' <i>Multimedia</i> Control Panel.
Optimize recording vol.	When this option is checked, Voice Recorder will automatically boost your voice to normal recording volume as it records. Enabling this option will produce superior recordings on most systems.
Removes pauses from recording	When this option is checked, pauses longer than the time you've set in <i>Remove pauses longer than</i> , above, will be removed from the recording.
Compress voice messages	Checking this option will compress callers' messages, so that they take less space on your hard drive. (You may notice a slight degradation in sound quality if this option is checked).
Pause before recording starts.	This option pauses slightly between the time you click the Record button and the time the recording actually starts, giving you time to prepare to speak.

VOX - Silence stops recording	Checking this option will automatically stop the recording when you stop speaking. This is useful if you would prefer not to have to click Stop to stop the recording.
Recording level indicator always enabled	Checking this option causes your microphone to be “on” at all times, even when you are not recording. This causes the level meter on the Voice Recorder’s display to register. This is useful if you wish to test the volume of the recording (on the colored volume meter) before actually recording.
Prompt with tone to begin	This option will play a tone just before the recording begins, prompting you to begin speaking.
Confirm recording deletion	When this option is checked, you will need to click the Delete button twice to delete a sound. This prevents you from deleting messages or greetings by mistake. How quickly you must click to delete the sound can be set above (see “Wait for erase confirmation” above).
Prompt with voice to prepare	When this option is checked, a voice will prompt you to “Get ready to record” just before the recording begins.

Answer Bar

DeskTop Set’s Answer Bar is a breakthrough in voice mail technology. Its most convenient innovation is that it is *situation-aware*: it handles callers differently based on whether you are in, on vacation, in a meeting, or at another location. You set your availability, or *Mode*, with a single click, and you can create as many different modes as you need. Each mode contains unique parameters for greeting your callers, taking their messages, transferring or forwarding them, and logging their calls, so they are handled exactly as you need them to be, depending on your availability.

Answer Bar’s most powerful benefit is that it is integrated with Address Book, so that Answer Bar can actually recognize who is calling based on their CallerID information (or, if this is not available, by the information the callers enter using their touch-tone telephone). You can greet callers with a situation-dependent message, have certain callers forwarded to your cell phone, or leave important messages that they can retrieve when they call in. By designating callers as standard, priority, or code access, you can provide a way for your most important callers to reach you no matter where you are.

Since these people already appear in your address book, their calls and messages are automatically logged into their Folder, so you have a complete call history at your disposal:

- ◆ When you call in to DeskTop Set-by-Phone for your messages, you receive a complete message including who called, where they called from, and their message.
- ◆ When you are available, Answer Bar lets you know when a call comes in, and announces who is on the line. You can then screen the call, accept it, or have Answer Bar handle the call automatically. Professionally recorded messages are included, and you can also record your own or use the built-in text-to-speech option. You have complete control over how long callers stay on hold, and what messages and options they are given.

Answer Bar is an extremely powerful and very flexible call management system. It takes an ordinary phone line and turns it into a feature-packed phone system.

What you'll need

In order to use Answer Bar, you will need the following:

- ◆ A Unimodem/V-compatible voice modem with CallerID capability (optional).
- ◆ CallerID and Three-way calling services from your local phone company (optional).
- ◆ A Sound Card, Speakers, and a Microphone.
- ◆ Windows 95 or NT (if you wish to use Answer Bar's text-to-speech capability).

The Unimodem/V driver is developed by Microsoft. DeskTop Set works with this driver to access your voice modem's capabilities. If you do not already have the driver, you can install it from the DeskTop Set CD-ROM.

Your modem's user guide, or the manufacturer's technical support department, can tell you whether or not your modem is Unimodem/V compliant. If you are considering purchasing a new modem, Okna's Technical Support department can provide you with a list of modems that are easy to install, and work well with Answer Bar.

To install the Unimodem/V driver under Windows 95:

- ◆ Place the DeskTop Set CD-ROM in the drive.
- ◆ If the CD does not run automatically, open the CD and double-click the **Auto-run.exe** file to run the Install utility.
- ◆ From the menu that appears, select the option to *Install Unimodem/V drivers...*

To install the Unimodem/V driver under Windows 3.1:

Before you can use the DeskTop Set Dialer under Windows 3.x, you will need to install the Microsoft Windows 3.x TAPI drivers.

Please note that DeskTop Set's Answer Bar and DeskTop Set-by-Phone features depend on the ability to play text-to-speech messages through your voice modem, and Windows 3.x does not provide this capability. You will, however, be able to place

calls through DeskTop Set's Dialer and, if you have a voice modem, use the Dialer as a hands-free speakerphone.

To install the Microsoft TAPI drivers on a Windows 3.1, 3.11, or Windows for Workgroups system:

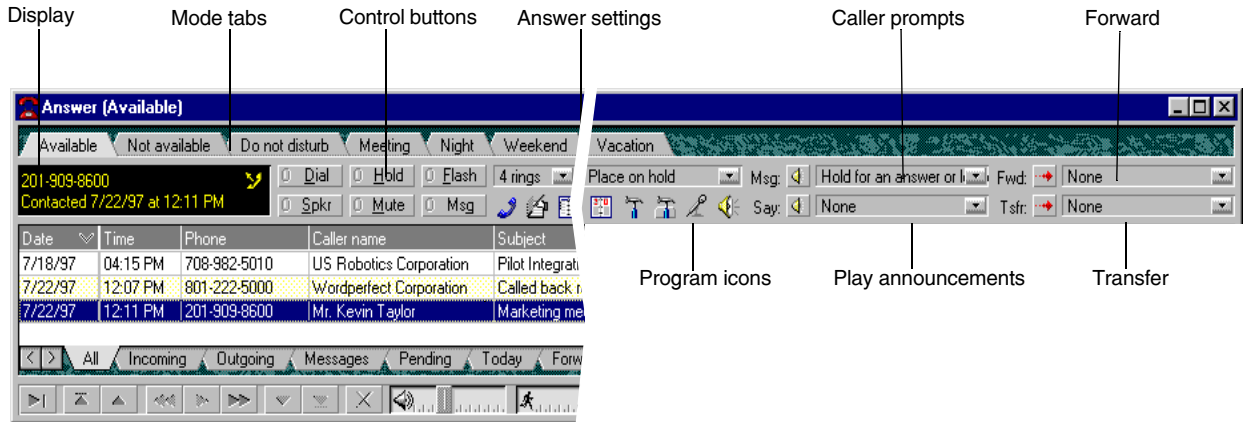
- ◆ Run File Manager.
- ◆ View the contents of your CD-ROM drive.
- ◆ Open the TAPI16 directory.
- ◆ Double-click TAPI16.EXE to run this utility. The Windows 3.x TAPI drivers will be copied to your system.
- ◆ Return to Program Manager and open the Control Panels. You will notice a new *Telephony* Control Panel. Double-click it to open it.
- ◆ Click the **Driver Setup...** button.
- ◆ In the *Telephony Drivers* window, click the **Add** button.
- ◆ Select the "AT Command Set Modem Telephony SP" entry in the Telephony Drivers listbox and click the **Add** button.
- ◆ In the *ATSP Configuration* window, set the *Communications Port* to the COM port your modem is connected to, and set the *Speed (DTE Rate)* to the modem's baud rate.
- ◆ Click **OK**, then **Close** to return to the *Telephony* Control Panel.
- ◆ Click **Location Setup**.
- ◆ In the *Locations* window, check that "Default Location" is highlighted in the list of *Defined Locations*. If it is not, click it so that it is highlighted.
- ◆ Click the **Edit** button.
- ◆ Select your current country code in the *Country Code* list, and enter your area code or city code in the *Area Code* field.
- ◆ Click **OK**, then click **Close** twice to exit the Control Panel.

Now that the *Telephony* Control Panel is configured, run the Windows Dialer (a Program Manager icon should now appear for this application. If it does not, choose File/Run from Program Manager, and run C:\Windows\Dialer.exe.)

You should find you are now able to use the Windows Dialer to make calls. This means that the above procedure was successful, and that the DeskTop Set Dialer should also work well. If you receive any error messages, or if the Windows Dialer does not work properly, please refer to the README.TXT file in the main (root) directory of the DeskTop Set CD-ROM.

Answer Bar Features

How your calls are handled is largely determined by what *mode* you are in: for example, *Available*, *In a meeting*, *Out for the day*, *On vacation*, *Out to lunch*, etc. In order to switch from one mode to another, you simply click from one *mode tab* to another. Each of that mode's options are displayed on the tab, and can be edited by clicking the **Setup** button. Here is how the Answer Bar appears:



Answer Bar, shown with the list of calls displayed and hidden. The Filter Tabs below the list let you see only certain types of calls. The Msg button displays (or hides) the list.

Option	Description
Display	Shows your current mode, the status of your calls, the number of waiting messages, and the current date and time (or call timer, when calls are in progress). When an incoming call is recognized by callerID and found in your address book, you will see the caller's name and number here.
Mode tabs	Select your current status by clicking on one of the tabs (<i>Available</i> , <i>Unavailable</i> , etc.). You can setup additional tabs for other modes, as well. To edit any mode's settings, just right-click its tab.
Control buttons	Control calls just by clicking. Turn the speakerphone on or off, place the call on Mute or Hold, or check your messages - all with a single click.
Answer settings	Set the number of rings before Answer Bar picks up the call. You can also override the current Mode's settings: for example, if you are <i>Available</i> , and CallerID shows a caller that you do not wish to speak to, you can select <i>Take message</i> from the Action list.

Caller Prompts	Selected a pre-recorded prompt and click the speaker icon to override the current answer bar settings for answering calls. The message will play, then Answer Bar will perform the currently selected Action, such as <i>Hold</i> , <i>Transfer</i> , <i>Take message</i> , or <i>Disconnect</i> .
Forward	You can select from a list of people to forward the call to (for a caller to appear in this list, they must be listed on the Dialer's <i>Forward</i> tab: see "Speed-dial tabs" on page 303 for further details).
Program icons	Run any DeskTop Set application with a click. You can also log an incoming or outgoing call, open a person's Folder, record a new greeting, or set Answer Bar's options.
Play announcements	Selected a pre-recorded message and click the speaker icon to override the current answer bar settings for answering calls. The message will play, then the line will be disconnected. You can also use this to play messages to callers on hold, such as, "I'll be right with you, please continue holding."
Transfer	You can select from a list of people to transfer a call to another extension (for a caller to appear in this list, they must be listed on the Dialer's <i>Transfer</i> tab: see "Speed-dial tabs" on page 303 for further details).

Using Answer Bar

Once you've set Answer Bar's options, it will run in the background, and answer your calls as they come in. Depending on the options you've set, callers will be announced to you, and you will have the opportunity to let Answer Bar handle the call according to the current Mode's settings, or take control of the call manually.

Turning Answer Bar On and Off

Answer Bar's auto-answer can be turned on or off from Dialer:

To turn Answer Bar on and off:

- ◆ Click the **Auto** button on Dialer's display.
- ◆ Answer Bar will auto-answer when this button is lit. When this button is not lit, Answer Bar will not acknowledge or control incoming calls in any way.

Using Answer Bar to Screen Calls

As Answer Bar announces the caller, the person's information will also appear in Answer Bar's display. If you decide that you'd prefer to take the call, you can pick up the phone and choose from the following commands:

Command	Description
<ESC>	If you pick up the handset and press the Escape key on your keyboard, Answer Bar will drop control of the call.
*	Picking up the handset and pressing * will override Answer Bar's outgoing message, or stop its recording of the caller's message. The call will be logged as an incoming call with no message.
#	Pressing # causes the outgoing message to stop. If the caller is already leaving a message, recording will stop. The call will be logged as an incoming call, along with the portion of the message that was left before you picked up.
(no key)	If you simply answer the phone without pressing * or #, Answer Bar will finish playing its outgoing message. You can then begin speaking, and Answer Bar will record the two-way conversation. This recording will automatically stop after the maximum recording time is reached (see "Mailbox" on page 353).

Taking Manual Control of a Call

Once Answer Bar has identified the caller and announced them to you, you may decide to handle the call in any way, regardless of how Answer Bar's current Mode is configured. Answer Bar makes it easy to override the automatic settings and handle the call any way you wish.

To speak with the person:

- ◆ Click the **Spkr** button to activate your hands-free speakerphone **or...**
- ◆ Pick up the phone's handset and press the **Escape** key.

To play a prerecorded message and disconnect the call:

- ◆ Select a prerecorded message from the *Say:* list.
- ◆ Click the speaker to deliver the message and hang up.

To play a prerecorded message and take a predefined action with the call:

- ◆ Select an action from the drop-down list (for example, *Hold*, *Take Message*, or *Transfer*).
- ◆ Select a prerecorded message from the *Msg:* list and click the speaker to play it.

To play a particular message to a caller while they are on hold:

- ◆ Select a prerecorded message from the *Say:* list.
- ◆ Click the speaker to deliver the message and place the caller on Hold again.

Note:

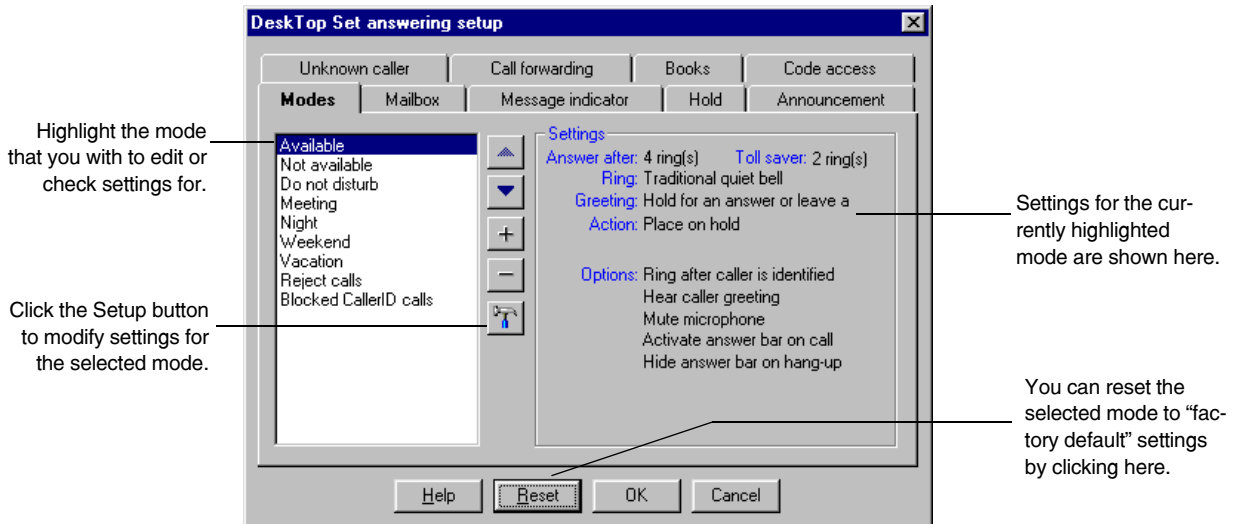
To use Answer Bar, you must have Dialer running with the **Auto** button lit. Answer Bar cannot be run independently from Dialer.

Setting up Answer Bar

The Answer Bar's display lets you see the current answer mode, and its settings, at a glance. To edit the settings for a particular tab, just right-click the tab. Setup is organized into tabs that contain logical groups of settings. You can experiment with different *Announcement* settings, for example, on a single screen. Each individual group of options can then be reset to its defaults, if necessary, without affecting the other Answer Bar options.

To open the setup window:

- ◆ Select **File/Answering Setup** from Dialer's menu **or...**
- ◆ Click the **Setup** button in the Answer Bar's window. The *Answering Setup* window appears:



You see all your modes settings, click the Modes tab.

Modes

The **Modes** tab lets you select the various Answer Bar modes and see, in one place, what actions Answer Bar is set to take.

When using the Answer Bar to monitor incoming calls, you can set up an unlimited number of **Modes** for various situations. You may, for example, have Answer Bar pick up on the fourth ring when you are available, to give yourself time to prepare for the call. When you are unavailable, however, you might prefer to have Answer Bar take a message after the first ring. If you are out of the office, you may choose to have calls transferred to your car. Furthermore, you may wish to set different responses for callers in four different priorities: *CallerID identified*, *Unknown Callers*, *Priority Contacts*, or *Code Access* callers, so that different callers are handled in different ways. When you are on vacation, for example, you can automatically have priority callers transferred to your hotel, while everyone else will be prompted to leave a message.

To access the Modes setup.

- ◆ Right-click on the Mode tab right from Answer Bar, **or...**
- ◆ Click the **Setup** button (if you are not already in the *Answer Bar Setup* window) and select the **Modes** tab.
- ◆ Highlight the mode you wish to view in the list on the left. The settings for callerID-identified callers will appear in the *Settings* area on the right.
- ◆ To view another mode, simply click its name.

To add a mode:



- ◆ Click the **Add** button.
- ◆ Set the options for *Identified*, *Unknown*, *Priority*, and *Code Access* callers.
- ◆ Name the tab under *Mode Name*.
- ◆ Click **OK**.

To delete a mode:



- ◆ Click the mode you wish to remove.
- ◆ Click the **Delete** button to delete the mode.

To edit the settings for a mode:



- ◆ Click the mode you wish to edit.
- ◆ Click the **Setup** button (you may also edit settings for a particular mode by right-clicking on its tab when Answer Bar is running).
- ◆ The **General** tab displays the basic settings for each of the four types of callers. Make any changes here, or click the **CallerID Identified**, **Unknown Callers**, **Priority**, or **Code Access** tabs at the top of the window and make any necessary changes (for more information on *Priority* and *Code Access* callers, see “Assigning people as Priority or Code access callers” on page 352).

Click the tabs to edit settings for a particular type of caller.

You can select a prerecorded greeting, or record your own outgoing message.

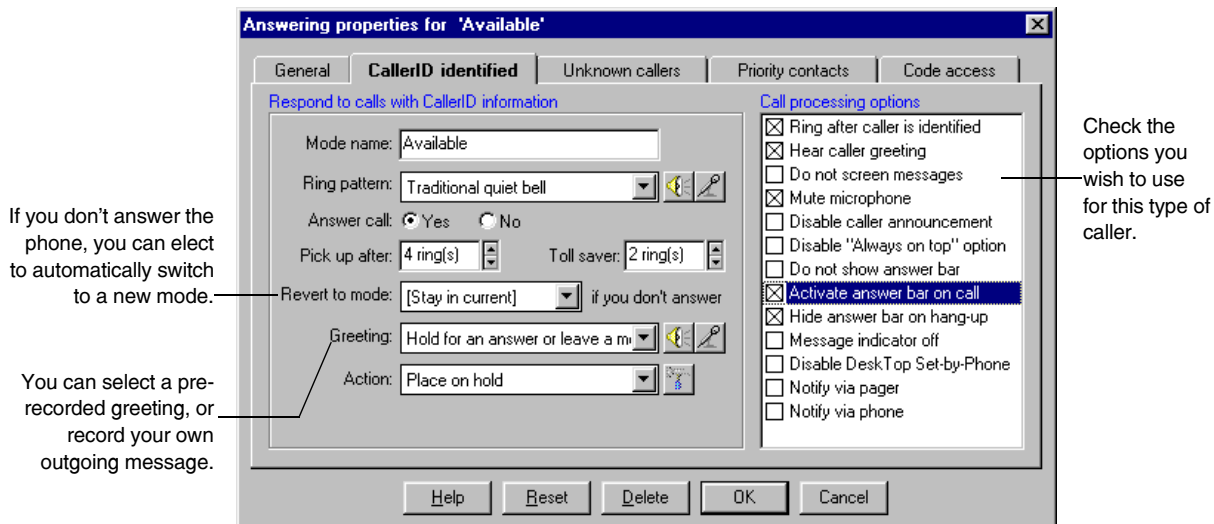
	Answer call:	Pick up after:	Ring pattern:	Greeting:	Action:
CallerID identified	<input checked="" type="checkbox"/> Yes	3	Traditional quiet bel	Hold for an answer or l	Take message
Unknown callers	<input checked="" type="checkbox"/> Yes	3	Traditional quiet bel	This party does not aci	Take message
Priority contacts	<input checked="" type="checkbox"/> Yes	3	Digital quiet bell	Hold for an answer	Place on hold
Code access	<input checked="" type="checkbox"/> Yes	3	Modern quiet bell	None	DeskTop Set-t

After the Greeting is delivered, you can take any action you like with the call.

You can set the basic answering options for the selected mode here. Advanced options can be set by clicking the *Identified*, *Unknown*, *Priority*, and *Code Access* tabs.

To edit all options for a particular type of caller:

- ◆ Click the **CallerID identified**, **Unknown call**, **Priority Contacts**, or **Code Access** tab to view the complete list of options for that particular type of caller:



The tabs let you set the complete list of options for each type of caller. Here, we're deciding how to handle callers who are identified by CallerID when we are in Available mode.

Option	Description
Mode name	You can edit the mode's description here.
Ring pattern	Select a custom ring. Answer Bar will play the sound to alert you to an incoming call. Select a pre-defined sound, or click the microphone to record a new one. Click the speaker to sample the selected sound.
Answer Call	Enables/Disables Auto-answer for the selected class of caller.
Pick-up after	The number of rings to wait before answering the call.
Toll saver	If you have messages waiting, dialer will answer after the specified number of rings. This should be set to <i>less</i> rings than the "Pick up after" option, so that if Answer Bar does not pick up by the <i>n</i> th ring, you know you do not have any messages.
Revert to mode...	When you are available and calls go unanswered, you may opt to have dialer automatically change to a different mode, to take messages for example.

Greeting	Select the greeting the caller hears. Choose from the list of prerecorded messages, or click the microphone to record a new one. Click the speaker to sample the selected greeting.
Action	After the greeting is played, this is how the dialer will process the call, such as: <i>hold, take message, transfer, disconnect, etc.</i>

To reset all modes:

- ◆ Click the Reset button to reset the modes to their “factory” defaults. (Please note that each mode has different default values that are appropriate for that mode).

Assigning people as *Priority* or *Code access* callers *Priority* callers are those people who you wish to receive special treatment when they call in. By assigning someone *Priority* status, you are specifying that their calls are to be handled as specified on each Mode’s *Priority Contacts* tab (for more information on Modes, see “Modes” on page 349).

To assign a person to the *Priority Contacts* list:

- ◆ Open their Address Book Folder.
- ◆ Click the **Record** Tab.
- ◆ Click the **Dialing** Filter Tab at the bottom of the window.
- ◆ In the *CallerID Priority* column, select the person’s priority.
- ◆ Close the Folder. The person’s calls will now be handled according to each Mode’s *Priority Contacts* settings.

Code Access priority should be reserved for the most important of callers. The difference between *Priority* and *Code Access* callers is that *Code Access* callers are assigned a unique code, which lets them receive this priority status no matter where they call from. When *Code Access* callers call in, they press the # key, and enter their password at the prompt. The call is then handled according to the current mode’s *Code Access* settings (for more information on Modes, see “Modes” on page 349).

To assign a person to the *Code Access* category:

- ◆ Follow the same procedure for the *Priority* category, above, **or...**
- ◆ Click the Answer Bar setup’s *Code Access* tab.
- ◆ Click the **Setup** button next to *Mode Name*.
- ◆ Click the **Add** button.
- ◆ Enter the person’s name and password into the appropriate fields. Each person should have a unique code, so they can be identified when they call in.
- ◆ Choose the caller’s custom announcement. You can use a prerecorded message, or text-to-speech.
- ◆ Click **OK**.

For more information on the *Code Access* setup tab, see “Code Access” on page 365.

Unknown Callers

The **Unknown Callers** options control how calls that are unidentified by CallerID are handled. If a call comes in and does not contain any CallerID information, you can request the caller's name and/or telephone number.

Option	Description
Request phone number...	Check this option to ask the caller to enter their phone number using a touch-tone phone.
Request caller name	Check this option to ask the caller to state their name.

To select the messages that request this information, see "Unknown caller" on page 360.

Mailbox

When Answer Bar answers an incoming call and you are not available, the caller can be prompted to leave a message in a variety of ways. You can set the options for how callers are greeted on this tab.

To view the recording options:

- ◆ Click the **Setup** button if you are not already in the *Answer Bar Setup* window.
- ◆ Select the **Mailbox** tab.

Select the pitch and duration of the tone played before leaving a message.

If the caller is silent for a specified period, the call is disconnected automatically.

Just click the microphone button to record your own personalized message, or select from the list of included ones.

Check here to compress incoming messages and conserve hard disk space.

The mailbox settings tab lets you set the options for taking messages.

Option	Description
Announce user name	You can announce your name before playing the message prompt. This is useful when you've selected a generic or prerecorded message prompt that does not already include your name or phone number.
Message prompt	Choose the greeting callers will hear from your list of recordings. Click the speaker icon to sample the selected recording, or click the microphone to record a new message.
Play tone before recording	You can play a tone to prompt the caller to begin speaking. You can set the frequency of the beep, as well as its duration (in milliseconds; 1000ms=1 second).
Limit recording, total of	You can limit the caller's recording time (in seconds) here. Turn the option off by removing the checkmark if you do not wish to limit the recording time. Remember, incoming messages are saved as WAV files which can take up substantial amount of hard drive space if they get too long, or too numerous. It is a good idea to limit the total length of messages to preserve hard drive space.
Compress recording	You can compress incoming messages to conserve hard disk space; however, sound quality will be sacrificed.
Disconnect if silent for over	Answer Bar can detect when a person has stopped speaking. The call will be disconnected when the person is silent for the specified period of time.
"Mailbox is full" message	Choose the greeting callers will hear when your mailbox is full and they cannot leave a message. Click the speaker icon to sample the selected recording, or click the microphone to record a new message

To reset the Mailbox options:

- ◆ Select the *Mailbox Settings* tab.
- ◆ Click the **Reset** button to reset the options to their "factory" defaults.

Message indicator

Answer Bar can audibly and visually notify you when you have new messages waiting.

To open the message indication tab:

- ◆ Click the Answer Bar's **Setup** button.
- ◆ Click the **Message Indicator** tab.



You can control how you are notified, both audibly and visually, of new messages.

Option	Description
Sound tone	You can define the pitch and duration of the tone that alerts you to new messages. Click the speaker button to sample the tone.
Play tone before main greeting	Check this box to have Answer Bar play a tone when it greets you. This provides a quick way to tell whether or not you have new messages waiting.
Show playback controls	Checking this box will display the message playback controls on the Answer Bar, even when the list of message is closed.
Play announcement	You can record an announcement, such as, "New messages waiting!" that will alert you to the fact that you have a new message.
Announce with text-to-speech	If you prefer a text-to-speech announcement, type it hear. Click the speaker to sample the announcement that you have new messages.
Repeat interval	Select the pause between repeats of each tone or announcement, in seconds.

Answer Bar on top	When selected, Answer Bar will automatically move on top of all other windows on your screen whenever you have new messages.
Open message list	You can display your list of messages along with the notification. Check here to open the list automatically.
Flash window	When selected, Answer Bar will flash on the screen to alert you that you have messages waiting.

To be notified by a tone:

- ◆ Click the button next to *Sound tone*, and choose the frequency and the length of the tone.

To be notified with a recorded announcement:

- ◆ Click the button next to *Play announcement*. You can choose a prerecorded announcement from the list, or click the microphone to record a new announcement.

To be notified with a text-to-speech announcement:

- ◆ Click the button next to *Announce with text-to-speech*. Type the message you wish to be notified with. You can then click the speaker to hear the computer announce your message.

To reset the Message Indicator options:

- ◆ Click the **Reset** button to reset the *Message Indicator* options to their “factory” defaults.

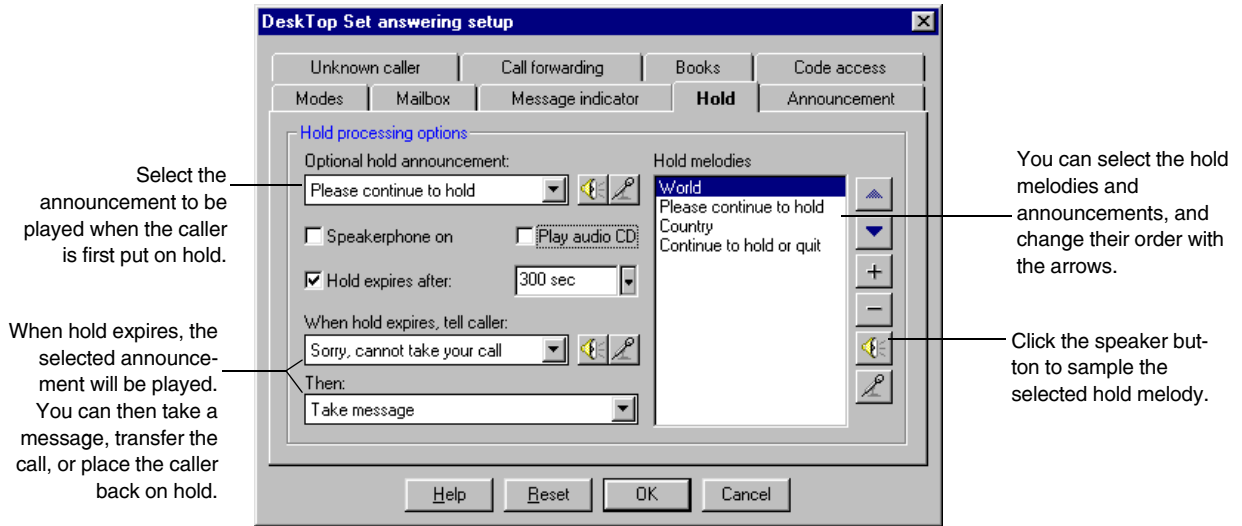
Hold

Answer Bar lets you select the settings for processing callers while they are on hold. You can choose the announcement, how long a caller may stay on hold, and how they are processed after the hold time expires.

When a caller is put on hold, the *Optional hold announcement* plays, followed by the selected *Hold melodies*. After a period of time that you specify, the initial hold period will expire and the *When hold expires* message will play (such as, “Please continue holding,” or “Please leave a message,” and the action specified in the *Then...* pull-down list will take place.

To view the Hold Settings:

- ◆ Select **File/Setup...** from Answer Bar’s menu.
- ◆ Click the **Hold** tab.



You have full control over the messages, melodies, and duration of the hold

Option	Description
Optional hold announcement	Select the initial message that a caller hears when placed on hold, such as, "Please hold, I'll be with you in just a minute." Callers on hold can choose to leave a message at any time by pressing "1"; you may wish to include this information in your announcement.
Hold melodies	You can select any windows WAV file to play when your caller is on hold.
Speakerphone on	You can have your speakerphone turn on automatically as the person is holding, so that you can monitor the line.
Play audio CD	When this option is checked, Answer Bar will use the musical disc in your CD-ROM drive as Hold music.
Hold expires after	Select the time period after which the caller will be taken off hold, and given additional information or instructions.
When hold expires...	You may give callers additional information, or instructions, such as: "Sorry, but I'll be on the phone for longer than expected; please leave a message and I will return your call shortly.", or "Sorry for the delay, please continue holding."
Then...	After the when hold expires message is played, you can select the next action, such as <i>Take message</i> , <i>Transfer</i> , <i>Forward</i> , etc.

To play an announcement when the caller is placed on hold:

- ◆ Select an *Optional hold announcement* from the list, or click the microphone to record a new one. Click the speaker to hear the selected message (if you do not select an *optional hold announcement*, the caller will simply hear the selected Hold Melody).

To play a *Hold melody* while the caller is holding:

- ◆ Select a *hold melody* from the list, and click the speaker to sample the melody. You can add a new melody to the list by clicking the Folder icon and selecting a musical file (WAV) from anywhere on your system.

To set the maximum time a caller may remain on hold:

- ◆ Check the box labeled *Hold expires after*, and enter the number of minutes a caller may remain on hold.

To set the secondary message:

- ◆ Select the message a caller will hear when their time expires, or click the microphone to record a new message. Click the speaker to sample the selected announcement.

To set the action:

- ◆ Select an action in the *Then* box to choose how the call will be handled after the caller is told their time has expired.

To reset the *Hold Settings*:

- ◆ Click the Answer Bar's **Setup** button.
- ◆ Click the **Hold** tab.
- ◆ Click the **Reset** button to reset the **Hold** options to their "factory" defaults.

Announcement

Answer Bar can announce who is calling using text-to-speech. You can create templates to insert the caller's information into the announcement, and you can also specify different announcements to play depending on what information about the caller is available.

To view the *Announcement Settings*:

- ◆ Select **File/Setup...** from Answer Bar's menu.
- ◆ Click the **Announcement** tab.

The list of available keywords that can be used with text-to-speech to announce incoming calls.

Enter a combination of text and keywords to customize the announcement, then click the speaker button to test it.

There are several included text-to-speech voices to choose from.

The announcement tab lets you completely customize the messages that you hear when callers are recognized in address book, or after unknown callers are prompted for information.

Option	Description
Announcement keywords	You can use any of these keywords in conjunction with text-to-speech to customize your announcements.
Announce callers that are found	Select the announcement that is played when a caller is found in one of your address books. Note that the book used for searching must be listed in the Books tab (see “Books” on page 364).
When only callerID is available	When the caller does not appear in an address book, but CallerID information is available, this announcement is played.
When caller was asked for name	When a caller can't be found in the address book, and no CallerID information is present, the caller is asked for their name. They will then be announced using this message.

Information about caller...	If no caller information at all is available, you can play a prerecorded announcement.
Repeat Every	Answer Bar will continue repeating the appropriate announcement. This is the pause between each tone or announcement, in seconds.
Announcement voice	You can choose among a variety of synthesized voices in which to announce your text-to-speech announcements.

To edit any announcement:

- ◆ Type the announcement you wish to hear when the caller is someone who appears in your address book.
- ◆ You can insert any of the available *Announcement keywords* into a text-to-speech message by clicking the field's name and clicking the arrow beside the appropriate announcement.
- ◆ You can set a pre-recorded message by clicking the prerecorded announcement you wish to hear, or clicking the microphone to record a new announcement. Click the speaker to sample the selected announcement.

To reset the *Announcement* options:

- ◆ Click the **Reset** button to reset the *Announcement* options to their "factory" defaults.

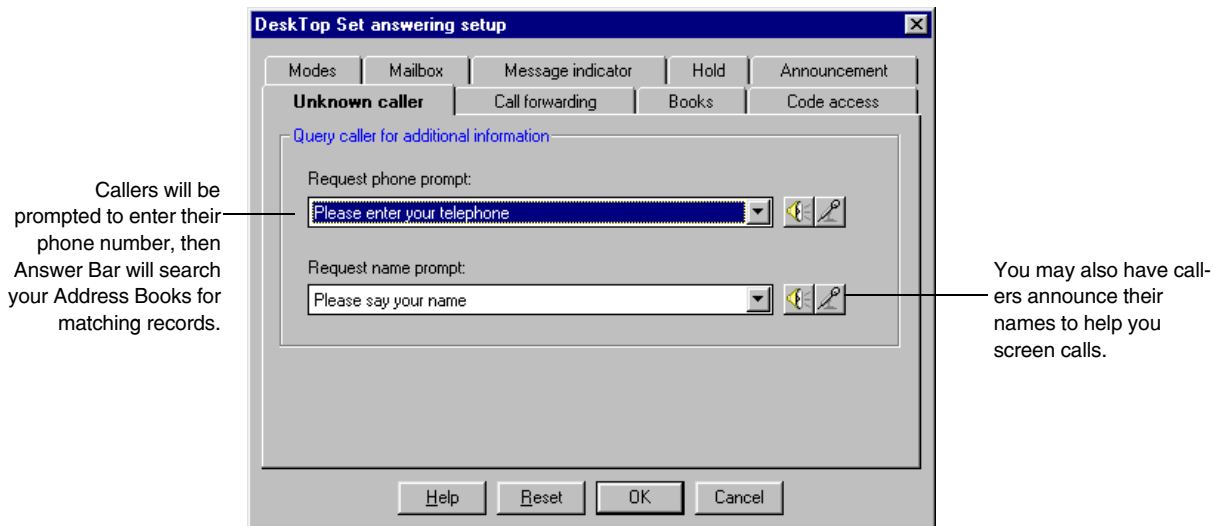
Unknown caller

Unknown callers are those that cannot be identified by CallerID (because CallerID information is not present, has been intentionally blocked, or because you do not have CallerID service or a CallerID-aware modem). You can use the following options to query the caller for additional information to help you decide how to handle the call.

Unidentified callers will then be greeted with your message, asking them to identify themselves by entering their phone number or by saying their name. Answer Bar can then announce the caller based on this information. (*How Answer Bar announces these callers can be set using the **Announcement** tab: see "Announcement" on page 359*).

To setup unknown caller actions:

- ◆ Select **File/Setup...** from Answer Bar's menu.
- ◆ Click the **Unknown Caller** tab.



You can control how callers that are not recognized by callerID are processed.

Option	Description
Request phone	Select a message to play asking the caller to enter their phone number. Click the microphone to record a new message. For information on disabling the request for phone, see "Unknown Callers" on page 353.
Request name	Select a message to play asking the caller to enter their phone number. For information on disabling the request for phone, see "Unknown Callers" on page 353.

To reset the **Unknown caller** options:

- ◆ Click the **Reset** button to reset the **Unknown caller** options to their "factory" defaults.

Call Forwarding

The **Call Forwarding** tab contains options for how callers will be forwarded to you (at home, the office, in the car, at a hotel, etc.). You control how they are placed on hold, and how Answer Bar announces them once the call is forwarded.

To view your call forwarding options:

- ◆ Select **File/Setup...** from Answer Bar's menu.
- ◆ Click the **Call Forwarding** tab.

When you have Answer Bar set to transfer calls, you can customize both the messages that both you and the caller hear.

Choosing the Greeting for callers

You can record an announcement to let callers know they are being transferred, or have the Answer Bar deliver the message using text-to-speech. You can also choose to have no transfer announcement at all.

Option	Description
Greeting for callers	You can play a prerecorded or text-to-speech greeting to inform callers that they're being transferred, such as, "Please hold while I transfer your call to my car phone".

To use a recorded greeting:

- ◆ Click the button next to **Recorded**. You can choose a prerecorded announcement from the list, or click the microphone to record a new one. Click the microphone to sample the selected announcement.

To use a text-to-speech greeting:

- ◆ Click the button next to *Text-to-speech*. Then type the message you would like the Answer Bar to announce in the box to the right.

Choosing how to announce the caller

When the caller is transferred to your current location, you can handle the forwarded call in a variety of ways. The call can simply be transferred, so that you may take the call. You can also control how the person is announced when you answer the forwarded call. If you want to prevent others at your forwarding location from answering your calls, you can choose to have Answer Bar require a password before connecting the call.

Each option can be turned on or off by simply checking (or unchecking) its box.

Option	Description
“Accept Call” prompt	This is the message you will hear when you answer the forwarded call.
Announce Caller/ Use Password	You can announce the caller before accepting the call. If this box is unchecked, you will not hear any information about the caller - they will be connected as soon as you answer the phone. If the <i>Password</i> box is checked, you will have to enter it on a touch-tone phone before the caller will be connected.
If not accepted for... then...	If the forwarded call is not answered in this amount of time, you can elect to take whatever action you choose from this list.
Hang-up if silent for	Answer Bar can automatically terminate the call if both callers are silent for this amount of time. This prevents the modem from becoming “stuck” on a call that has already ended.
Acknowledge Hang-up	This message will give you the opportunity to continue the call by pressing the # key, rather than having Answer Bar hang up due to prolonged silence (see the above option).

To play an additional message (such as instructions for answering the call):

- ◆ Click the box next to *Accept Call Prompt*. Choose which prerecorded message you would like to play, or click the microphone to record a new one. Click the speaker to sample the selected message.
- ◆ If you do not wish to play an additional message, such as “*Press # to answer, or * to take a message,*” uncheck the box.

To require a password:

- ◆ Click the box next to *Use Password*. Type the password into the box on the right, for example, 83925. You will need to enter this password in order to take a forwarded call. Your password must be 8 digits or less.

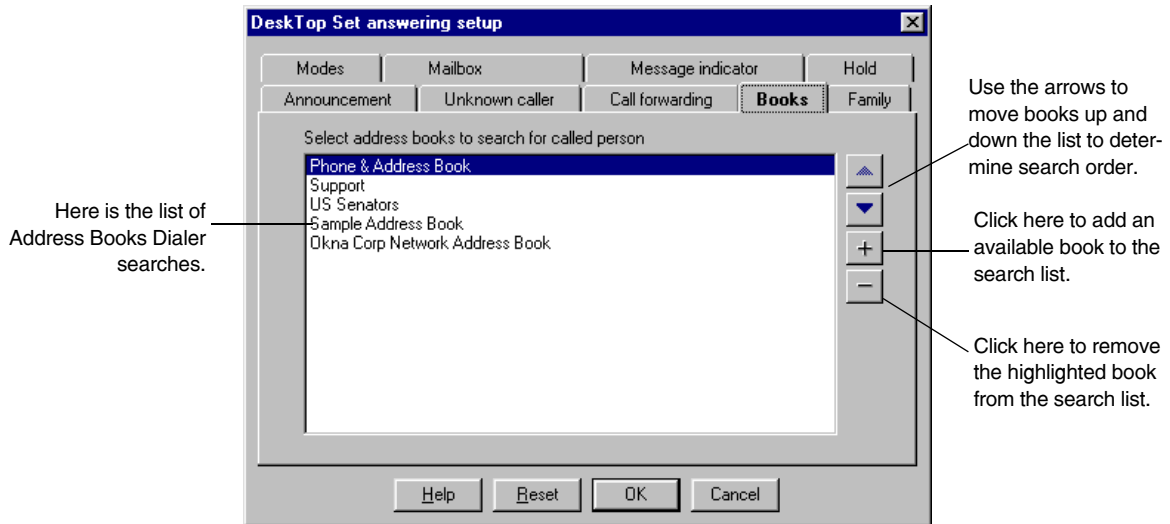
- ◆ If you do not want to require a password in order to accept the forwarded call, remove the checkmark from the associated box.

Books

Whenever Answer Bar begins processing a call, it looks to see whether the person who is calling is someone you know by looking for that person in your Address Books. You specify which of your books Answer Bar will search.

To edit the Book to the Search list:

- ◆ Select **File/Setup...** from Answer Bar's menu.
- ◆ Click the **Books** tab.



You can search Address Book for all records containing the phone number for an incoming caller. Select the books to search above.

To add an Address Book to the Search list:

- ◆ Click the **Add** button.
- ◆ Select the book you would like to add.
- ◆ Click the **Select** button.

To delete an Address Book from the Search list:

- ◆ Select the book you would like to delete
- ◆ Click the **Delete (-)** button.

To specify the order in which the books will be searched:

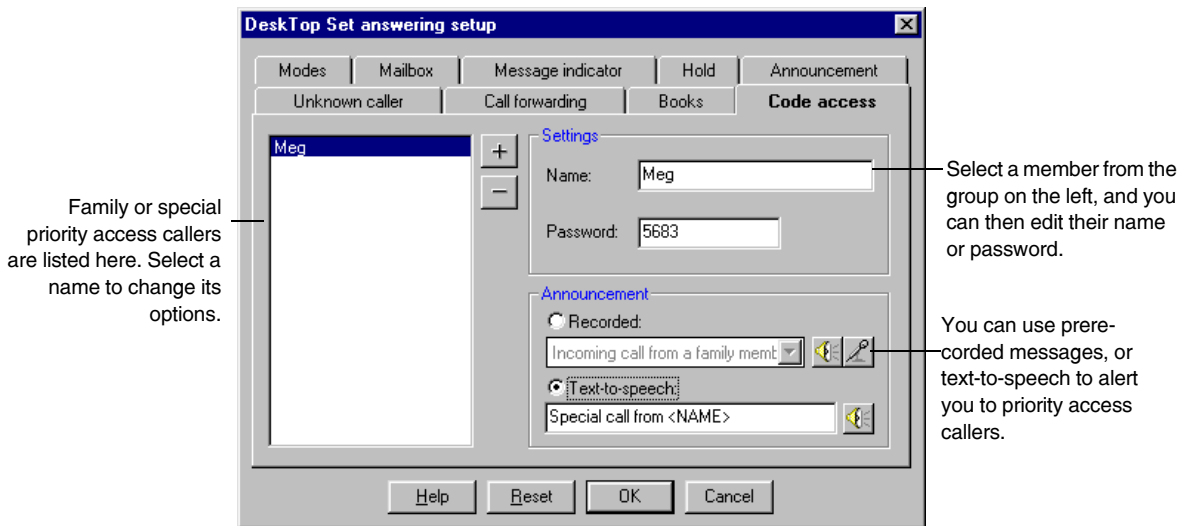
- ◆ Select the book you would like to move and click the arrows to move it up or down. The first book will be searched first, etc.

Code Access

The **Code Access** tab lists those people who you want to receive top priority when they call in. Callers listed here are assigned a code, which can be entered when Answer Bar takes their call. This code identifies the caller from wherever they are calling from, and handles the call as you've specified in the **Caller Access** tab for the currently selected **Mode** (see "To edit the settings for a mode:" on page 350),

To edit the Code Access list:

- ◆ Select **File/Answering Properties** from Dialer's menu or...
- ◆ Click the Answer Bar's **Setup** button.
- ◆ Click the **Code Access** tab:



You can create a group of code access callers that will receive priority access to private messages left for them based on their password.

Option	Description
Caller List	Code Access callers are listed here. You can select a name from the list to check its current settings.
Name	Enter the name of the person here.
Password	Each person has their own unique number to override your standard settings, and identify them as a code access member. The code must be 8 digits or less.

Announcement If you would like to be notified when the selected person calls, select one of the announcement options. You can then choose the type of announcement in the section below (if you prefer that the person ring through without being announced, select the *Recorded* option, and choose *None* from the list.

You can record a special message to notify you that an access code caller is on the line, such as, "You have a call from a family member".

You may also use a slightly more generic message that combines text with keywords to form personalized messages, such as, "Code access call from <insert name>".

To add a person to the *Code Access* list:

- ◆ Check the ***Add*** button.
- ◆ Enter the person's name and access code into the appropriate fields. Each person should have a unique code, so they can be identified when they call in.

To reset the *Code Access* options:

- ◆ Click the Answer Bar's **Setup** button.
- ◆ Click the ***Code Access*** tab.
- ◆ Click the **Reset** button to reset the ***Code Access*** settings to their "factory" defaults.

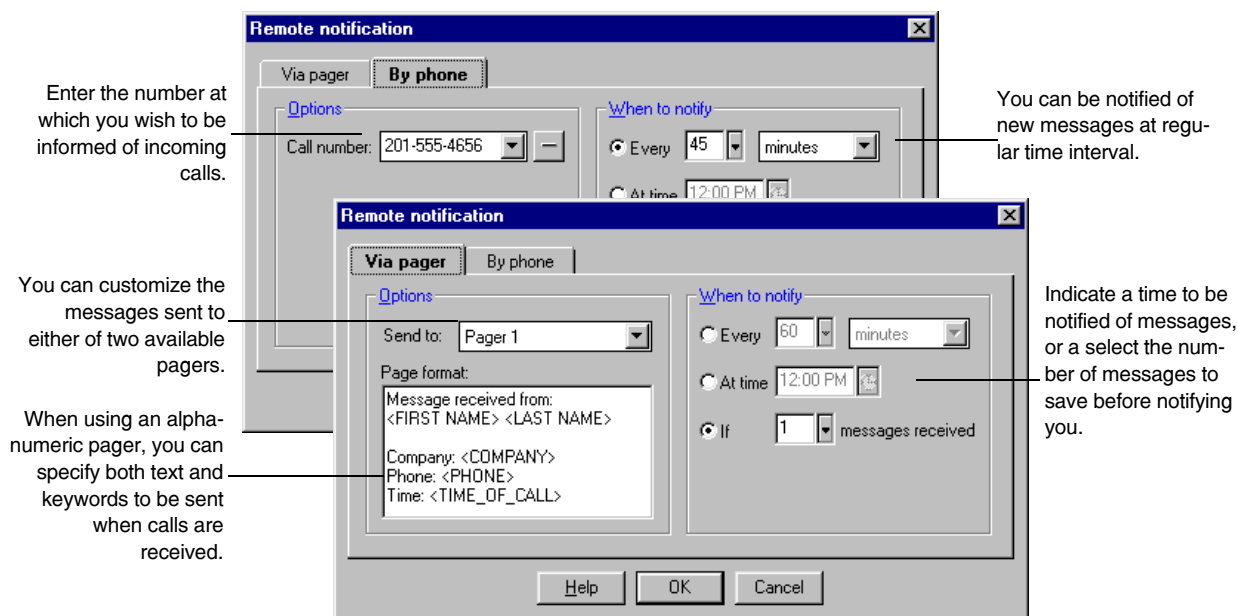
Using Remote Notification

Rather than calling in for your messages, Answer Bar can automatically notify you whenever you have new messages. You can choose to have Answer Bar call you with new messages, or notify you by pager. You can also choose to be notified at regular time intervals, at a specific time every day, or after a certain number of new messages have been taken.

Once you've set the Remote Notification options Answer Bar will dial your number (or your pager) and deliver your messages.

To set up remote notification options:

- ◆ From Dialer, select **File/Remote Notification Setup**:



When calls are received, you can elect to be notified by phone or pager.

To setup phone notification:

- ◆ Click the **By phone** tab at the top of the *Remote notification* window.
- ◆ Enter the number you want Answer Bar to call. As you enter new numbers, they will appear in the drop-down list so you can switch between them easily.

Choose from the following *When to Notify* options:

Every...	This option will notify you every few minutes or hours. Set the time period, and whether it is in minutes or hours, using the drop-down lists.
At time	This option will notify you once a day, at a specific time.
If... messages received	This option will notify you only after a certain number of new messages are received.

To setup pager notification:

- ◆ Click the **Via pager tab** at the top of the *Remote Notification* window.
- ◆ Click **OK**.
- ◆ Select which of your pagers you want to use. (For more information on setting up your pagers, see *Pager Setup* in Dialer's documentation).
- ◆ If you are sending to an alphanumeric pager, you can edit the information that is sent in the *Page Format* template.
- ◆ Choose from the following *When to Notify* options:

Option	Description
Every...	This option will notify you every few minutes or hours. Set the time period, and whether it is in minutes or hours, using the drop-down lists.
At time	This option will notify you once a day, at a specific time.
If. messages received	This option will notify you only after a certain number of new messages are received.

- ◆ Click **OK**.

Once these options are set, you can return to each Answer Mode's setup (see "Modes" on page 349), and choose how you wish to be notified of new messages. For example, you may want to be notified when you are *Unavailable*, but not when you are *On Vacation*.

To turn remote notification on or off in each Answer Mode:

- ◆ Right-click any Answer Mode tab in the Answer Bar **or...**
- ◆ Choose **File/Answering Setup** from Dialer's menu bar.
- ◆ In the list of options on the right, check *notify via Pager*, *Notify via Phone*, or both. You will need to set this option for each type of caller: All Callers, Priority Callers, and Code Access.
- ◆ Click **OK**.

DeskTop Set-by-Phone

DeskTop Set-by-Phone lets you access DeskTop Set remotely, from any touch-tone phone. It is an easy-to-use, menu-driven system that works much like the popular phone banking systems, and gives you access to multiple calendars and address books so you can access your data in a single call.

Using DeskTop Set-by-Phone, you can look up addresses and phone numbers, find free time in your schedule, or schedule an event with someone while you're on the phone. You can also review any messages taken by the Answer Bar, edit or change your outgoing message, or leave any one of your callers a private message that they can listen to when they call in.

You can access DeskTop Set-by-Phone using any touch-tone telephone. You simply dial your computer as if you were going to leave a message; when you hear the outgoing prompt, press the pound key. You will hear, *"Please enter your password followed by the pound key."* Once your password is entered (by default: 9999), you will enter the DeskTop Set-by-Phone main menu. From the menu, you can choose from the following commands:

- | | |
|-------------------------------|---|
| Listen to your Messages | You can check your new messages and review your call log. Then, listen to Address Book information related to the caller, and return their call. |
| Review your Calendar | You can check the remainder of today's schedule, any other day's itinerary, or search for free time to schedule a new event. |
| Search your Address Book | You can find any person on any page, or in any group, topic, or category in your address book. Then, listen to their phone numbers or addresses. Once you find a person, you can call them, page them, or send them a fax through DeskTop Set-by-Phone. |
| Change your Status | DeskTop Set-by-Phone allows you to set up several statuses (or <i>modes</i>), such as <i>Take messages</i> , <i>Unavailable</i> , <i>Day mode</i> , <i>Night mode</i> , <i>On vacation</i> , etc. You can call in can change you status from anywhere. |
| Change your Outgoing Greeting | You can select a different greeting, or record a new one when away from your home or office. |
| Leave a Private Message | You can leave private messages for callers, and give them each their own priority code. This can be used to let your family know where you are, or leave the answer to an important question for a client. |

What is TAPI, and why is it important?

TAPI stands for Telephone Application Programming Interface. This is a Microsoft standard for controlling your telephone from the Windows desktop, and is supported by many of the newer modems. The most popular advantage to TAPI-compliant (or “voice”) modems is their ability to use your PC’s microphone and speakers as a hands-free speakerphone, so that you do not need to lift the handset.

DeskTop Set-by-Phone requires a Unimodem/V-compliant voice modem, since this is the technology that allows you to hear the computer’s synthesized voice over the modem. Your modem manufacturer will be able to tell you whether or not your modem will work with Unimodem/V drivers. We have provided these drivers on the DeskTop Set installation CD-ROM.

For a further discussion of TAPI, how it works, and how to tell whether your modem is Unimodem/V-compliant, please refer to the Dialer’s documentation.

DeskTop Set-by-Phone’s underlying technology

We use these Unimodem/V features to make DeskTop Set-by-Phone possible, in the way only bank-by-phone or voice mail systems were used in the past. The remarkable thing about it is that voice modems cost only a fraction of the systems used in large institutions. Obviously, the difference is that voice modems can handle one line at a time, while corporate systems can service any number of lines.

If your office is large, and you would like several people to call into DeskTop Set-by-Phone at the same time, you will need to setup several PC’s or wait until we release the DeskTop Set-by-Phone server edition that will use industrial-grade voice boards. This server-based system will control multiple lines using a single PC.

Required Equipment

In order to use DeskTop Set-by-Phone, you will need the following:

- ◆ A PC running Windows 95 or NT. Since DeskTop Set-by-Phone relies on 32-bit voice synthesis, Windows 3.1x will not support this feature.
- ◆ A PC that is left on 24-hours, or that can be turned on remotely. It must be connected to a telephone line that you can dial directly, much like your answering machine.
- ◆ A Windows plug-and-play (PnP) voice modem that is Unimodem/V compatible. Although most modems that have speakerphone capability should work with DeskTop Set-by-Phone, we’ve found the following modems to work most reliably:
 - ◆ Creative Labs PhoneBlaster (28.8/33.6 internal)
 - ◆ Zoom COMSTAR SVD (Model 2800)
- ◆ If you have an office PBX, you will need an analog extension that allows you to connect a standard telephone to the phone system.

- ◆ Three-way calling service from your phone company. This is necessary for making outgoing calls, or sending faxes or pages, during a voice session. Three-way calling allows a user to connect a third party to an existing call in the following manner:
 - ◆ While on an existing call, you hook-flash to get a dial tone.
 - ◆ Dial the desired number and wait for an answer.
 - ◆ When the party answers, hook-flash again.
 - ◆ Now you have a three-way conference call. To disconnect the third-party, hook-flash again.

DeskTop Set dialer does exactly the same thing automatically using the hook-flash command.

A word on the scope of DeskTop Set-by- Phone

DeskTop Set-by-Phone is meant for general use. Although there is no reason why the system would not work for mission-critical tasks, we advise against using it in these situations. In the same way that even the best residential answering machine is not suited for corporate use, DeskTop Set-by-Phone is not suited for purposes other than those described in this document. Until a multi-line, server-based version is available, we recommend this system for individual use only.

Please also understand that Okna Corporation cannot provide adequate remote technical support related to your computer equipment, modem, or telephone lines. If you have a problem using your modem with Windows 95's dialer, we can safely conclude that the problem is related to one of these components, and would not be able to assist you. Finally, some features are a function of your telephone system itself: for example, you must be able to conference a call by hand in order to do so with DeskTop Set-by-Phone.

Setting up DeskTop Set-by-Phone

DeskTop-Set-by-Phone's setup is organized on three tabs that address the following basic setup options: your touch-tone menu commands, settings for your password and how DTS-by-Phone operates, and a list of the Address Books and Calendars that are available via phone.

Each of these tabs' options are explained below.

Menu tab

When you call into DeskTop Set-by-Phone, you will be presented with a menu. This menu is customizable, and can be altered on this *Menu* tab. You can place the features you use most at the beginning of the menu, or arrange the commands in a way that may make them easier to remember.



The Menu tab lets you configure the main menu, so you can place your most often-used options at the beginning of the list.

Option	Description
Synthesized:	Enter a message to be read by text-to-speech,
Recorded:	You can select a pre-recorded greeting from the list, or record a new message of your own to remind you of the available options and key assignments.
Key assignments	You determine what keys bring up which features. Simply select a different option from the list.

Settings tab

These options control how DeskTop Set-by-Phone is accessed, how it prompts callers, and what features are available to callers. For security, you can password DeskTop Set-by-Phone - you will then need to enter this password (by default: 9999) to access any of DeskTop Set-by-Phone's options

Enter your password number of attempts using the combo-boxes.

You can use text-to-speech or pre-recorded WAV files to request your password.

You can set DeskTop Set-by-Phone to disconnect no commands are entered after a certain interval.

If you allow others to access your system, you may wish to disable some of the outgoing dialing options.

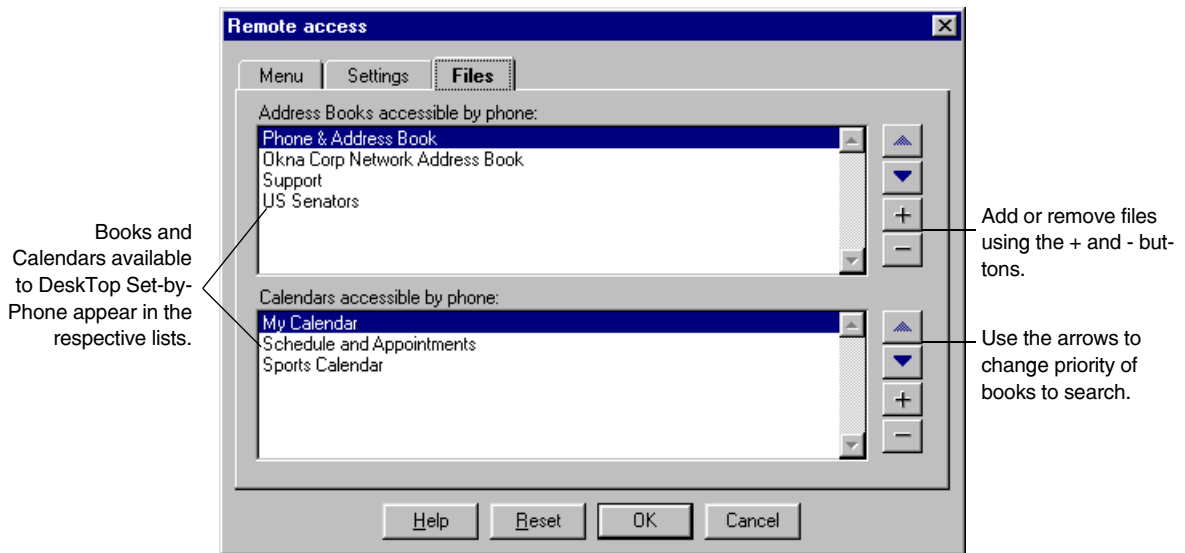
You can set access security and outgoing call options here.

Option	Description
Access code	Enter you access code and number of attempts here. If the wrong password is entered several times, DeskTop Set-by-Phone automatically disconnects.
Disconnect if idle	If you fail to enter any commands after a specified time period, DeskTop Set-by-Phone will automatically disconnect. This prevents you from leaving the line open, and possibly incurring additional long-distance charges.
Prompt	You can select the message played that requests your password. You can use text-to-speech, a pre-recorded greeting, or create your own.
Disable three-way calls	When selected, you are unable to place or return call through DeskTop Set-by-Phone.
Disable faxing	Used to prevent unauthorized faxes from being sent.
Disable paging	Prevents the sending of pages to persons in your address books.
Disable prompt/message editing	Select this to prevent the adding, editing, or deleting of outgoing prompts and messages.

- | | |
|-------------------------|---|
| Do not mark messages... | When selected, your messages will still be marked as unread (or “new”) when you return to your PC, or call in to DeskTop Set again later. |
| Skip list menus | When DeskTop Set-by-Phone comes across a list, it will play instructions and wait for a response. Once you become familiar with the options, you can disable the prompt and play lists automatically. |

Files Tab

This setup tab lets you specify which address books and calendars are available via phone. This is useful if you have certain books that you do not wish to use..



You select which of the your books are searched for caller information.

To make an address book or calendar accessible by phone:

- ◆ Click the **Add (+)** button.
- ◆ Select the book or calendar you wish to add.
- ◆ Click the **Select** button.

To remove an address book or calendar from the list of available files:

- ◆ Click the address book or calendar you wish to remove from the list.
- ◆ Click the **Delete (-)** button.

To change the order in which the books or calendars are presented:

- ◆ Click the book or calendar you wish to reorder.

- ◆ Use the arrow buttons to move the file in the list.

Using DeskTop Set-by-Phone

DeskTop Set-by-Phone is unique in that its instructions are presented to you, in real time, as you use it: the program will literally prompt you through its operation. Because of this, you will find DeskTop Set-by-Phone to be easy to use, even for the very first time.

This section explains how to dial into DeskTop Set-by-Phone, and enter your password (providing one has been set - see "Settings tab" on page 373). It also describes how to use the private messaging feature.

Calling in to DeskTop Set-by-Phone

In order to use DeskTop Set-by-Phone:

- ◆ Your PC must be turned on, and connected to a phone line (much like an answering machine).
- ◆ Dialer must be running, and Answer Bar must be set to a mode which will answer the phone (you can make sure this true by clicking Dialer's **Auto** button so that it is lit).
- ◆ You must dial in from a touch-tone phone, or have a touch-tone generator (such as those available at Radio Shack or other electronics stores).

To dial in:

- ◆ Call the telephone number that your modem is connected to.
- ◆ Answer Bar will answer the call, and begin playing your greeting.
- ◆ As the greeting is playing, press the **Pound (#)** key on your telephone and hold it down for about a half-second.
- ◆ Enter your password (if one has been set: see "Settings tab" on page 373), followed by the **#** key.
- ◆ You will then be greeted with DeskTop Set-by-Phone's *Main menu*.

To navigate the menus:

- ◆ As a general, rule the following commands can be used throughout DeskTop Set-by-Phone to navigate the menus:
- ◆ When in doubt, follow the prompts for instructions. You do not need to wait for a prompt to finish playing. As you become familiar with the commands, you can enter them at any time during a message.

Command	Description
*	Go back; repeat the previous menu.
#	Acts as an Enter key; press # to enter each command.
**	When * is pressed two times, in succession, the system will disconnect, and you can hang up. For most modems, it is best to exit the program in this way, so as not to leave the modem "on hook".
7	In general, pressing 7 will playback the list of items you have searched for.
8	In general, pressing 8 will take you back to the previous item in any list.
9	In general, pressing 9 will move you forward to the next item in any list.

Using private messaging

DeskTop Set-by-Phone allows callers to leave private messages for each other. Message boxes are assigned three digit codes (from 100-999) - when you leave a private message, you assign it to one of these boxes.

You can assign a permanent number for someone - **473** for the family, for example, so that they can check for private messages by always checking this same box. You can also assign the message to any number, and then page or e-mail the person with a note for them to check that box.

To leave a private message:

- ◆ Call in to DeskTop Set-by-Phone (see "Calling in to DeskTop Set-by-Phone" on page 375).
- ◆ Select option 6 from the main menu ("6" is the default option for leaving private messages - to change this option, see "Menu tab" on page 372).
- ◆ Follow the prompts to leave a message, and assign it to a box number.
- ◆ You can then contact your party, if necessary, with the box number that contains their message.

To retrieve a private message:

- ◆ Call in to DeskTop Set-by-Phone (see “Calling in to DeskTop Set-by-Phone” on page 375).
- ◆ When Answer Bar answers and begins greeting you, press the **Pound (#)** key. You will be prompted for a password.
- ◆ Enter your message box number followed by the **Pound (#)** key.

DeskTop Set-by-Phone Menu Overview

You can use DeskTop Set-by-Phone from any touch-tone telephone. You simply dial your computer as if you were going to leave a message; when you hear the Answer Bar’s outgoing prompt, press the pound key. You will hear, *“Please enter your password followed by the pound key.”*

Once your password is entered, you will be greeted with DeskTop Set-by-Phone’s main menu.

The following describes each menu option, beginning with the main menu. This listing will give you a very detailed understanding of what DeskTop Set-by-Phone is capable of, and provide a good reference as you begin testing DeskTop Set-by-Phone and customizing its options.

Main menu

“Welcome to DeskTop Set-by-Phone!

To listen to your messages, press 1. To review your Calendar press 2. To search an Address Book, press 3. To change your status, press 4. To change your outgoing greeting, press 5. To leave a private message, press 6. To review your system’s current settings, press 7. To disconnect, press pound and hang up.”

You can then make your choice and proceed to the following menus:

Check messages

“You have new messages. To review new messages press 1. For a list of pending calls - press 2. To review incoming calls - press 3. For outgoing calls - press 4. To return to the previous menu, press the Star key.

Review New Messages

To hear first message press 7. To return to the previous message - 8. To play the next message press 9. To hear instructions at any time, press 4. To return to the previous menu, press the star key.

Calendar information

Press 1 to review today's remaining events, 2 for a certain date, 3 to find free time, or press pound for more options. To return to the previous menu, press the star key.

Review Today's Remaining Events

Press 7 to list the events. When you hear an event, press the pound key for Address Book information. For the previous event press 8, for the next - 9. To return to the previous menu, press the star key.

Review a Certain Date

Make your selection at any time during this message. Press pound for today. Zero - pound for tomorrow. For any date this month, enter the day followed by the pound sign. Or enter a date in a day-day-month-month-year-year format and press pound.

If a day or a month is less than 10, please precede actual date with zero. For example, May first of nineteen ninety seven should be entered as zero-five, zero-one, ninety seven. Please enter a desired date now. To return to the previous menu, press the star key.

Find Free Time

Enter meeting duration and press pound. It must be entered in a four digit, hour-minute format. For example, 30 minutes would be entered as zero, zero, three, zero, while an hour and a half would be entered as zero, one, three, zero. To return to the previous menu, press the star key.

Enter Duration

Press 7 to list available blocks of time. When you hear a desired interval, press the pound key to select it. For the previous interval press 8, for the next - 9. To return to the previous menu, press the star key.

Additional Options

Press 1 to select another calendar, 2 to review pending calls, or 3 for pending reminders. To return to the previous menu, press the star key.

Select Another Calendar

To review a list of available calendars press 7. When you hear the calendar you wish to search, press the pound key to select it, for the previous calendar press 8, for the next - press 9. To return to the previous menu, press the star key.

Review Pending Calls

Press 7 to play the list of reminders. When you hear a reminder, press the pound key for Address Book information, 8 for the previous reminder, for the next press 9. To return to the previous menu, press the star key.

Review Pending Reminders

Press 1 to review today's remaining events, 2 for a certain date, or 3 to find free time. To return to the previous menu, press the star key.

Address Book Search

To search all records press 1. To select page letter press 2. To select a topic press 3, to select a group press 4. To select a category press 5. To select another address book - press 6. To return to the previous menu, press the star key.

Search All Records

To search by Last name press 1, by Company press 2, by Account press 3, by Phone number press 4, by First Name press 5, by Page Name press 6. To return to the previous menu, press the star key.

Enter search string

Enter a search string followed by the pound sign. For letter Q - press 7, for letter Z - press 9. To return to the previous menu, press the star key.

Review the List

To review the list of matching records press 7. When you hear the record you wish to search, press the pound key to select it, for the previous record press 8, for the next - press 9. To return to the previous menu, press the star key.

Select a Record

For list of telephones - press 1. For business address - press 2. For home address - press 3. For fax number press 4, For pager number press 5. For e-mail and web press 6. For the entire record press 7. To leave a private message - press 8. To return to the previous menu, press the star key.

Review List of Telephones

When you hear the desired number, press pound to dial it, for the previous phone number press 8, for the next - press 9. To return to the previous menu, press the star key.

Retrieve Fax Number

To review available templates press 7. When you hear the template you wish to use, press the pound key to select it, for the previous template press 8, for the next - press 9. To return to the previous menu, press the star key.

Select a Template

To prepare a fax to be sent, press the pound key. To return to the previous menu, press the star key.

Send a Fax

A fax has been scheduled for transmission after you complete this session.

Select a Page Number

Press the key for the desired page letter. For the letter Q, press 7, for Z press 9, then when you hear the name of the page you wish to search, press pound. To return to the previous menu, press the star key.

Select a Topic

To review the list of available topics press 7. When you hear the topic you wish to search, press the pound key to select it, for the previous topic press 8, for the next - press 9. To return to the previous menu, press the star key.

Select a Group

To review the list of available groups press 7. When you hear the group you wish to search, press the pound key to select it, for the previous group press 8, for the next - press 9. To return to the previous menu, press the star key.

Select a Category

To review the list of available categories press 7. When you hear the category you wish to search, press the pound key to select it, for the previous category press 8, for the next - press 9. To return to the previous menu, press the star key.

Select Another Address Book

To review available books press 7. When you hear the book you wish to search, press the pound key to select it, for the previous book press 8, for the next - press 9. To return to the previous menu, press the star key.

Change Status

To review available statuses press 7. When you hear the status you wish to use, press the pound key to select it, for the previous status press 8, for the next - press 9. To return to the previous menu, press the star key.

Change Outgoing Greeting

To select another greeting, press 1. To re-record the current greeting, press 2. To record a new one, press 3. To listen to the current greeting, press 4. To return to the main menu, press the star key.

Select Another Greeting

To review greetings, press 7. When you hear a greeting, press pound to select it, for the previous greeting press 8, for the next - press 9. To return to the previous menu, press the star key.

Select a Greeting

The greeting has been changed. To return to the previous menu, press the star key.

Re-Record the Greeting

Please record your greeting after the tone. When finished press the pound key. To return to the previous menu, press the star key.

Record a New Greeting

Please record your greeting after the tone. When finished press the pound key. To return to the previous menu, press the star key.

Record a private message

Enter the 3-digit message number and press pound. To return to the previous menu, press the star key. Please record your message after the tone, when finished press the pound key. To return to the previous menu, press the star key.

Check current system settings

This feature announces your system's current settings (using text-to-speech) including: # of rings before answer, toll-saver options, actions to take upon answer, call transferring, call forwarding, greetings played, etc. *To return to the previous menu, press the star key.*

Windows sound and modem settings

DeskTop Set's Dialer and Answer Bar are very dependent on Windows' modem, dialing, and sound settings, especially when it comes to speakerphone options and the recording and playback of sounds. You can select **File/Windows settings...** to open the most important Windows setup options, from one menu, so you don't have to jump around your entire system to access them. Here is a brief description of each of the sub-menu setup options. For more detailed information on any of the topics, please refer to the Windows Help files.

Volume Control

You can adjust the volume and balance settings for all devices that are used for playback of sounds. Select **Options/Properties...** to change to the recording settings or select which volume controls are shown.

Audio Properties

You may select a Preferred device for recording and playing sounds. Volume settings can be set here, as well as recording quality.

Modem Properties

Select the general settings your modem uses for communications, including COM port, modem volume, transmit speeds, and time-outs.

Modem Diagnostics

You can add or remove modems from this window. You can also perform port diagnostics to make sure that you modem is communicating properly with your COM port.

Dialing Properties

When you choose to override the DeskTop Set Dialing properties, you can set the Windows options for your area code, PBX prefixes, etc. here (see "Dial numbers based on Windows 95 settings" on page 311).

Menu Commands

Although virtually all options in Dialer can be access using your mouse, there may be some instances when you prefer to use your keyboard to make selections. Here are explanations of the dialer menu options.

File

The file menu is used primarily for setting up Dialer, Answer Bar, and DeskTop Set-by-Phone.

Options	Description
Record greetings...	Opens the sound recorder, letting you edit or record greetings and messages.
Dialing setup...	Allows you to setup the options that dialer uses for out-going calls.
Answering setup...	Allows you to setup the options that Answer Bar uses to handle incoming calls.
Speed-dial setup...	You can review and edit the settings for your Memory pads.
Databases setup...	Lets you setup your Databases, such as call lists or Address Book groups, to be assigned to Memory Pad Tabs.
Remote notification...	Brings up the options that can notify you of messages by phone or pager.
Pagers setup...	If you wish to be paged when you have new messages or alarms go off, you must set up these options.
DeskTop Set-by-phone...	Opens the DeskTop Set-by-phone setup. DeskTop Set-by-Phone allows you to call into your system and access your Address Book and Calendar information.
Emulate remote access	Lets you run DeskTop Set-by-Phone as if you called in from an outside line. Instead of using a telephone, you use your keyboard, microphone, and speakers to test the settings.
Windows settings...	You can access the Windows setup dialog boxes for the sound and modem controls that effect Dialer (see "Using Voice Recorder" on page 336).
Exit	Closes the Dialer

Edit

The Edit menu lets you change and manipulate both Dialer and Address Book record information.

Options	Description
[Person]...	Opens the record folder for the person shown in the dialer display. The actual person's name or company will be listed here.
Edit button...	Lets you edit a memory button.
Cut, Copy, Paste	Use the standard Window's Cut, Copy, and Paste commands as you would in any other application.
Clear	Clears the Dialer's Display
Edit tab...	Opens the Settings for the selected Memory pad tab.
Find...	Searches your address book for the number shown in the Dialer's display. This is generally used when you manually enter a number into dialer, then wish to find the corresponding record in Address Book.

View

The view menu lets you choose which Dialer components are shown. Most options are described in the earlier (see "Dialer Features" on page 301), the rest are described below:

Options	Description
Answer bar	Opens Answer bar
Wide display	Displays both the left and right memory pads. To view only the left pad (generally the number keys), uncheck this option.
Hide all	Check here to show dialer with only the bare essential components.

Search

There are several different search formats that you can use (right from Dialer) to search your Address Books, making sure that you can always find the name, company, address, or phone number that you need. Here are the options:

Options	Description
Exact	Finds all records with a certain name, zip code, phone number, and more. It looks for the <i>exact</i> text you give it. For example, if you look for the last name <i>Jones</i> , it finds <i>Jill Jones</i> , but not <i>Steven Johns</i> .
Query	This is the most comprehensive and flexible of the search tools. It allows you to search for combinations of text and fields. The next section describes this in great detail.
Phonetic	This is similar to Exact search, but you do not have to remember exactly how to spell a name. It finds all entries (individual or company) that sound similar to the word you type. For example, if you search for the company name <i>Okno</i> , it finds <i>Okna Corporation</i> .
Category	Finds all names that belong to a certain category. This is especially useful when you want to assign the members of one category to another category or a group.
Telephone	Similar to exact search, except it finds only telephone numbers. If you tell it to look for just an area code (212) or an area code and exchange (212-555-), it lists all phone numbers that begin with those digits.
[Last dialed]	The last 10 number you've called will be listed here for quick access. Just select a number to dial it.

Dial menu

When the person in the Dialer's display is in one of your address books, you will have access to all of their information, and be able to dial any one of their phone numbers.

Options	Description
[Person]	Opens the record folder for the person shown in the dialer display. The actual person's name or company will be listed here.
[Phones]	Lists all available phone numbers for the person in the Dialer's display. Select one from the list to dial it.
Options	Opens the <i>Dialing options</i> window for the person in the Dialer's display. You can then change dialing formats or call priority. Additional information can be found in the
Web	If you have a URL (web site address) listed for a person or company, this will launch your default web browser (MS Internet Explorer or Netscape Navigator) and go directly to the web site.

Schedule menu

When you've got a person or company listed in the Dialer's display, you can create and view linked calls, reminders, or Calendar events.

Options	Description
Phone call...	Schedules a pending phone call.
Reminder...	Schedules a reminder.
Event...	Schedules an event.
Show calls	Opens the record folder for the name in the Dialer display to its Log tab. You can see a list of all calls made to or from the individual.
Pending reminders	Opens the record folder for the name in the Dialer display to its Reminders tab. You can see a list of pending reminders for the individual.
Calendar	Starts the DeskTop Set Calendar, and opens to the current day. You can review your itinerary and schedule new events.
Templates...	Lets you add, remove or edit reminder templates.

Log menu

When you've got a person or company listed in the Dialer's display, you can log calls, messages, notes, and attach files to that record's folder.

Options	Description
Out-call / In-call	Logs an outgoing call with the date and time automatically entered. The call timer can be started automatically to record the duration of the call.
Message	Takes a message for the selected record; the message can then be routed (sent) to other DeskTop Set users on your network.
Note	Opens windows notepad and attaches a note to the record folder.
Attach file	Lets you select any file on your system as an attachment for quick access in the future.

Help

You can use the Help menu just as you would most Windows help systems.

Options	Description
Search...	Lets you search the DeskTop Set help files for the information you need.
Contents...	Opens the help files to its contents for references to various topics
Copyright...	Shows copyright information including DeskTop Set version, registered owner's name and company, and your serial number.

7

Voice Recorder

Introduction

You'll find the Voice Recorder commands throughout DeskTop Set. You can, for example, record a sound that will be played each time a person's Folder is opened, or, in Dialer, record custom messages to be played back when you reach someone's voicemail. If you use Dialer's Answer Bar, you'll use this feature to record custom greetings, prompts, and hold messages, as well as announcements for when calls are received or forwarded.

DeskTop Set's Voice Recorder works very similarly to other recording utilities, and you'll likely find it easy to use the very first time you need it. The following section explains each of Voice Recorder's options and menus, as well as how to control the way in which your voice is recorded.



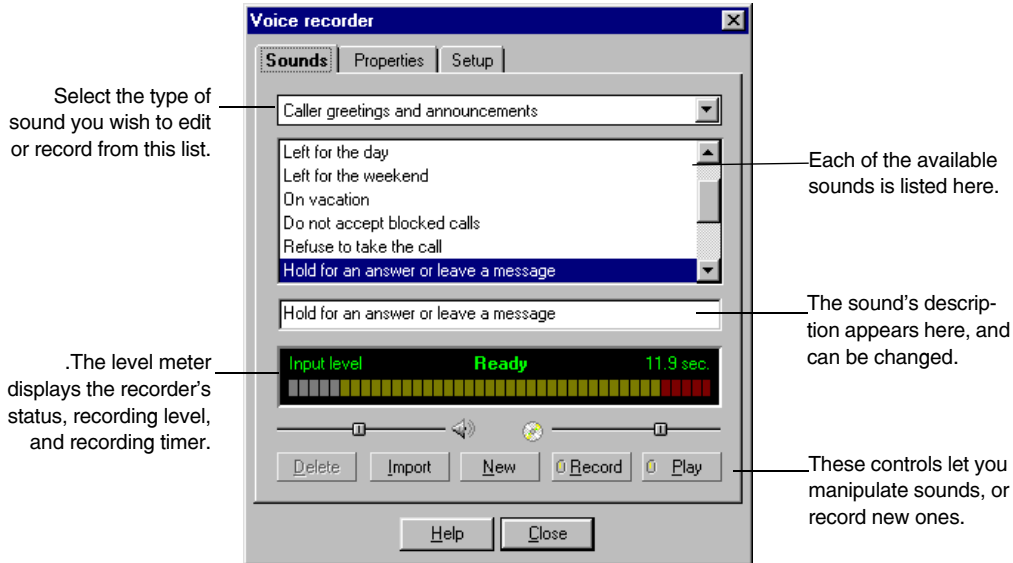
You can start the Voice Recorder from any DeskTop Set module wherever you see the microphone icon (shown at left).

Note: You must have a sound card or voice modem properly installed. You should verify that you can properly record sounds on your system using the Windows *Sound Recorder*.

Voice Recorder Options

To view the Voice Recorder from Dialer:

- ◆ Choose File/Record Greetings from the Dialer's menu bar.
- ◆ The Voice Recorder will appear.



The Voice Recorder's Record utility, Properties, and Setup screen can be reviewed from this single window

Sounds

The **Sounds** tab allows you to choose the type of sound you wish to review or edit, and lists all the sounds in that particular category. You can play any sound in the list, or record a new sound using the controls at the bottom of the window.

To list a particular type of sound:

- ◆ Click the drop-down list at the top of the window.
- ◆ Select the type of sound you wish to review or record from the list.

To play a particular sound:

- ◆ Click the sound's description in the list.
- ◆ Adjust the speaker volume using the Sliding Control.
- ◆ Click the **Play** button.

To record a new sound:

- ◆ Select the type of sound you wish to record from the drop-down list at the top of the window.
- ◆ Select the recording quality using the sliding control at the bottom of the window. Remember: higher quality sounds require more disk space than lower quality sounds.
- ◆ Click the **New** button, and enter a description for this new sound in the window that appears.
- ◆ Click the **Record** button.
- ◆ Depending on your other Voice Recorder settings, you may have a slight pause before recording begins, and a voice may prompt you to get ready to record (see “Setup” on page 340).
- ◆ After the tone, begin speaking into your microphone.
- ◆ Recording will stop when you reach the maximum recording time (which can be set in the **Setup** tab) or when you click the **Stop** button.
- ◆ You can then click **Play** to hear the newly recorded sound.

Note:

The prerecorded messages and greetings that are included with DeskTop Set were prepared in a professional recording studio. The sounds that you record yourself may not sound as clear or loud as those included with DeskTop Set.

To increase the quality of your own recordings, we recommend using a specialized program, such as *Creative WaveStudio* (included with most Sound Blaster audio cards), to edit the WAV files you record in DeskTop Set. These utilities generally have options for increasing or amplifying the volume (Select **Special/Amplify Volume...** in *WaveStudio*). You can then use the Sound Recorder’s import feature to add them to DeskTop Set.

To use a sound that is already saved on your system:

- ◆ Select the type of sound you wish to record from the drop-down list at the top of the window.
- ◆ Click the **New** button, and enter a description for this new sound in the window that appears.
- ◆ Click the **Import** button. The *Sound files browser* window will appear:

File names appear here, along with the DeskTop set description (if applicable).

Checking this option will cause each sound to be played as it is clicked in the list above.

You can select sound files from network drives, as well.

This list of directories lets you navigate your system to find a sound.

You can assign any sound on your system to be used as a DeskTop Set sound. Click the **Import** button, and use this browser to select the sound file.



- ◆ To sample any sound file on the drive, click its name, and click the speaker to sample the sound.
- ◆ Use the Directories listing on the right to navigate your system and find the sound file you wish to use.
- ◆ Once you've found the file you wish to use, highlight it and click the **OK** button.
- ◆ Confirm that you wish to assign this sound to DeskTop Set.

Properties

The **Properties** tab displays detailed information about a particular sound.

Details about the sound file's location, length, and format appear here.

You can use these buttons to sample the sound, assign a new file to the sound, or reset a pre-recorded sound to its default.

Recording controls are repeated here. You can use them to re-record this particular sound.

The **Properties** tab contains a sound's details, and lets you re-record the sound, if necessary.

To view a sound's properties:

- ◆ Select the sound on the *Sounds* tab.
- ◆ Click the *Properties* tab.

To play the sound:



- ◆ Click the speaker next to the sound's Type.

To change the file name the sound is stored in:



- ◆ Click the folder next to the sound's File Name.
- ◆ Select a new sound file to play for this sound.

To reset a particular sound to its default voice:



- ◆ Click the Reset button next to "Reset to Voice".
- ◆ Click **Close** to return to the Dialer.

To change the sound's description:

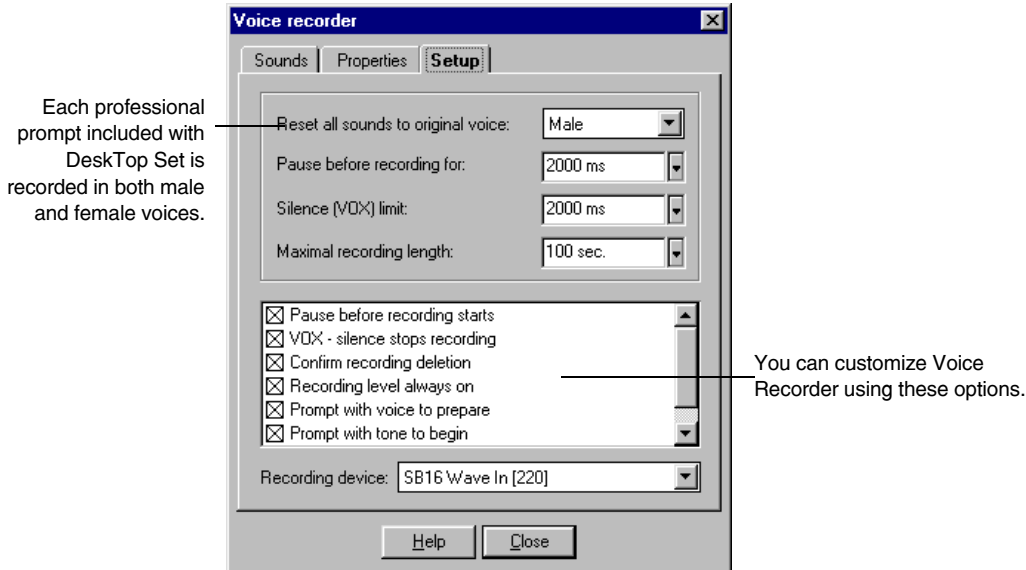
- ◆ Highlight the description.
- ◆ Make your changes.
- ◆ Click the **Close** button, or another tab, to save your changes.

To re-record the sound:

- ◆ Select the recording quality using the sliding control at the bottom of the window. Remember: higher quality sounds require more disk space than lower quality sounds.
- ◆ Click the **Record** button.
- ◆ Depending on your other Voice Recorder settings, you may have a slight pause before recording begins, and a voice may prompt you to get ready to record.
- ◆ After the tone, begin speaking into the microphone.
- ◆ Recording will stop when you reach the maximum recording time (which can be set in the *Setup* tab) or when you click the **Stop** button.
- ◆ You can then click **Play** to hear the newly recorded sound.

Setup

You can choose Voice Recorder's setup options. These settings affect all sounds that are recorded with the Voice Recorder.



The Setup tab allows you to choose how sounds are recorded, and how the professional prompts are played.

To edit the Voice Recorder's Setup options:

- ◆ Click the **Setup** tab.
- ◆ Change any of the options.
- ◆ Click the **Close** button, or another tab, to save the changes.

The following options are available on the **Setup** tab:

Option	Description
Reset to voice	Voice Recorder includes professionally recorded voice prompts which you can use. These prompts are recorded in both a male and female voice. This option selects which voice the sound is played in. This option is only available if you've chosen to install the professional prompts.
Pause before recording	Voice Recorder can be set to pause between the time you click the Record button and the time recording begins. If this option is selected below, you can set the length of this delay, in milliseconds, here.

Silence (VOX) delay	You can choose to have Voice Recorder automatically stop recording when you stop speaking (see “VOX - silence stops recording” below). Use this option to control how long you must be silent for before the recording stops.
Max. recording length	This option sets a maximum recording length, in seconds. When this time limit is reached, recording will stop. Since recordings do require disk space, this is useful as a reminder to keep your messages short.
Pause before recording starts	When this option is checked, Voice Recorder will pause after you click Record before turning on the microphone. This allows you to prepare to record. The length of this pause can be set above.
VOX - silence stops recording	Checking this option causes the recorder to automatically stop recording when you stop speaking. The length of time you need to be silent before the recording stops can be set above.
Confirm recording deletion	When this option is checked, you will need to click the Delete button twice to delete a sound. This prevents you from deleting messages or greetings by mistake. How quickly you must click to delete the sound can be set above (see “Wait for erase confirmation” above).
Recording level always on	Checking this option causes your microphone to be “on” at all times, even when you are not recording. This causes the level meter on the Voice Recorder’s display to register. This is useful if you wish to test the volume of the recording (on the colored volume meter) before actually recording.
Prompt with voice to prepare	When this option is checked, a voice will prompt you to “Get ready to record” just before the recording begins.
Prompt with tone to begin	This option will play a tone just before the recording begins, prompting you to begin speaking.
Recording device	You can select to record using your the microphone from your sound card, voice modem, or other devices here. Generally the sound quality will be best from a sound card’s microphone.

