



PhoneTree®

Operating Instructions and First Use

PhoneTree®

S T A N D A R D

[turn to page 16B](#)

PhoneTree® **plus**

and PBaseWin20 software

[turn to page 2A](#)

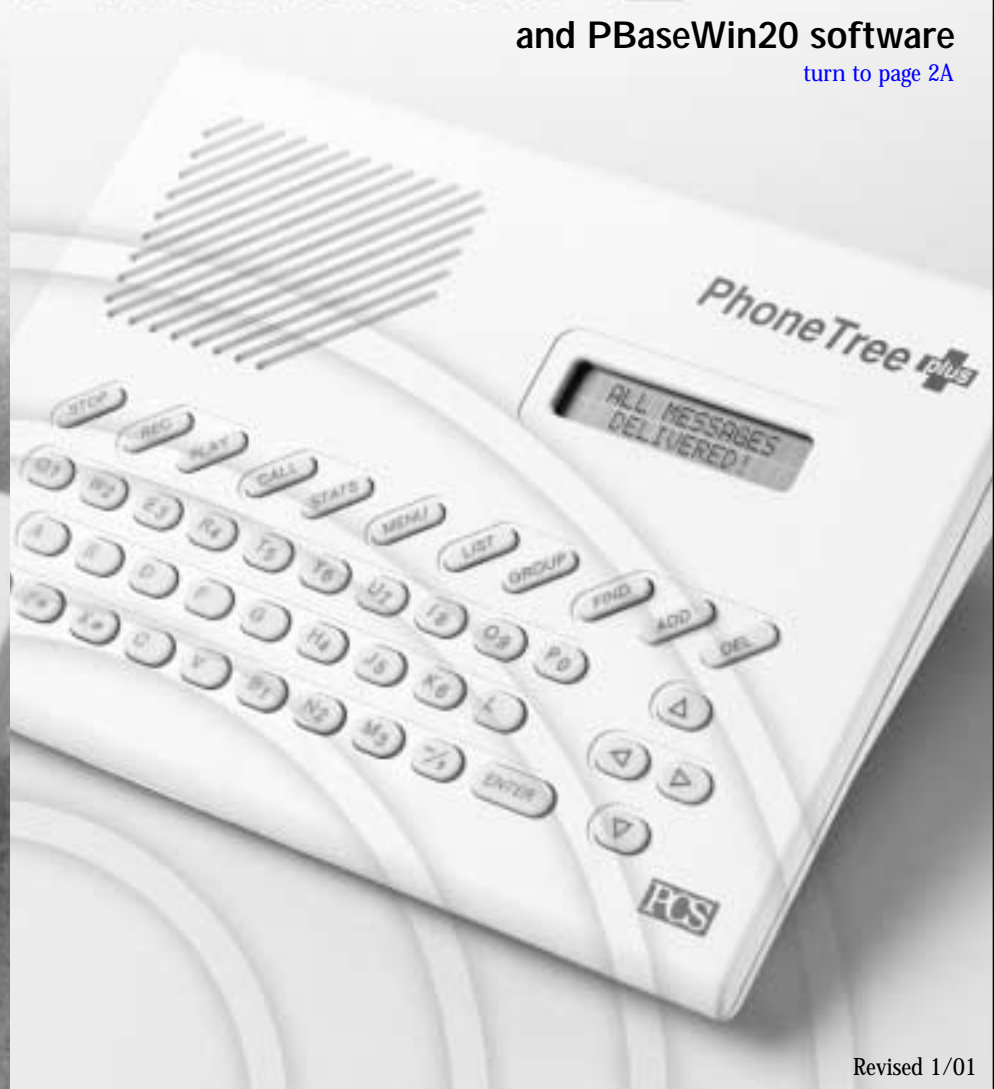


Table of Contents: PhoneTree Plus

Installation and First Use	.2A
Reference	.4A
Setups	.4A
Lists and Groups	.7A
What is a List?	.7A
Groups	.9A
Checking Call Status	.10A
Sending/Receiving Data	.11A
Using Data from Other Programs	.11A
Sending Lists to PhoneTree	.11B
Sending Setups to PhoneTree	.12A
Receiving Data from PhoneTree	.12A
Saving Recorded Messages	.12B
Hints for Message Recording	.23B
Remote Access	.24A
Sample Messages	.24B
Troubleshooting	.13A
Safety Information	.29B
Warranty & Upgrade Info	.30A
The PhoneTree Website	.15B
Contacting Us	.16A

Installation and First Use

- 1] With your computer off, connect PhoneTree Plus to your computer using the provided serial cable. Use the 9-25 pin adapter provided if necessary [1].
- 2] Plug the provided wall transformer into a wall outlet and insert the black connector into PhoneTree [2]. PhoneTree will perform several diagnostic checks and will then chime.
- 3] Connect one end of the provided phone cord into the back of the PhoneTree [in either phone jack, 3] and plug the other end into a nearby analog telephone jack.
- 4] Turn your computer on and insert the PBaseWin20 CD into your CD drive. Install the software by choosing Start -> Run -> D:\SETUP.EXE (where D is your CD drive).



Installation and First Use, continued

Follow the on-screen prompts and choose the default options whenever prompted.

- 5] Launch the PBaseWin20 software (choose Start -> Programs -> PBASEwin20). You will see the main screen of the PBaseWin20 software, with an empty calling list.



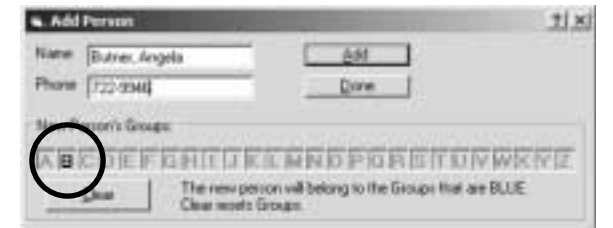
- 6] You can generate your calling LIST in one of two ways. You can import the data from another application, or type in the information manually. Your LIST is what PhoneTree will use when calling, and the people in the LIST can be divided into a maximum of 24 different working GROUPS.

To import your data from another application, follow the instructions on page 11A in the section "Sending/Receiving Data."



To type your data in manually:

- a) Choose "Add Person" from the Edit menu (shown at right).
- b) Type the first person's name (NOTE: if you type the last name first, then a comma and then the person's first name, the PBaseWin20 software can sort the data alphabetically later) and press the Tab key to enter their phone number, including area code if necessary (shown below). By clicking on B, Angela will be added as a member of Group B.
- c) When finished, press the Enter key on your keyboard, which is the same as clicking the Add button with your mouse. You can now enter the next person's name and phone number. Continue in this way until your entire LIST is entered, at which time you should click the Done button.



Installation and First Use, continued

d) If desired, change the names of the GROUPS at the bottom left of the screen by clicking on them and typing in new names (shown at right).

e) To put people from your LIST into one or more GROUPS, select a person by clicking on a name with the mouse, then checking that GROUP's checkbox at the bottom of the screen. You will see that GROUP's letter appear for that person under the GROUP column. You can also set up the GROUPS first and put your members into them as you enter them. For more about GROUPS and LISTS, read the "LISTS and Groups" section on page 7A.

f) Save your file by choosing "Save As" from the File menu. Name your file and click Save.

7] When your LIST is ready for calling, choose "Talk to PhoneTree" from the PhoneTree menu.

8] Click on the "Choose Setups" tab. Click on the "Add New Setup Set" button and give your setup set a name, like "MY SETUPS". Now the currently selected setup name will appear at the top of the window (as shown at right).



9] Click on the "Basic Options" tab (shown at right). Check the boxes next to the desired options (more information on these options and what they do starts on page 4A). Choose "Use Short Messages" for better message quality.



Installation and First Use, continued

10] Click on the "Dialing" tab. Make sure you have the box next to "Tone Dialing" selected (unless you need to use pulse dialing) and add any necessary prefixes or suffixes (more about these options appears on page 4B). See picture at right.



11] Click on the "Time" tab. Set the "Don't Call Before," the "Don't Call After" and the "Call On Days" options (shown at right). Don't forget to click the "A" button for AM, or the "P" button for PM.



12] Click the "Send Setups to PhoneTree" button (in the lower left corner). All the current setups will be sent down to the PhoneTree unit, along with the correct time and date (as long as the time and date on your computer are set correctly).

13] Now it's time to send your LIST to the PhoneTree unit. Click the "Send to PhoneTree" button (under LIST Transfers). You will then see a caution box asking if it's OK to replace the data in the PhoneTree with the new data. Click OK. (Once you've done this, your computer is available for other applications—you don't even need to have PBaseWin20 running while PhoneTree Plus is calling.)

14] To record your message, press the [REC] button on the PhoneTree unit. After the beep, immediately start speaking your message. You will see a countdown of remaining time on the PhoneTree display. Once you have completed your message, press the [STOP] button and your message will be played back to you. PhoneTree can only store one message at a time. If you don't like your message, press the [REC] button and record over the old message. Read the "Hints for Message Recording" (on page 23B of the Standard section of this manual) for more information on recording. Any time the power is interrupted or disconnected to the PhoneTree, the message will need to be re-recorded.

15] Time to start calling! First determine if you want PhoneTree to call your entire LIST, or just one or more GROUPs (see page 7A for more detailed information on Lists and Groups).

Installation and First Use, continued

To call your entire LIST:

a) Press [CALL] and then [LIST] on the PhoneTree unit. PhoneTree will call everyone on the LIST and deliver your message.

To call one or more GROUPS:

b) Press [CALL], then [GROUP]. You will see “Select GROUPS and press ENTER” in the display. Choose one or more GROUP(S) by pressing their number and then press [ENTER]. PhoneTree will only call the people in the GROUP(S) you selected. Now your new PhoneTree Plus should be busy making calls!

When the call session is completed, you will want to check the Call Status. Press the [STATS] key, and then press <V> for <V>IEW. You can then scroll through your entire LIST and note the status of each person. Read the “Calling Status” section on page 20A of the Standard part of this manual for an explanation of the different statuses you may see. Be sure to read the rest of the manual to discover the other powerful features of PhoneTree.

NOTE: If you need to stop a call session in progress, press the [STOP] key after the call in progress completes. You will then see “STOP CALLING? <Y>ES <N>O” on the display. Type <Y> to have PhoneTree stop calling.

Reference -> Setups

Setups

The Setup options in the PBaseWin20 software are very powerful and add enhanced functionality to your PhoneTree. Let's look at each set in turn.

Start by choosing “Talk to PhoneTree” from the PhoneTree menu. You will be greeted with the screen at right:

Creating a Setup Set

On the CHOOSE SETUPS tab, click the ADD NEW SETUP SET button. Name your Setup Set (for example “STACEY'S SETUPS”) and then click OK. You may notice that



now in the drop-down menu your just-created set appears, along with the Default set. If more than one person uses the PhoneTree Plus, or if you use it for different applications, you may want to create a different set for each different use or user. For example, the Youth Group Director may want to call kids from 3:00 PM (when school lets out) to 9:00 PM, but the Choir Director doesn't want to call the adult members until after 6:00 PM, because she would rather catch them at home after work.

Reference -> Setups, continued

The Time Tab

Now click on the TIME tab. Your screen should resemble the one at right. Here you can set the DON'T CALL BEFORE, the DON'T CALL AFTER and the CALL ON DAYS. To change the Don't Call Before and the Don't Call After times, just click on the time and type in the desired time, or use the arrow buttons (left column for hour, right column for minute). Click either the “A” button for AM, or the “P” button for PM. Choose the desired day(s) to call on by checking the box next to the desired day of the week.



The Dialing Tab

Click on the DIALING tab. You will see two check boxes, a TRANSLATE drop-down menu, and places to type in prefixes, suffixes and library numbers (L1, L2, L3 and L4). UN-check the TONE DIALING? option ONLY if you do not have Tone Dialing (most modern phone lines do support it). Keep WAIT FOR DIAL TONE? checked so that PhoneTree will wait for a dial tone before dialing. If you have Call Waiting enabled on your phone line and have problems with PhoneTree, try UNchecking this option.



Select a TRANSLATION METHOD (None, Simple or Table) to enable PhoneTree to automatically convert your phone numbers into a dialable form. You may need this to fix common phone number dialing problems, such as dropping an area code, adding “1” to the front of a long-distance number, etc. without requiring you to edit your entire list. Let's look at all three options.

None Choosing this option sends your phone numbers to the PhoneTree unit unmodified.

Simple Method Choose this option if you only need to make simple translations like dropping the area code or adding “1” before a long-distance number. Start by selecting SIMPLE from the drop-down menu, then click the EDIT METHOD button. Check the “Add 1 to Long Distance Numbers” option, and/or add any area codes that should be dialed as local numbers in the box on the right and click the ADD button. Once you have made all the



Reference -> Setups, continued

changes necessary, click the DONE button. You can view your translated phone numbers at any time by choosing the “Translated Phone” option from the View menu while on the main screen.

Table Method: Introduction The table method of phone number translation is a powerful tool. It will automatically convert phone numbers (as entered in your list) into dialable numbers regardless of how complicated your local phone companies dialing rules are.

The table method is based on the concept that given any area code and exchange (the 3 digit part of a 7 digit number, i.e.; the “555” part of 555-1212), it is possible to specify how to dial the number.

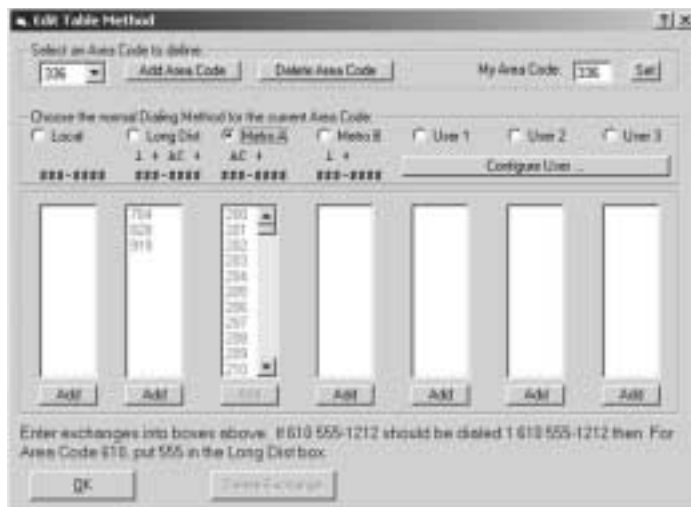
Most areas use only 2 dialing methods: local and long distance. A local number is dialed as the standard 7 digits (i.e.; 555-1212) and a long distance number is dialed as 1 plus the area code plus the local number (i.e.; 1 200 555-1212). In some areas, the phone company has introduced additional methods, which are referred to as Metro A and Metro B. These methods have been devised to generate more combinations of telephone numbers in a given area.

The Table method handles local, long distance, Metro A and Metro B as well as providing 3 additional (user definable) methods for ‘unusual’ local dialing rules.

CAUTION: Before reading further, make sure the Simple method is not adequate for your needs, as it is easier to set up and use.

Table Method: How To Choose the TABLE METHOD from the pull-down

menu on the Dialing tab of the PhoneTree dialog box, then click EDIT METHOD. Click ADD AREA CODE and type in your own area code. Press Enter, then click the Set button on the right to set this as your area code. Now



Reference -> Setups, continued

click ADD AREA CODE again and type in one or more of the area codes your PhoneTree will be dialing (hit Enter after each). [Any area codes you don't enter will be dialed as 11 digits; ie; 1 200 555-1212.] In the next box, click the option button that best describes how numbers in that area code should be dialed.

The box you chose as the default dialing method for that area code will fill with all of the possible exchanges in that area code. If there are exceptions to that rule, click ADD under the box that fits the exception case (one of the other Dialing Method choices) and type in an exchange and then hit the Enter key on your PC keyboard (that exchange is automatically removed from the default box). You must Add every exchange that is an exception to the rule. Press the Escape (ESC) key on your keyboard when done.

Repeat the above procedure for each area code that your PhoneTree will be calling. View your translated phone numbers at any time by choosing the “Translated Phone” option from the View menu while on the main screen.

Important—Please Note: For most area codes, including your local area code, you should choose long distance as the rule (since most of the eight hundred possible 3-digit exchanges are long distance). You then use the table in the front of your phone book to enter all of your local exchanges as exceptions to this ‘long distance rule’ under the local column.

Table Method: Using the User Settings If Local, Long Distance, Metro A and Metro B methods are not sufficient to handle your dialing requirements, you will need to create a USER method. Click the Configure User button and use the drop down boxes to specify the sequence that you wish to dial.

Because PhoneTree only holds 16 digits in its phone number field, you may create methods that generate UserLong! Errors.

When this happens, the User Method has created a number that is too long to fit in PhoneTree's memory, so PBaseWin will send the original (unmodified) number to the PhoneTree unit.



Reference -> Setups, continued

Basic Options Tab

Now click on the tab for BASIC OPTIONS. You should see seven options with checkboxes next to them.

Confirm with 9? Check to enable CONFIRM WITH 9 so each member must dial a 9 to hear your message. Note: with CONFIRM WITH 9, an introductory message must be recorded and this message must ask the listener to press 9 in order to hear to the main message. With this option enabled, PhoneTree will prompt you to record an introductory message.

Repeat Message? Check this option to have your message automatically repeat before hanging up. Automatically repeating a message extends the overall calling time. Note: you may enable “Star to Repeat” giving listeners the option to have a message repeated (see below). Select “Star to Repeat” or “Repeat Message”—don’t select both.

Listen to Calls? Select this option to hear calls as they are made. Note: to turn the speaker on and off, you can press the <S> key on the PhoneTree unit while calls are being made.

Use Quick Call? Check this box to speed up message delivery by calling only people who are at home. During the first round of calling, PhoneTree will only ring 3 times at a number before hanging up and going to the next number. The result is that answering machines, which traditionally pick up after the 4th ring, will be called last. During subsequent rounds of calling, PhoneTree will revert to its normal calling setups.

Use Hang-up Detect? Choose this option unless you experience problems with PhoneTree hanging up before your message is done.

Star to Repeat? This option will allow your listeners to repeat your message on demand by pressing their *(star) key while your message is playing. Select this option unless you experience problems repeating the message even when listeners do not dial *(star).

Use Short Messages? Short messages are up to 54 seconds long. If this option is not selected, the messages will be 80 seconds long. Message quality is better with the short message option which is highly recommended.

Advanced Options Tab

Finally, click on the tab for Advanced Options. You should see five items with drop-down menus next to them, and one option with a checkbox.



Reference -> Setups, continued

How Many No Answers Allowed? This is the number of attempts PhoneTree will try to connect to a phone number if a person or answering machine does not pick up. This count is reset each time you stop and restart a call session.

How Many Rings Are Allowed? This is the actual number of rings each time PhoneTree connects to a number. Remember that most answering machines pick up on the 4th ring.

Max ANS Machine OGM (sec)? This is the number of seconds allowed for the outgoing message when an answering machine is called. The default setting is 25 seconds and can be increased to 39 seconds. Change this setting only if a large number of your recipients have very long answering machine messages.

TT Reply Sensing? Set this option to Normal unless you experience problems with either false touch-tone replies or if your outgoing message contains sounds that are interpreted by PhoneTree as a touch-tone. This problem will usually show up when many of the people called seem to have responded with the same touch-tone (perhaps a digit you did not even request). Before changing this setting, re-record your message and watch PhoneTree’s LCD display as the message plays back. PhoneTree will tell you if it thinks there is a touch-tone in your message. If you continue to experience the problem, change this setting to LOW, or try using someone else’s voice (male voices don’t seem to produce this problem as often).

O For PhoneMate? Set this option to YES if you have purchased the optional PhoneMate accessory (a device that allows your members to leave a voice message for you) for your PhoneTree and you wish to use it during this calling session.

Count Replies? Check this box to have PhoneTree stop calling after the desired number of people press 9 in response to your question. If this option is selected, a HOW MANY? box appears where you can input the number of “yes” (9) replies you want from 1 to 999. This mode only recognizes 9 when dialed on touch-tone phones. This feature is especially good for seeking a limited number of volunteers, because PhoneTree will stop calling after the number of desired 9 replies are received.



What is a LIST?

PhoneTree stores a LIST with information about each person in your organization. A LIST can be made up of GROUPS or no GROUPS. A PhoneTree LIST contains a person's name, phone number, GROUP information, message status, and reply to questions. You can see and change the information in your LIST at any time as well as add new names, phone numbers and reassign persons to other GROUPS. PhoneTree can store up to a maximum of 990 names in a LIST and you can subdivide your LIST of 990 names into 10 separate GROUPS.

PhoneTree can deliver your message to your entire LIST, to 1 or more GROUPS, or to just 1 person. Each person in your LIST can be a member of one or more GROUPS. Calling always starts with the first person selected and continues until the last person is called. If a machine answers PhoneTree's call, your message is left after the beep and if a call cannot be completed, PhoneTree remembers and goes on to the next call. PhoneTree goes back to all uncompleted calls and again attempts to complete all calls.

When you start PBaseWin, it automatically opens the last LIST you used. If this LIST is not available, it creates an empty LIST called "unnamed.pdb" (Remember, don't shut off your computer without saving your calling LIST to a file!)

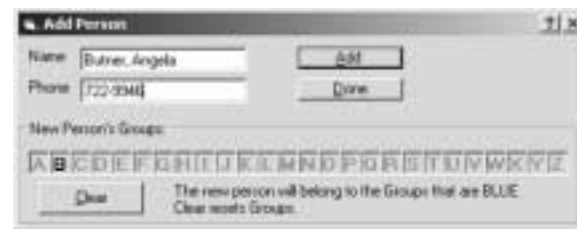
There are several ways to add names to your LIST. You can add names directly, or import data from a file created by another application (see details on how to do this in the "Sending and Receiving Data" section on page 11A).

Adding Names Directly

In the main window you can edit the names and/or phone numbers by clicking on that field and typing. The other fields (Status, Reply, Groups, Translated Phone) are not editable by the user. The mouse supports multiple selection methods including a right-click pop-up menu. In addition, PBaseWin supports use of the cursor keys, backspace and delete keys on your computer keyboard to accomplish tasks. Read more on these features by using the online help files by selecting "How to Use PBaseWin" from the Help menu.

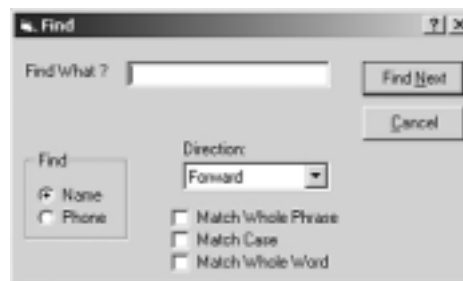
To add several names at the same time, choose ADD PERSON from the EDIT menu. Type the first person's name and press the TAB key to enter their phone number, including area code if necessary. (NOTE: if you type the last name first, then a comma and then the person's first name, the PBaseWin20 software can sort the data alphabetically later.) You may notice

that if you already have your GROUPS set up, you can put your members in their appropriate GROUPS as you enter them by clicking on the letter corresponding to the appropriate GROUP.



When finished, press the ENTER key on your keyboard, which is the same as clicking the ADD button with your mouse. You can now enter the next person's name and phone number. Continue in this way until the entire LIST is entered, at which time you should click the DONE button.

Once your LIST has been entered, PBaseWin has several powerful features to help you manage your list, including Find/Replace, Remove Duplicates, View Filters, Tagging and Sort.



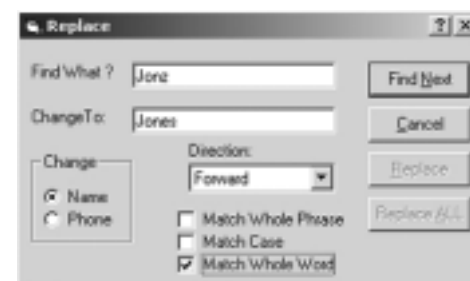
Find

Choosing FIND from the SEARCH menu allows you to enter text and then search either forward or backward from the present cursor location to find a match. Choose FIND NEXT to perform the actual search. Check the MATCH WHOLE WORD option when you wish to

exactly match a name or phone entry. If checked, searching for Fred will find Fred but not Freddy (not an exact match). If not checked, searching for Fred will find Fred and Freddy.

Replace

REPLACE lets you substitute one thing for another. For example, you could replace 555- with 1-202-555- in a phone number. You will be given the option to REPLACE (the current match only) or REPLACE ALL (every occurrence in your LIST).



Duplicates

DUPLICATES provides a tool for removing persons from your LIST who have the same name, phone number or both as another person. Choosing BOTH

Reference -> Lists and Groups, continued

means that person must have the exact same name **and** phone number to be considered a duplicate. When a duplicate is found you may keep both entries, remove the first person or remove the second person. Click on REMOVE ALL to automatically remove all duplicates (CAUTION: This action cannot be undone!).



View Filter

The VIEW -> FILTER is a useful tool that allows you to view only persons that have similar characteristics (GROUP membership, a common call status, etc.). This may be for viewing purposes, or for sending a specific set of members to PhoneTree for calling. When you activate the FILTER, persons who do not match the FILTER are no longer displayed (though they are still in your list). However, only those members that are VIEWed will be sent to PhoneTree. To do this, choose FILTER (Groups, Status, Reply)... from the VIEW menu. Once the CHOOSE FILTER CRITERIA pop up screen appears, select the GROUP(S) that you want to call, then click OK. Your screen will then display only those GROUPS that will be called and then you can send the LIST to PhoneTree. Once the LIST is sent to PhoneTree, press the [CALL] key and then press the [LIST] key on the PhoneTree unit. To get the entire LIST back on your computer screen after you have selected and sent a FILTERED LIST to PhoneTree, click on VIEW, then click on FILTER and after the CHOOSE FILTER CRITERIA pop up screen appears (see right), click on CLEAR at the bottom of the GROUP column and then click on OK and the original LIST will be displayed to your computer screen.

Note: You can combine the filter conditions to create very specific results. For example, you can set the filter to view only persons that are in

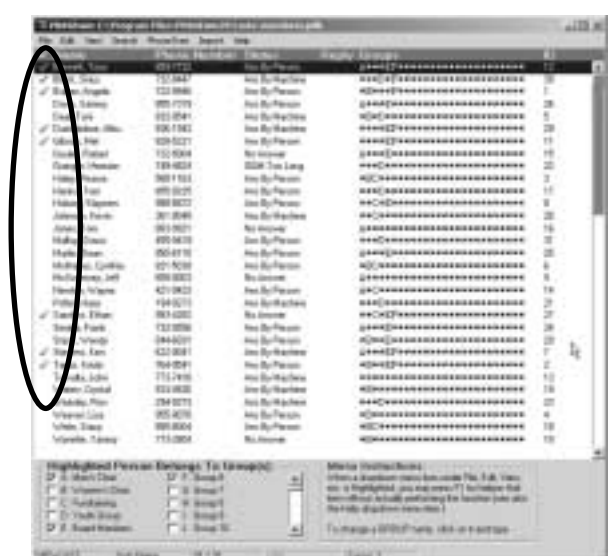


Reference -> Lists and Groups, continued

GROUP 1 or GROUP 2 who have a Call Status of Busy or Not Answered. To cancel the FILTER, choose LIST from the VIEW menu on the main screen.

Tagging Entries

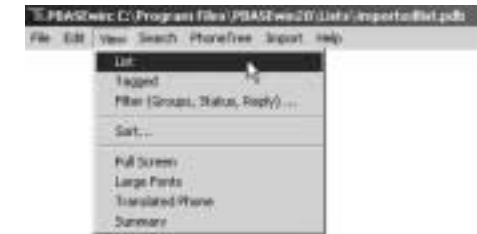
To TAG entries in your LIST simply means to mark them by clicking in the left-most column next to the name. (You can also TAG ALL or UNTAG ALL by choosing these options from the EDIT menu.) A check mark will then appear in that column next to the name. You can then CUT or COPY your tagged entries for inclusion in a new file, or create a new GROUP with them by changing the current VIEW by using FILTER and then choose TAG ALL (under EDIT) and then choosing GROUPS from the EDIT menu, where you can then select the “Add all TAGGED persons to selected GROUP(S)” option.



Sort

Normally entries are displayed in the order in which they were entered, and given an ID number based on that order. SORT lets you change the order in which members are displayed. You can use up to 3 SORT fields. It's easy to experiment and understand the results. Choose SORT from the VIEW menu. Choose an option from the FIRST KEY drop-down menu, such as NAME. If desired, choose an option for the SECOND and THIRD Keys, and click OK. Your LIST will now be displayed using the criteria you specified. To change it back, select VIEW -> SORT again, and click CLEAR ALL.

Note: The order of the names on



Reference -> Lists and Groups, continued

the screen is the order that the names will be called. If you are a PhoneTree expert, please note that PBaseWin automatically turns OFF the PhoneTree SORTED LIST option.

Groups

Each PhoneTree unit (and each PBaseWin file) contains one, and only one, LIST of names and phone numbers (like the phone book). To divide this single LIST, you must use GROUPS. Each member of the LIST may belong to any combination of the GROUPS (including one, none or all). For example consider the following LIST with members Bob, Sue, Mary and Bill. Let's assume Bob is not in any GROUP, Sue is in GROUP 1, Mary is in GROUP 2, Bill is in GROUPS 1 and 2.

LIST	GROUP 1	GROUP 2
Bob		
Sue	✓	
Mary		✓
Bill	✓	✓

With this one simple LIST, and using only two GROUPS, there are several possible ways to make calls:

Command	Action	Members Called
CALL LIST	Calls all members	(Bob, Sue, Mary & Bill)
CALL GROUP 1	Calls members of GROUP 1	(Sue and Bill)
CALL GROUP 2	Calls members of GROUP 2	(Mary and Bill)
CALL GROUP 1 & 2	Calls members of GROUPS 1 & 2	(Sue, Mary and Bill)

Naming your Groups

Give each GROUP a NAME that describe its members (like Choir or Executive Committee). Remember that PhoneTree has only one message, so when you call multiple GROUPS, you must be sure that the message you record is applicable to all persons being called.

10 GROUPS or 26?

PBaseWin lets you divide your LIST into 26 working GROUPS, while the PhoneTree unit can hold only 10 numbered GROUPS at any time. This means that while you can keep a LIST on your computer with more than 10 GROUPS, when you send it to PhoneTree you will have to send no more than 10 GROUPS at a time.

Similarly, PBaseWin lets you store a large LIST, though the PhoneTree unit can only accommodate 990 from that LIST at one time.

Reference -> Lists and Groups, continued

If there are 20 GROUPS (A through T) in your PBaseWin LIST, you might choose to send 8 of those GROUPS as GROUPS 1 through 8 to PhoneTree today (with one message) and a different 7 GROUPS as 1 through 7 tomorrow (with a different message). **Tip:** If you're just getting started, it is a good idea to limit yourself to using only the first 10 GROUPS in PBaseWin.

GROUP Shorthand

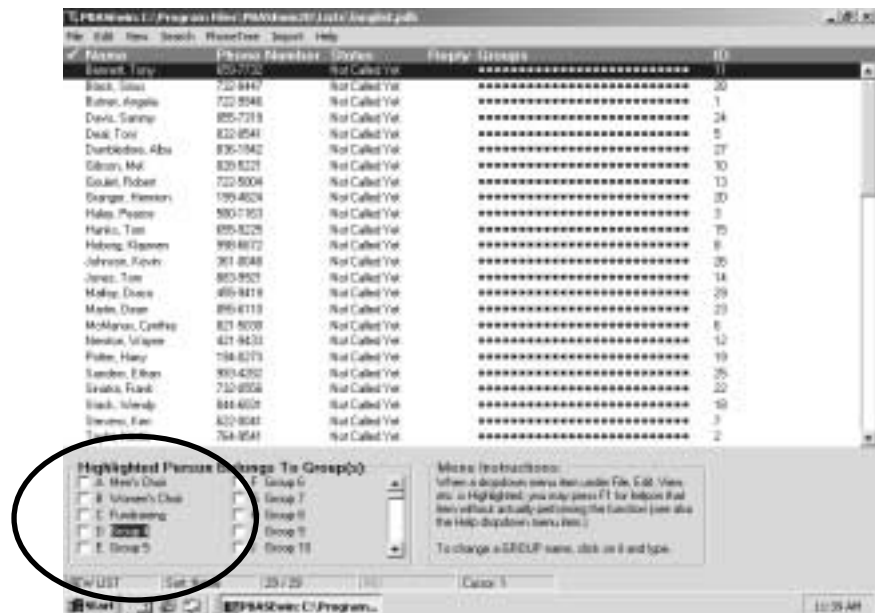
PBaseWin uses a type of shorthand to allow you to quickly see which GROUP(S) each person belongs to. This shorthand is a line of asterisks with capital letters mixed in, to the right of each member's REPLY on the main screen. Each letter represents a specific GROUP that that member belongs to. The shorthand A*C*****X** means that this member belongs to GROUPS A, C and X.

Changing GROUP Membership

To change GROUP membership, move the cursor to the person who you want to change, and use the check boxes in the GROUP Box at the bottom left.

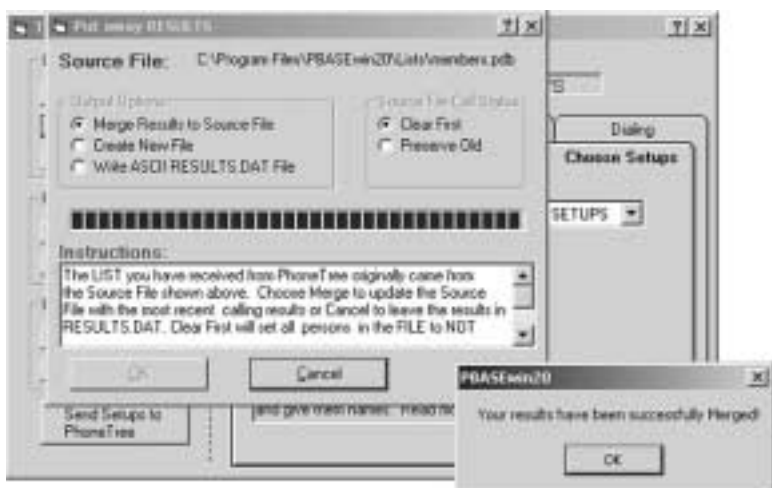
Changing a GROUP NAME

Click on the GROUP NAME to edit it.



Reference -> Checking Call Status

The **Call Status** of a recently completed call job can be easily obtained by opening the PBaseWin20 application and choosing “Talk to PhoneTree...” from the PhoneTree menu. Once the PhoneTree Setup screen appears, click on “Get From PhoneTree” under the topic of LIST Transfers. The call status of each number will then be transmitted from the PhoneTree to your computer screen. You will be asked to create a new file or merge results with an existing file. Click the OK button to begin the transfer.



Note: if your call job is not yet completed, PhoneTree will stop calling when the data has been sent to your computer. Either send a new LIST to PhoneTree based on the Status data, or press the [CALL] <R> buttons on the PhoneTree unit to resume the call job. Once the transfer of data is complete, you will see your LIST with new information in the Status column. You can now Sort or View your LIST using the entries in the Status column as criteria. In addition, you can get a useful Summary of the call session by choosing “Summary” from the View menu, where you can see at a glance the number of calls completed, not completed, not deliverable and the reasons for each.

Call Status Summary			
Completed:		Not Completed:	
Ans By Person	16	Not Called Yet	0
Ans By Machine	9	No Answer	5
Unknown Status	0	Busy	0
Not Selected	0	Learned	0
		9 Not Confirmed	0
Not Deliverable:			
Call Failed!	0	Not Accepted	0
Called Max	0	Hung Up Early	0
No Connect!	0	Fax/Modem	0
TELCO	0	OGM Too Long	1

Reference -> Checking Call Status, continued

While calls are being made, PhoneTree displays who is being called, calls attempted and calls completed on its LCD display. After the Call Status has been sent to your computer, this information will show up in the Status column. For each person you may see one of the following:

Call Completed—message delivered to a person.

Not Called Yet—person has not been called yet.

Not Selected—person not selected to be called.

Telco—telephone company message.

Phone Was Busy—line was busy on last call.

Called Max Times—PhoneTree called this number the maximum number of times (set in the Advanced Menu).

Did Not Answer—call not answered after the specified number of rings.

Ans By Machine—message delivered to a machine.

Learned Machine—learned machine, PhoneTree will call back.

9 Was Not Dialed—person didn't dial 9, will call back.

Never Dialed 9!—person didn't dial 9 after max attempts.

Called 15 Times—message not delivered after 15 try limit.

Failed to Connect—no signal detected after dialing.

Not Delivered—PhoneTree cannot deliver message, check phone #.

OGM Too Long—Outgoing message of the member's answering machine is too long.

Note: All call statuses are cleared from the PhoneTree unit when you press the [CALL] key followed by any key except the <R> or [STOP] keys.



Using Data From Other Programs

Step One: Export Your Data

If your database application can produce an ASCII, Comma Delimited, CSV or a PBase file type, then you will be able to import the data into your PhoneTree. Different applications will have different ways of saving data into one of these formats. There will probably be an Export or Save As command in the file menu. Read the documentation that came with your database application for instructions on how to do this. For simplicity, save the exported data in the LISTS folder within the PBaseWin20 folder.

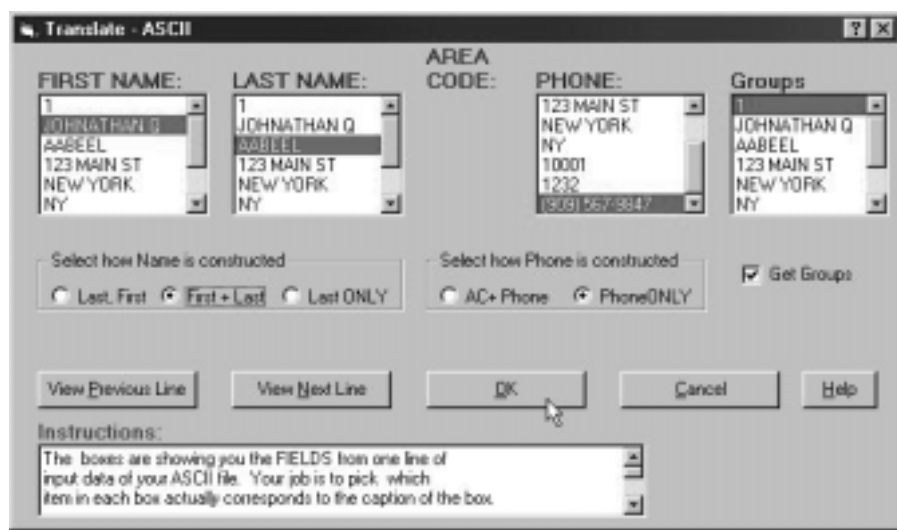
Step Two: Open Your Data

Launch PBaseWin and choose ASCII (or the appropriate method) from the Import menu. You will then be able to navigate to your file with the LOOK IN dialog box (shown at right). When you've located the file, click Open.



Step Three: Translate Your Data

Once you've opened your file, a Translation pop-up screen will appear (see below), asking you to confirm some basic information such as "How Name is constructed," "How Phone is constructed" and even "Get Groups."



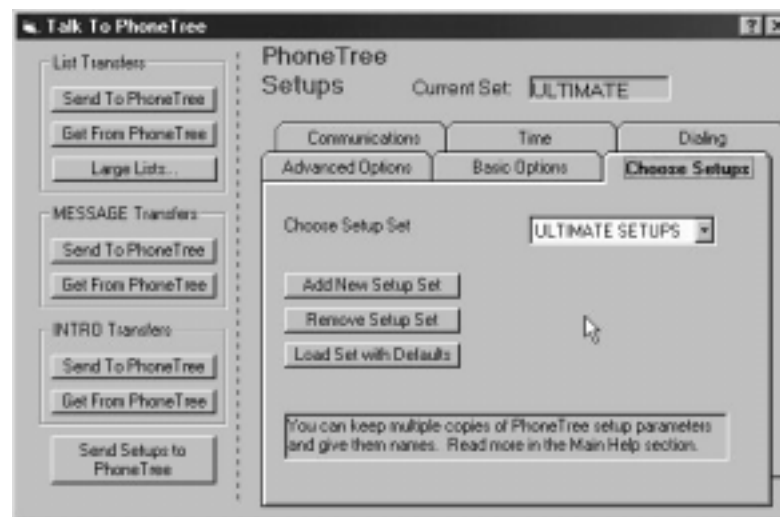
Three columns in the Translation pop-up screen have headers: First Name, Last Name and Phone. Within each of the columns select and highlight the correct information to match the column header (highlight the first name in the First Name column, for example).

If any of the information contained in the three columns is merged (on the same line as another column item), then PhoneTree will not be able to read the data correctly—go back to your program where you originally created the export file and try to create another ASCII, Comma Delimited, or CSV file type.

If all the information looks good and you've chosen the items that correspond to the captions on the boxes, then click OK. You will then see a small progress bar and then a box that says "Import Complete!" Click OK. You will then be prompted to save your new file as a PBase file. Do this, and then you will be ready to send your new data to the PhoneTree unit.

Sending LISTS to PhoneTree

Once a file has been properly imported into PBase Win20 or once you have manually added names and phone numbers into PBase Win20, the LIST is ready to be transferred to the PhoneTree Plus unit. To transfer a LIST or GROUP(S), choose TALK TO PHONETREE from the PhoneTree menu. On the upper left of the PhoneTree Setups Pop-up Screen (in the LIST Transfers box), click on the SEND TO PHONETREE button and the LIST will be sent to the PhoneTree unit (see below).



Sending Setups to PhoneTree

Sometimes when clicking on PHONETREE and TALK TO PHONETREE, a default message appears stating that “Default Setups cannot be modified.” However, a new set of setups can be created simply by going to the “Choose Setups” tab and clicking on “Add New Setup Sets,” typing in a new setup name, then click on “OK.” (See above.) Once the new setup name appears on the screen, all setups can be changed or modified, such as days to call on, hours to call, number of rings, etc. Once the Setups or calling parameters are changed or finalized, the Setups need to be sent to PhoneTree by clicking on the “Send Setups to PhoneTree” button located on the bottom left of the PhoneTree Setups Screen.

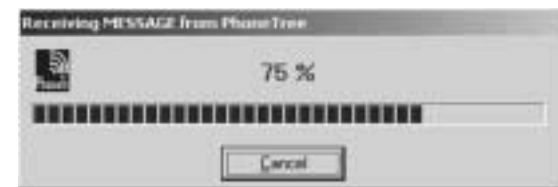
Once your SETUPS and your LIST have been sent to PhoneTree, all that is left to do is to record the message and press the [CALL] and [LIST] keys on the PhoneTree unit to initiate the call session. The [LIST] key is pressed because it is assumed that your selection of who you are going to call has already been made via your prior selection of the SEND TO PHONETREE button in the PhoneTree Setup screen of the PBaseWin20 application.

Receiving Data from PhoneTree

Once your call job is complete, you will probably want to check the Call Status. Choose TALK TO PHONETREE from the PhoneTree menu. Once the PHONETREE SETUP screen appears, click on GET FROM PHONETREE under the topic of LIST TRANSFERS. You will then be asked to create a new file or merge results with an existing file. After you have made the desired choices, click the OK button to begin the transfer. Read more on this under the “Checking Call Status” topic on page 10A.

Saving Recorded Messages

You can easily save your recorded messages on your computer for future use. Just click on the “Get From PhoneTree” button (in the MESSAGE Transfers box on the left of the TALK TO PHONETREE) and you will be prompted to save your message (the default location is the Voice folder in the PBaseWin application folder, see below). When you have chosen a name and clicked the Open button, a status bar will appear, detailing the progress of the message file transfer. Once complete, you will then be able to send your message back to PhoneTree anytime you wish to use it again (by clicking the SEND TO PHONETREE button in the MESSAGE TRANSFERS box on the TALK TO PHONETREE dialog). The INTRO Transfers work the same way (you’ll need an INTRO message if you have selected the CONFIRM WITH 9 option—read how on page 6A).



Hints for Message Recording

Message recording is exactly the same on the PhoneTree Plus as it is on the PhoneTree Standard, therefore please turn to page 23B for tips on getting the best recordings for your messages. For instructions on how to save messages to your computer's hard drive, read the preceding section, "Saving Recorded Messages."

Remote Access

The commands and instructions for Remote Access are exactly the same on the PhoneTree Plus as they are on the PhoneTree Standard, therefore please turn to page 24A for instructions on how to access your PhoneTree remotely, from any touch-tone phone.

Sample Messages

The common messages that you would be likely to use are the same on the PhoneTree Plus as they are on the PhoneTree Standard, therefore please turn to page 24B for examples on ways to get the most out of your PhoneTree.

Troubleshooting

Many questions relating to general operation are the same on the PhoneTree Plus as they are on the PhoneTree Standard, therefore please refer to page 25A for troubleshooting examples that apply to both the PhoneTree Plus and the PhoneTree Standard. We have printed here only questions that apply to the PhoneTree Plus (hardware and software).

Hardware and Connection Questions

Problem: I'm having trouble connecting PhoneTree to my computer.

Source: You may have a COM port conflict.

Solution: Try the following steps in order:

1. Plug in PhoneTree using the supplied wall transformer. It should CHIME and display 'Enter the Time.' Be sure the outlet is turned on (or try another outlet). If PhoneTree does not CHIME, call PCS for assistance.
2. Connect one end of the supplied serial cable (9-pin cable) into the back of PhoneTree and to the 9 or 25 pin SERIAL PORT connector on the back of your PC (it has small PINS [not holes] to connect to).

Troubleshooting, continued

3. If it is a 25-pin connector, use the supplied adapter between the supplied cable and your PC. Note: A 25-pin connector with holes (not pins) is a parallel printer port, not a serial port.
4. Start the PBaseWin software and choose TALK TO PHONETREE from the PhoneTree menu. Then click the COMMUNICATIONS tab on the right.
5. Choose the COM PORT that corresponds to the connector on the back of your PC. The SMILEY-FACE becomes "Happy" when PhoneTree is detected (see below). A message will appear indicating the status of that port. If the port is not available, a POP UP BOX will describe the problem. Try This: Use the SCAN PORTS button to scan all of your COM ports automatically.



6. Connect either of PhoneTree's telephone jacks to an analog telephone line using the supplied telephone cable. Note: The other jack is a "courtesy" jack for a telephone, modem or other telephone device.
7. Click the GET VERSION button. If you get a response (like V3.XX) in the box, you're done! If not, try the next tip.

Question: I get messages that COM ports can not be found. How can I get PhoneTree to work?

Source: Generally speaking, COM port problems arise as a result of the number of COM ports (internal and external) that a computer has, the number of devices connected to the computer and whether or not those COM ports are shared or not shared. COM port problems can be

Troubleshooting, continued

frustrating, though generally only a very small percentage of computers will experience this problem.

Solution: Try these steps in order:

1. Be sure the SERIAL CABLE is firmly attached at both ends and that the PhoneTree display is ON. Remember, if you're not sure, ask a computer-literate friend or co-worker for assistance.
2. Verify cable connections to PhoneTree and to the computer (see information in the tip above).
3. Verify that PhoneTree is powered on and chimed (display is on).
4. Check the available COM Ports in the Device Manager by right-clicking the MY COMPUTER icon on your computer desktop, then left click the PROPERTIES option. Select the DEVICE MANAGER tab and scan the list for Ports (COM & LPT), and click the plus (+) sign to the left to see a list of the only possible COM ports. (Just because they are shown does not mean they are available).

Additional Notes: If you have a SERIAL type mouse, it is probably using COM 1 and is also probably plugged into the COM 1 connector on the back of your PC. If you have an internal modem, it is also using a COM port. The Windows 95 operating system (or some device drivers, or both) do not support INTERRUPT SHARING the way DOS did (Usually COM1 and COM3 share an interrupt, as do COM2 and COM4). Check the PhoneTree website for much more information on resolving these conflicts at (www.phonetree.com).

Question: Can I install PhoneTree Plus and PBaseWin on my network?

Source: Networks

Solution: PhoneTree Plus and PBaseWin can be installed on a network workstation, but it is not designed to be installed on a network server as a shared application.

Software Issues

Question: Why can't I send a large LIST (greater than 990) to PhoneTree?

Source: Calling Large List

Solution: If after you have clicked on large LIST and you get a message stating "Large LIST in Process", click on "kill the current job" and then click on "begin new job" and begin using the new large list.

Problem: I'm having trouble transmitting files from PhoneTree to my computer (it starts but then locks up!)

Troubleshooting, continued

Source: You may need to adjust the transmission speed for certain computers.

Solution: Set the Serial Com Delay in PhoneTree's Advanced Menu. Allows you to slow transmission of data from PhoneTree to your PC. Higher numbers indicate larger delays. Select a non-zero value only if you experience a problem transferring data from PhoneTree to your computer. [Range 0-9, Default =0]. See page 22A of the Standard part of this manual.

Question: I attempted to import a LIST with little success—why?

Source: Files imported by PhoneTree must be of three types—ASCII, COMMA DELIMITED, or CSV.

Solution: Since there are literally thousands of programs that can be used to store calling LIST and created ASCII files, the user must insure that his or her program will create or convert the file to ASCII (comma delimited), COMMA DELIMITED or CSV, otherwise PBaseWin will not recognize or import the file. Consult the documentation that came with your membership management program for more details.

Question: My membership program says that it has exported a file to PhoneTree, but PhoneTree could not find the file—why?

Source: Unless the "ASCII (comma delimited), "COMMA DELIMITED," or "CSV" file is actually placed in the proper location within the PBaseWin directory structure, PBaseWin will not know where to look for the file to be imported.

Solution: If PBaseWin cannot find the file to be imported, then the user may want to try to SAVE AS or EXPORT to a known folder or even to a floppy disk.

Question: PhoneTree was set to call at a specific time but didn't, what's wrong?

Source: When setups are sent to PhoneTree, the computer time is also downloaded to the PhoneTree.

Solution: First review all of the settings or calling parameters in PBaseWin—including your computer clock.

Question: A call session didn't begin when I wanted it to.

Source: Send Setups to PhoneTree.

Solution: Be sure to "Send the Setups To PhoneTree" and check that the correct setups are entered into PBaseWin. Setups must be sent to PhoneTree each time there has been a change in the setups.

Problem: I can't get PhoneTree to recognize the LIST from my database program.

Source: You need to export the data as an ASCII comma delimited file.

Troubleshooting, continued

Solution: Read the detailed instructions in the Sending/Receiving Data section (page 11A).

Question: Can I get a better indication of the results of my calls if I use PBaseWin software?

Source: [STATS] key results on PhoneTree.

Solution: PhoneTree and PBaseWin reports the same call status information but with PBaseWin the call status information can be more easily viewed, reports can be printed, and a Summary Report is provided for quick review. Remember, you must transfer the call results back into PBaseWin in order to view them on your computer screen.

Question: How can I find out if successful calls were made without having to look up every name?

Source: Status Reports

Solution: PBaseWin with PhoneTree Plus permits the owner/user to obtain a viewable or a printable report on any calling session. To get the results of the calling session, open the PhoneTree application, click on “PhoneTree” and click on “Talk to PhoneTree”—then under LIST Transfers click on “Get from PhoneTree” to get a viewable report. Once the report appears on screen, the owner/user can click on “View” and click on “Summary” of the report to get a summary. To print copy a of the “Summary Report and/or the Status Report” go to “File” and click on “Print” and then select the type of report to print. See page 10A for more information.

Question: What does “TELCO MESSAGE” mean?

Source: Telephone Company Messages

Solution: TELCO Messages means a TELEphone COmpany MESSAGE detected by PhoneTree. These messages could represent non-working numbers, disconnected numbers, an out of order number, or other situations for which a telephone company has placed a message on a number.

Question: What does “Called Max Times” mean on my status report?

Source: Max No Answers

Solution: Called Max Times means that a number has been called the maximum times specified under the “Max No Answers” settings and that there has not been an answer from that number—settable from 1 to 15 attempts.

Question: What does “OGM Too Long” mean on my status report?

Source: Answering Machines and Answering Services

Solution: “OGM Too Long” on the status report refers to the outgoing message of an answering machine or an electronic answering service that PhoneTree has called. OGMs can also include a non-standard telephone

Troubleshooting, continued

company message. You may set the OGM time up to 39 seconds to allow more time for answering machines or services before PhoneTree hangs up and moves on to the next number.

Question: My city uses “Metro Dialing”—how do I get PhoneTree to dial correctly?

Source: PhoneBase can handle virtually any local or long distance calling rules.

Solution: Read the detailed instructions on page 5A of this manual (Dialing Tab: Table Method).

Question: How do I call just one or two GROUPS instead of the entire LIST?

Source: Calling Groups

Solution: Within PBaseWin click on View, click on Filters and then under Group, highlight the GROUP(S) which you want to call, then click on OK. Once the selected GROUPS appear on your screen, click on PhoneTree and Talk to PhoneTree and then under “LIST Transfers” click on “Send to PhoneTree.” After the LIST has been transferred to PhoneTree, return To View then click on Filters and under Groups, unhighlight the GROUP(S) selected, then click on OK and the total master LIST will return to the viewing screen.

Safety Information

In order to get the most out of your new PhoneTree messaging system, it is important that you read and follow the safety guidelines on page 29B of the PhoneTree Standard section of the manual. The safety guidelines apply to both PhoneTree Plus and the PhoneTree Standard.

Warranty and Upgrade Information

Because the warranty and upgrade information applies equally to both PhoneTree Standard and PhoneTree Plus, please turn to page 30A.

The PhoneTree Website

Visit us at www.phonetree.com, where you have access to free software updates, many answers to frequently asked questions, and answers to your specific questions via our free online tech support, or call Tech Support directly at 336.722.0087.

Contacting Us

By Phone

Our technical support staff is available from 8:30 AM to 5:00 PM Eastern Time, Monday through Friday at **336.722.0087**. To expedite resolution of your problem, please be near your PhoneTree and your computer, if applicable. If possible, use a different telephone line than PhoneTree.

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

By E-Mail

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

By Mail

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

Sales Contacts

Sales Phone: 800.951.8733
Sales E-Mail: sales@phonetree.com
www.phonetree.com

Regulatory Information

FCC REGISTRATION

Your PhoneTree has been registered with the Federal Communications Commission (FCC) and complies with the standards in Part 68 of the FCC rules.

The FCC rules require that we provide you with the following information:

- 1) The FCC requires that you connect this product to the nationwide telephone network through a modular telephone outlet or jack type USOC RJ-11C or RJ-11W.
- 2) The FCC requires that upon request of your local telephone company, you provide the following information:
 - A) The "line" to which you will connect the telephone equipment (i.e., your phone number), and
 - B) The telephone equipment's FCC ringer equivalence number (REN) found on the bottom of your PhoneTree.

The REN is useful in determining how many devices you may connect to your telephone line and still have them ring when your line is called. In most, but not all areas, the sum of all RENs should be 5 or less. You may want to contact your local telephone company.

- 3) If it is determined that your telephone equipment is malfunctioning, the FCC requires that it not be used and that it be disconnected from the modular outlet until the problem has been corrected. Repairs to this telephone equipment can only be made by the manufacturer or its agents or others authorized by the FCC. For repair procedures, follow the instructions in the PCS Limited Warranty.
- 4) If your product is causing harm to the telephone network, the telephone company may temporarily discontinue your telephone service. If possible, they will notify you before interrupting

service. If advance notice is not possible, you will be notified as soon as possible. You will be given the opportunity to correct the problem and informed of your right to file a complaint with the FCC. Your telephone company may make changes in its facilities, equipment, operations or procedures that could affect the proper functioning of your PCS product. If such changes are planned, you will be notified.

INTERFERENCE AND FCC RULES PART 15

Some telephone and computer equipment generates, uses and can radiate radio-frequency energy and, if not installed and used properly, may cause interference to radio and television reception.

Your PhoneTree has been tested and found to meet the standards for a Class B digital device, as specified in Part 15 of the FCC Rules. These specifications are designed to provide reasonable protection against such interference in a residential installation. However, there is no guarantee that interference will not occur in a particular installation.

If your PhoneTree causes interference to radio or television reception when it is in use, you might correct the interference with any one or all of these measures:

- 1) Move your PhoneTree away from the equipment that is receiving the interference.
- 2) Re-orient the receiving television or radio antenna.
- 3) Relocate the television, radio, or other receiver with respect to your PhoneTree.
- 4) Plug your PhoneTree into an AC outlet that is not on the same circuit as the one used by your radio or television.

If you need assistance, you may call PCS at (336) 722-0087.

PCS



PhoneTree®

Operating Instructions and First Use

PhoneTree®

S T A N D A R D



Revised 1/01

Table of Contents: PhoneTree Standard

Installation and First Use	17A
Reference	18B
Important Keys	18B
Key Commands	19B
Lists, Groups and Calling Status	20A
Menus	21A
Frequently Used Commands	22B
Hints for Message Recording	23B
Remote Access	24A
Sample Messages	24B
Troubleshooting	25A
Safety Information	29B
Warranty & Upgrade Info	30A
Regulatory Information	16A

Installation and First Use

- 1] Plug the provided wall transformer into a wall outlet and insert the black connector into PhoneTree. PhoneTree will perform several diagnostic checks and will then chime.
- 2] Connect one end of the provided phone cord into the back of the PhoneTree (in either phone jack) and plug the other end into a nearby analog telephone jack (see right).
- 3] "ENTER THE TIME" will appear on PhoneTree's display (see photo at right). Enter the correct time by using the blue numbered keys on the PhoneTree. Enter "P" for PM or "A" for AM. NOTE: Any time the power is interrupted or disconnected, the time will need to be re-entered this way.



Installation and First Use, continued

- 4] Press [ENTER] and "TODAY IS" will appear in the display. Using the left and right arrow keys, highlight the current day of the week.
- 5] Press [ENTER] and "DON'T CALL BEFORE" will appear in the display. Enter the time of day you want PhoneTree to begin calling. Don't forget to set the appropriate AM or PM.
- 6] Press [ENTER] and "DON'T CALL AFTER" will appear in the display. Enter the time of day you want PhoneTree to stop calling. Don't forget to set the appropriate AM or PM.
- 7] Press [ENTER] and "CALL ON: SMTWTFS" will appear in the display. PhoneTree will call on the days of the week if a letter corresponding to the specific day is displayed. If you do NOT want PhoneTree to call on a specific day of the week, use the left and right arrow keys to highlight the desired day, and press the [SPACE] key at the lower left of the keypad. This will cause the day of the week to change from a letter to a STAR [*]. If you make an error, press the STAR [*] key again. After selecting the specific days of the week to call, press the [STOP] key. PhoneTree will now display the correct time in the display. NOTE: Read more about the other setup options, including the Advanced Menu options, in the "Menus" section on page 21A.
- 8] To record your message, press the [REC] button. After the beep, immediately start speaking your message. You will see a countdown of remaining time on the PhoneTree display. Once you have completed your message, press the [STOP] button and your message will be played back to you. PhoneTree can only store one message at a time. If you don't like your message, press the [REC] button and record over the old message.

Read the "Hints for Message Recording" on page 23B for more information on recording. Any time the power is interrupted or disconnected to the PhoneTree, the message will need to be re-recorded.
- 9] Next, you will create the LIST of all the people PhoneTree will call. For convenience, your LIST can be divided into smaller GROUPS.
 - a) Press the [ADD] button. "ADD: ENTER NAME" will appear in the display. Using the black letter keys, enter the person's name (up to 16 characters). (NOTE: PhoneTree will sort your LIST alphabetically, so it is a good idea to enter last name, a comma and the first name.)
 - b) Press [ENTER] and "ADD: PHONE NO." will appear in the display. Using the blue number keys, enter the person's phone number. Be

sure to include all digits required to dial their number. If your phone line requires a 9 to get an outside line, do not enter it here, instead see the section on Advanced Options (page 21B).

c) Press [ENTER] and "ADD: GROUPS" will appear in the display. Using the blue number keys, enter the numbrs corresponding to the GROUP or GROUPs that this person belongs to. Each GROUP can be named later, and a person can belong to none, one, or more than one calling GROUP.

d) Press [ADD] and repeat for these steps for each person in your list. When you're finished entering, press [STOP].

10] Time to start calling! First determine if you want PhoneTree to call your entire LIST, just one, or more than one GROUP.

To call your entire LIST:

a) Press [CALL] and then [LIST]. PhoneTree will call everyone on the LIST and deliver your message.

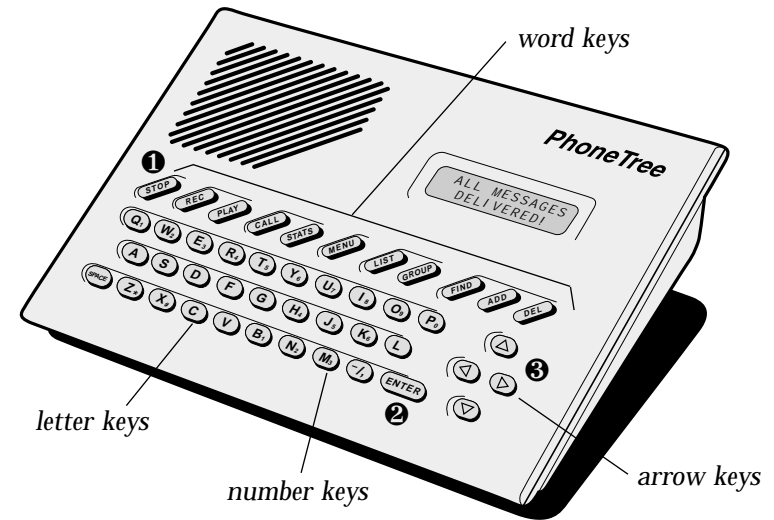
To call one or more GROUPs:

b) Press [CALL], then [GROUP]. You will see "Select GROUPS and press ENTER" in the display. Choose one or more GROUP(s) by pressing their number and then press [ENTER]. PhoneTree will call only the people in the GROUP(s) you selected.

Now your new PhoneTree should be busy making calls!

When the call session is completed, you will want to check the Call Status. Press the [STATS] key, and then press <V> for <V>IEW. You can then scroll through your entire list and note the status of each person. Read the "Calling Status" section on page 8 for an explanation of the different statuses you may see. Be sure to read the rest of the manual to discover the other powerful features of the PhoneTree, including Remote Access, which allows you to use PhoneTree from any touch-tone phone (page 24A).

Note: If you need to stop a call session in progress, press the [STOP] key. Once any call in progress completes, you will then see "STOP CALLING? <Y>ES <N>O" on the display. Type <Y> to have PhoneTree stop calling.



Types of Keys

When entering commands and looking at the PhoneTree display, you will be prompted to select one or more options which may require you to push a:

word key such as [LIST]

letter key such as <Y>

number key such as "5"

arrow key (up, down, left, right), or

a combination of the above keys

The [STOP] Key ❶

Perhaps the most important key on your PhoneTree keyboard is the [STOP] key, which is used after doing almost anything with your keyboard.

Use the [STOP] key after:

- | | |
|----------------------|----------------------|
| Setting the time | Viewing a list |
| Recording a message | Viewing a group |
| Playing a message | Finding a name |
| Calling members | Adding a name |
| Obtaining a status | Deleting a name |
| Setting menu options | Most other functions |

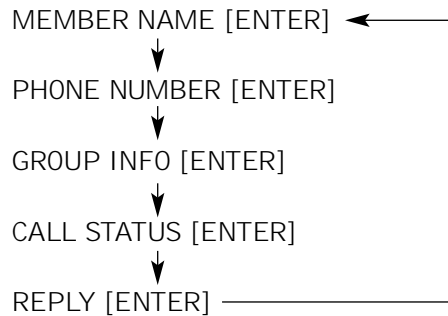
Note: if you don't know which key to use next, press [STOP].

Reference -> Important Keys, continued

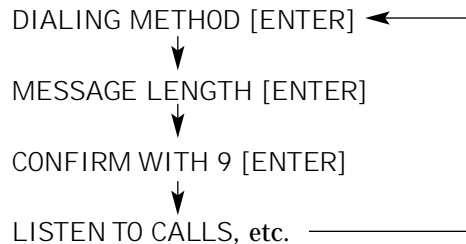
The [ENTER] Key

Press the [ENTER] key to move on to the next choice or selection.

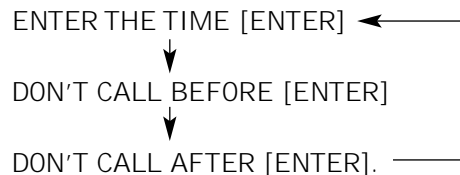
If you are looking at your [LIST], pushing [ENTER] lets you view or change member information:



If you are checking or changing your [MENU], SETUP, use [ENTER] to cycle through the options:



If you are checking or changing the [MENU], <T>IME, press [ENTER] to scroll through the options:



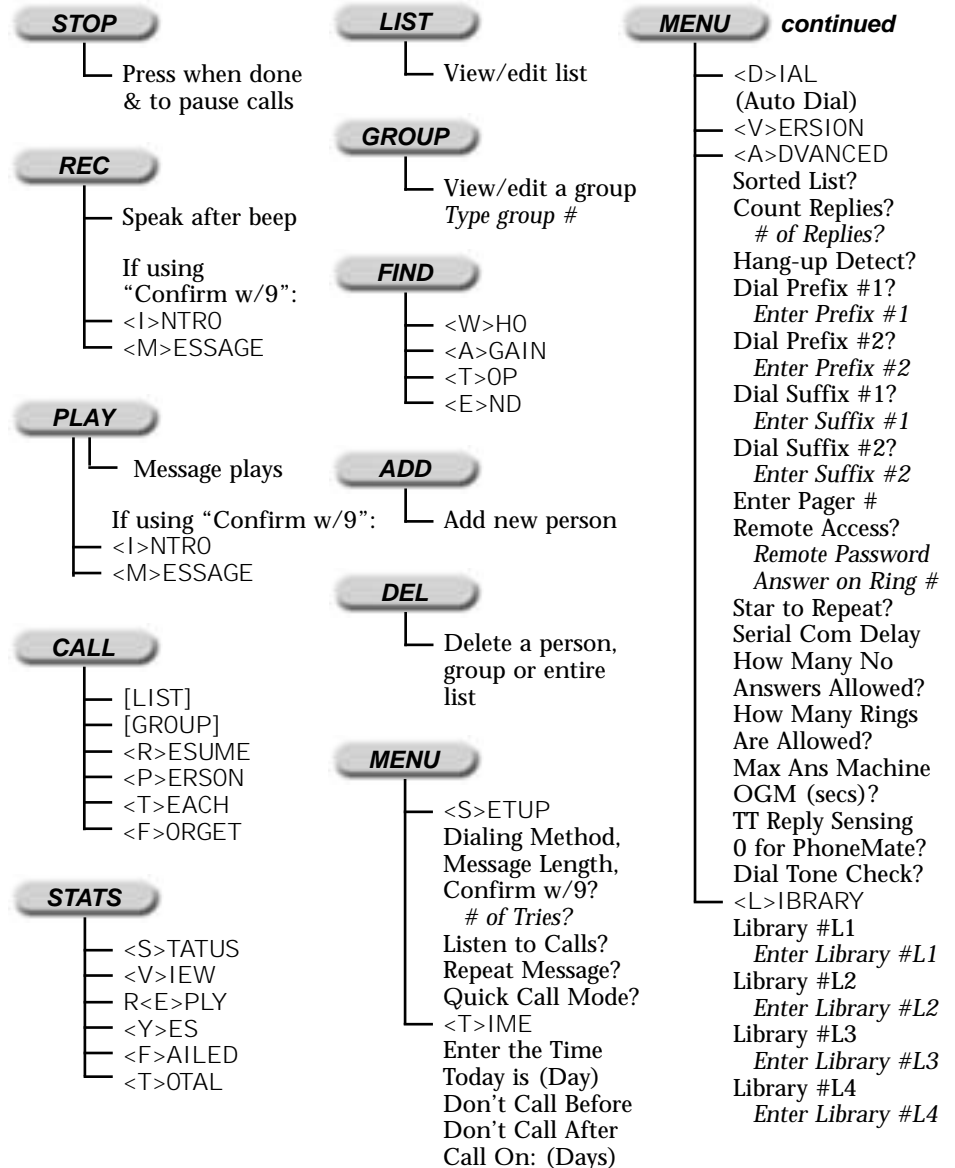
Arrow Keys

Like the [ENTER] key, the up and down arrow keys can be used to move forward or backwards through a menu, SETUP selections, LIST, and GROUPS.

The left and right arrow keys can be used to move the blinking cursor left or right and to select between available menu options, like <Y>es and <N>o.

Reference -> Key Commands

When you need to customize PhoneTree for a special calling application, you'll find a lot of power behind its simple keys. Below is a summary of all PhoneTree commands and where to find them.



Note: Items in italics appear only if the preceding menu item is enabled.

continued in next column

What is a List?

PhoneTree stores your LIST with information about each person to be called. The LIST can be divided into smaller groups if desired. A PhoneTree LIST contains a person's name, phone number, group information (optional), call status, and TouchTone digit reply to a question. You can see and change the information in your LIST at any time as well as add new names, phone numbers and reassign persons to other GROUPS.

PhoneTree can store up to a maximum of 990 names in a LIST and you can subdivide your list of 990 names into 10 separate GROUPS. Each person in your LIST can be a member of one or more GROUPS.

PhoneTree can deliver your message to your entire LIST, to 1 or more GROUPS or even to just 1 person. Calling always starts with the first person selected and continues until the last person is called.

If a machine answers PhoneTree's call, your message is left after the beep. If a call cannot be completed, PhoneTree remembers and goes on to the next call. PhoneTree goes back to all uncompleted calls and again attempts to complete all calls if it is within the calling hours you have selected.

Note: Turn to page 7A in the Plus section of this manual for more detailed information about Lists and Groups.

Calling Status

While calls are being made, PhoneTree alternately displays who is being called, calls attempted and calls completed on its LCD display.

For each person you may see one of the following:

CALL COMPLETED—message delivered to a person.

NOT CALLED YET—person has not been called yet.

NOT SELECTED—person not selected to be called.

TELCO—telephone company message (check the number).

PHONE WAS BUSY—line was busy on last call.

CALLED MAX TIMES—Unable to deliver message after calling the max number of times (set in Advanced Menu).

DID NOT ANSWER—call not answered after the specified number of rings.

ANS BY MACHINE—message delivered to a machine.

LEARNED MACHINE—PhoneTree encountered an unusual machine and will try back later.

9 WAS NOT DIALED—person didn't confirm with 9 (option) and PhoneTree will try again later.

NEVER DIALED 9!—person didn't confirm with 9 after multiple attempts.

CALLED 15 TIMES—message not delivered after max number of attempts.

FAILED TO CONNECT—no signal detected after dialing, check phone #.

NOT DELIVERED—PhoneTree cannot deliver message, check phone #.

OGM TOO LONG—Outgoing message of their answering machine is too long, check phone #.

Note: All call statuses are cleared when you press the [CALL] key followed by any key except the <R>ESUME or [STOP] keys.

Answering Machines

ANS BY MACHINE—PhoneTree will determine if a machine has answered the phone, deliver its message after the beep, and declare the call complete. If the "CONFIRM WITH 9" option has been selected, both the introduction and message are delivered. If the letter "A" is included in a phone number such as 555-1212A, PhoneTree will not leave your message on a machine at this number—PhoneTree will hang up, treat the call as a "No Answer", call back later, and attempt to reach a live person.

Some answering machines do not provide a standard beep tone. The first time PhoneTree calls one of these machines it "learns" how the machine works, but does not deliver your message. The call is treated as a "LEARNED MACHINE" and the number will be called back later. Should you ever encounter a "stubborn machine" that PhoneTree can't learn, you can attempt to "Teach It." Use [FIND] <W>HO to find the person with the machine. Press [CALL] and <T>EACH. When the machine answers, wait and press [PLAY] at the time when PhoneTree should leave the message. From then on, every time PhoneTree calls this "Taught" machine, stored information is used to assure that the message is left at the proper time and no second call is required.

Reference -> Menus

Setup of the Calling Times Menu

To change the time on PhoneTree press [MENU] <T>IME.

Enter the current time followed by <P>M or <A>M and press [ENTER].

Move the cursor under today's date and press [ENTER].

Enter the "DON'T CALL BEFORE" time and press [ENTER].

Enter the "DON'T CALL AFTER" time and press [ENTER].

Enable the "CALL ON" day(s) by moving the cursor to the desired day(s) and press the [SPACE] key, then press [STOP]. **Note:** If a "letter" is on or being displayed, calls can be made on that day. If a "star" is on or being displayed, then a call can not be made on that day. Use the [SPACE] key to toggle the day on (letter) or off (star). Calling on Tuesday only would be displayed as **T**** and calling on Monday, Thursday and Friday would be displayed as *M**TF*.

The Setup Menu

Press [MENU], then <S>etup then the [DOWN] arrow key. (Use the [UP], [DOWN] or [ENTER] keys to select a menu option.)

Dialing Mode? Select <P>ulse (rotary) or <T>one dialing then press [ENTER]. Default: Tone

Message Length? Select <S>hort (54 seconds) or <L>ong (80 seconds). Message quality is better with <S>hort and is highly recommended. Press [ENTER]. Default: Short

Confirm with 9? Choose <Y>es to enable "Confirm with 9" so each member must dial a 9 to hear your message. Select <Y>es and press [ENTER] to set the number of tries to get 9 confirmation. **Note:** an introductory message must be recorded and this message must state that the listener must press 9 in order to hear to the main message. PhoneTree will prompt you to record an introductory message if "Confirm with 9" is enabled. Default: No

Listen to Calls? Choose <Y>es to hear calls as they are made. Note: to turn speaker on and off while calls are being made, press the <S> key while calls are being made. Default: Yes

Repeat Message? Choose <Y>es to have your message automatically repeat before hanging up. This extends the time required to call. **Note:** It is preferable to use "Star to Repeat." Select either "Star to Repeat" or "Repeat Messages." Default: No

Quick Call Mode? Choose <Y>es to speed up message delivery to people at home. During the first round of calling, PhoneTree only rings 3 times

Reference -> Menus, continued

before going to the next number. Answering machines usually pick up after the 4th ring. During subsequent calling, PhoneTree reverts to its normal ring count. Default: No

The Dial Menu (to use PhoneTree as an Auto-Dialer)

Press [LIST] [FIND] <W>HO, then type the first letters of a name and press [ENTER]. Press [MENU] <D>IAL. Pick up your phone only after the person answers. If not answered, PhoneTree redials once per minute. **Note:** to deliver a message to a person or to an answering machine, press [FIND] <W>HO, then type in the letters of a person's name and press [ENTER]. Press [CALL] <P>ERSON. PhoneTree will deliver your message to that person or to that answering machine.

The Version Menu

Press [MENU] <V> to see the Firmware version of your PhoneTree.

The Advanced Menu

Press [MENU] and press <A>DVANCED.

Sorted List? Choose <Y>es to sort your list alphabetically. Default: Yes

Count Replies? Choose <Y>es to have PhoneTree stop calling after the desired number of "yes" 9 replies. Select <Y>es and press [ENTER] to see "How many replies? Input the number of "yes" (9) replies you want from 1 to 999. This mode only recognizes "9" when dialed on touch-tone phones. This feature is especially good for doing "yes and no" surveys, and for seeking volunteers, because PhoneTree will stop calling after the number of desired '9' replies are received. Default: No

Hang-up Detect? Choose <Y>es unless you experience problems with PhoneTree hanging up before your message is done. Default: Yes

Dial Prefix 1?/Dial Prefix 2? Choose <Y>es if your phone system requires an access code to get an outside line. Select <Y>es and press [ENTER] to see ENTER PREFIX 1: (or) 2: You may input up to 16 digits for each prefix. Prefixes are dialed before every phone number, and Prefix #1 is always dialed before Prefix #2. Default: No

Dial Suffix 1?/Dial Suffix 2? Choose <Y>es if your phone system requires a code to complete calls. Select <Y>es and press [ENTER] to see ENTER SUFFIX 1: (or) 2: Input up to 16 digits for each suffix. Suffixes are dialed after every phone number, and Suffix #1 is always dialed before Suffix #2. Default: No

Note: If "Count Replies?", "Dial Prefix 1 or 2?" or "Dial Suffix 1 or 2?" are enabled, pressing the [CALL] key will cause a tone to sound and a message in the display stating: "Advanced Menu Options Enabled, <O>K to Call?" Press <O>K to allow calling.

Reference -> Menus, continued

Enter Pager # Enter the number you wish to have PhoneTree leave when it contacts a pager. **Note:** to leave your call back number on a pager, put a <C> in the phone number in your list, ie; 555-1212C. When a pager service is reached, PhoneTree leaves this call back number. Default: Blank

Remote Access? Enter <Y>es to enable operation from a touch tone phone. Select <Y>ES and press [ENTER] to see REMOTE PASSWORD. Input up to a 16 digit numerical password then press [ENTER] to see #of Rings before Remote answers? Input a number between 1 and 9. Default: No

Star to Repeat? Choose <Y>es to allow listeners to repeat your message by pressing the *(star) key while your message is playing. Choose <Y>es unless you experience problems repeating the message even when listeners do not dial *(star). Default: Yes

Serial Com Delay Leave setting at "0" unless change is recommended by PhoneTree Tech Support. Default: 0

How many NO ANSWERS allowed? This is the number of attempts PhoneTree will try to connect to a phone number if a person or answering machine does not pick up. Default: 15

How many RINGS are allowed? This is the actual number of rings each time PhoneTree connects to a number. Remember that most answering machines pick up after the 4th ring, Default: 7.

Max Ans Machine OGM (sec)? This is the number of seconds (up to 39) allowed for the outgoing message of their answering machine before PhoneTree hangs up. Default: 25

TT Reply Sensing Change this option from <N>ORMAL to <L>OW only if you have problems with PhoneTree detecting false touch-tone replies. Default: Normal

0 for PhoneMate? Choosing <Y>ES here allows your members to leave you a voice mail message by pressing "0" (if you have purchased the optional PhoneMate accessory). Default: No

Dial Tone Check? When enabled, PhoneTree will check for a proper dial tone on the line before calling. Default: Yes

Special Dialing

Dialing Delay: If your phone system requires a dialing delay, put a <D> in the prefix (see **Dial Prefix**, above). The number 9D will dial 9, pause 2 seconds before dialing additional digits.

Answering Machines: If you do not want PhoneTree to talk to a answering machine, put an <A> anywhere in the phone number or prefix. ie; A555-1212. If a machine answers, PhoneTree will hang up and call back later.

Reference -> Frequently Used Commands

Naming Your List

Press [LIST] to view or change your list name (type in).

View Names, Phone # and Group Information

Press [LIST], and use the up or down arrow keys to view each member, phone number, group and status information.

Adding a Member

Press [ADD], type in name, Press [ENTER] and type in phone number, press [ENTER] and type in group number. When finished, press [ADD] to add the next member or press [STOP] if you are finished.

Erase a Member

Press [FIND] and <W>HO and type in the first few letters of the member's name. Press [ENTER], and when you see that member's information, press [DEL] then press <Y> to permanently remove this member from the list.

Erase Your List

Press [LIST], Press [DEL], Press <Y>ES, and then confirm by pressing <O>K.

Deleting a Group

Press [GROUP], Press the Group [NUMBER], then Press [DEL] to delete the group and all members of that group.

Naming Groups

Press [GROUP], Press the Group [NUMBER], Press [ENTER], then type in the name of your group.

Adding a Person to a Group

Press [LIST], Press [FIND], Press <W>HO and type in the name. Press [ENTER] three (3) times and the member's group information should be displayed. Press the number of the group to be selected. If a [*] is displayed, he or she is not a member of that group.

Remove a Person from a Group

Press [GROUP], select the group number, then use the up and down arrow keys to select the person you wish to erase, then press [DEL], then press <Y>es.

Call Your List

Press [CALL], press [LIST].

Call a Group

Press [CALL], press [GROUP], then press the number(s) of the group(s) you wish to call. Press [ENTER].

Reference -> Frequently Used Commands, continued

Call One Person

Press [FIND], press <W>ho, type the first few letters of the person's name and press [ENTER], press [CALL], press <P>erson.

Stop Calling

Press [STOP] while calling. This pauses the calling session and allows you to either cancel the job or to pick up where you left off.

Resume Calling

Press [CALL] <R>esume. If all calls were not completed PhoneTree will resume where it left off after these keys are pressed.

Panic Stop

Press [STOP], [STOP], [STOP] quickly while calling. Doing this completely cancels the calling session. Then answer <Y>es to stop calling.

Viewing a List

Press [LIST] and press the down and up arrow keys.

Viewing a Group

Press [GROUP], select a group number, then press the down and up arrow keys.

Recording a Message

Press [REC], then speak your message after the beep. Press [STOP] after completing your recording. The recorded message will automatically play after pressing [STOP]. To hear a recorded message at other times press [PLAY]. **Note:** Recording a new message will erase the previous message.

Stats

Press the [STATS] key plus:

<S>tats key for calls placed and done.

<V>iew and the up and down arrow keys to see each person's call status.

<F>ailed to see the calls for which dialing errors were detected.

R<E>ply and up and down arrow keys to see each person's reply.

<Y>es and the up and down arrow keys to see who has replied with a YES (pressed "9") when asked to reply.

Reference -> Hints for Message Recording

PhoneTree's microphone is located under the left front lip of the unit. There are several things you can do to optimize recording quality. These include:

1. Speak slowly, clearly, and at a normal volume. Do not shout into the microphone.
2. Record at an arm's distance from PhoneTree's microphone.
3. Place PhoneTree on a hard flat surface away from any devices that could create noise/sound/vibrations or other background interference.
4. Do not place PhoneTree on top of other equipment such as a computer.
5. Use the SHORT MESSAGE option when recording messages, if possible.
6. If possible, have different people record messages to determine which person's voice is best.

If you use the "**Confirm with 9**" option, you must record both an introduction and a message. Press [REC] <I>ntro to record an introduction. Press [STOP] when done. The introduction should request the answering party to dial 9 to listen to the message. For example: "Hello, this is Bill from the Boy Scouts. Please dial 9 **after the beep** to hear a very important message about this weekend's camping trip." An introduction does not have to be included in every calling session. To deselect the "Confirm with 9" option, go to the Setup Menu (page 21A).

The **Call Reply Mode** automatically stores the listener's touch-tone response to a question. There are no menu settings required to use this mode, just ask your question. PhoneTree will remember the last touch-tone digit dialed by that person. Remember that after asking your question, allow at least 5 seconds before pressing [STOP] so listeners will have time to reply. A typical reply question is: "If you will be attending this Saturday's breakfast, please press 1 now..." or "If you are coming to tonight's meeting, press "Y" now, or press "N" if you cannot attend..."

Star (*) To Repeat Use this option to give listeners an opportunity to listen to your message a second time. Your message must contain something similar to: "If you would like to hear this message again, please press the Star key now..." If your message does not inform the listener of the STAR (*) to Repeat option, then the listener will not know to press the Star (*) key. See page 22A for details.

Reference -> Remote Access

To use remote access (the ability to access PhoneTree through any touch-tone telephone), you must enable it under the Advanced Menu (page 21B).

Calling into PhoneTree

Call the number where PhoneTree is located. PhoneTree will answer after the set number of rings and tell you its status using the following:

Chime: PhoneTree is idle and ready for use.

3 Chimes: PhoneTree is in use and waiting to make the next call.

3 Beeps: Power was interrupted. Any message has been lost and PhoneTree does not know the current time.

Note: If you do not wish to continue, hang up. PhoneTree will disconnect after 20 seconds and resume any calling session that was in progress.

To enter your password, dial *(star) followed by your password. Once the password is entered, you have control over PhoneTree and any calling session in progress is halted. **Note:** All remote commands must start by pressing the *(star) key, followed by command digits and sometimes the #(pound) key. If you make a mistake, just start over by pressing the *(star) key.

Remote Commands use the *letters* on a touch tone phone.

Commands	Record Message * R M (speak) #
	Record Intro * R I (speak) #
	Listen to Message * L M #
	Listen to Intro * L I #
	Call List * C L
	Call Groups 2 & 7 * C G 2 7 #
	Call Resume * C R
	Call for 2 Hours * C F 2
	Hang Up * H U

If you attempt to begin or resume a calling session and hear a **long beep**, you are attempting to make calls without a message recorded!

If you hear **three beeps:** power was interrupted. You must use * C F before using any other calling commands.

After a calling command (*C_), PhoneTree hangs up and begins calling in two minutes if the current time is between the "Don't Call Before" and the "Don't Call After" times or you used the * C F command. If necessary, you can call back and make changes during the 2-minute delay.

Sample Messages

Meeting Announcement

"Hi, this is Mary calling to let our members know about an important meeting this Wednesday. We will be discussing several issues and it is important for everyone to attend. The meeting will be at 7:00 pm in room 101. Again, that's this Wednesday at 7:00 pm in room 101. See you there!"

Voice Newsletter

"Hi, Bob Brown, your personal agent at Gibraltar Securities, with important news about this week's market activity. Monday's Treasury action had the effect of lowering interest rates. Combined with the recent upgrading of select bonds, this presents an excellent opportunity for relatively safe, high yields. I feel this can be a useful addition to your portfolio. Please call my home or office if you would like to discuss this opportunity."

Appointment Reminder *(using "*" to repeat message)*

"This is Hair Clips calling to remind you about your appointment tomorrow. If you are unable to make your appointment or need further information, please call our office at 555-1597 between 8:00 am and 5:00 pm. If you missed any of this message, press the star key on your phone now, and the message will repeat. ... (pause)... Thank you and have a nice day."

Emergency Closing *(using Confirm with 9)*

Introduction: "Hello, this is Tom Davis with BGE Industries. Please dial 9 after the beep to hear important plant news."

Message: "I'm calling to let you know that B & C shifts should not report to work today, due to the severe storm. Be careful if you have to drive out there. All shifts should report to work as usual tomorrow. Thank you!"

Event Attendance *(taking a reply)*

"This is Betty calling on behalf of the event committee. We are ordering food for our annual picnic. If you know how many family members will be attending, press that number now... (pause)... If you don't know right now, call me at 555-1834 before Friday. That's 555-1834. See you there!"

Member Survey *(taking a reply)*

"Hi, it's Steve Watson calling. It's time to repaint the gym, and I'm taking a survey before buying paint. If you prefer the new light yellow, press 'Y' now. If you prefer blue, press 'B.' We will be painting Saturday at 9:00 AM, so come out if you can help. (pause) Thanks a lot!"

Calling for Volunteers *(Count Replies Mode, calls stop after 3 members press 'Y.')*

"Hi, Steve Watson again. The gym looks great, thanks a lot to all who helped. I'm calling to get three volunteers to help set up this Friday's game. If you can help this Friday at 5:30 PM, please press 'Y' now. (pause) Thanks!"

This troubleshooting guide will help you solve the most common PhoneTree operational problems. Most problems can be resolved quickly and easily without the need to spend time on the phone.

If you do not find the answer here, please check our website at www.phonetree.com, or call PCS Technical Support Mon.–Fri., 8:30-5:00 Eastern Time at 336-722-0087. To expedite resolution of your problem, please be near your PhoneTree and your computer, if applicable. If possible, use a different telephone line than PhoneTree.

Sound Quality & Preferences

Problem: Voice quality is poor.

Source: PhoneTree may be set for “long” messages. Remember, that over the phone your message will sound better than it does through PhoneTree’s speaker.

Solution: When recording, use an “arms-length” distance between PhoneTree and the person recording the message. Also, record your message with PhoneTree on a hard flat surface, away from noise machines and devices when recording. Use short length messages for the best message quality [pg. 21A]. Also, remember that the PhoneTree microphone is in the lower left hand corner of the unit. Do not shout while recording.

Problem: The speaker is on during calling [and I want it off!]

Source: “Speaker On” was enabled during setup.

Solution: Press the <S> key on the keyboard to toggle the speaker off (or on) during calling. You can also change the setup by pressing [MENU], <S>etup and turning off the “Listen to Calls?” option.

Question: PhoneTree plays a “chime” before each call. Can this be turned off?

Source: No. The chime alerts members that PhoneTree is calling.

Solution: No action required.

Setup and Installation

Question: What kind of telephone line can I connect my PhoneTree to and can I connect other devices to the same line?

Source: Installing PhoneTree

Solution: PhoneTree must be connected to an analog phone line. PhoneTree has two (2) telephone jacks—one for connecting to a telephone outlet and the other for connecting an extension telephone, fax machine or modem. The sharing of a phone line with other devices should be approached with caution since PhoneTree calls be interrupted by the other device.

Question: The display on PhoneTree is blank or black, what’s wrong?

Source: A blank or black display on PhoneTree could be the result of no electricity, a bad electrical wall outlet, a bad or damaged electrical adapter, frayed wires, or effects of an electrical storm.

Solution: Safety and caution should always be exercised when checking electrical problems. One way to test for possible electrical problems is to disconnect PhoneTree and connect it to another electrical outlet. Also, the black power adapter can be checked by replacing it with a similar adapter (9VDC, 300-500MA, Center POSITIVE) or with an electrical volt meter.

Question: Can I do a “Test Call” to make sure my settings are correct?

Solution: If you have keyed in your names and telephone numbers, select one name to test by pressing [FIND], then <W>ho, type in the person’s name and press [ENTER], press the [CALL] key, then press <P>erson. Additionally, a “Test Call” can be made by assigning as small number of names to a single “Test” group, then press [CALL], [GROUP], then press the Test Group number and press [ENTER].

Question: I get confused when keying in settings, can you help?

Solution: Selecting a setting under an option may require you to push:

WORD key such as [LIST]

LETTER key such as <A>

NUMBER key such as [5]

ARROW key (up, down, left and, right) to see more options

or a combination of the above keys

If you are just learning to use PhoneTree, take a few minutes to review Page 18B (Important Keys) to get a feel for PhoneTree settings and locations.

Problem: PhoneTree does not get a dial tone after I connect my office phone line.

Source: Placing PhoneTree in an office environment with other telephones, computers, answering machines, faxes, and limited telephone lines may present problems for PhoneTree.

Solution: If PhoneTree doesn’t get a dial tone after your initial setup, there are several things to check to insure that there is a dial tone available:

- Is the telephone cable connecting PhoneTree to the wall outlet bad? Substitute a known working cable.
- Are the telephone cable connectors on both ends of the cable in good shape and not loose after plugging into the wall outlet and the back of PhoneTree? Make sure that the wall outlet is secured to the wall properly and not damaged.

- Does PhoneTree have to dial a 9 to get an outside line? If so, you must program a prefix in the PhoneTree Setups.
- Do your office phones have line buttons you need to push to get an outside line? PhoneTree may need to be connected via an ANALOG phone line adapter (contact your phone system vendor).
- Has your phone company installed a special service (phone company voice mail, or other services) on your line which produces a stutter dial tone? Contact the phone company to discontinue the special service, or disable PhoneTree's DIAL TONE CHECK option (page 21B).
- Is PhoneTree's phone cable connected to a fax or answering machine? Two devices connected on the same line will not work at the same time.

If you believe your phone line is fine, take PhoneTree home and try a test call to determine if PhoneTree is damaged. PhoneTree must be connected to an analog phone line, not a digital line.

Problem: My fax or answering machine answers when I use Remote Access.

Source: Incoming calls will be answered by the fax machine, answering machine, and/or computer modem if these devices are set to receive calls.

Solution: Ideally, another device should not share a phone line with PhoneTree while PhoneTree is in use. You must select ONE device to answer FIRST.

Timing and Call Sessions

Problem: PhoneTree doesn't keep time—every morning I have to reset the time.

Source: The power was turned off (possibly a light switch controls the electrical outlets) or there was a power failure.

Solution: Insure a continuous source power to the PhoneTree.

Problem: PhoneTree is not making connections, even though I hear it dialing.

Source: Your local phone company may have installed a special service (phone co. voice mail or other) which produces a "Stutter Dial Tone."

Solution: Connect a standard telephone and determine if you have a stutter dial tone. Contact the phone company to have them correct the problem or to discontinue the service. Disabling DIAL TONE CHECK in the Advanced Menu may resolve this problem.

Problem: PhoneTree called someone more than once

Source: The same phone number may be included for different names, a name may be entered twice, or the call job was restarted by pressing [CALL] [LIST].

Solution: Remove any entries with the same phone number, and use only [CALL] <R>ESUME to resume a call session already in progress.

Problem: PhoneTree starts delivering its messages before the phone is picked up.

Source: A "broken ring" can occur as a result of a call being transferred.

Solution: PhoneTree and PhoneTree Plus have limited ability to detect and handle this condition. Consider upgrading to a USB model.

Problem: PhoneTree called in the middle of the night.

Source: The time or calling window may be set incorrectly.

Solution: Reset the time and verify "DON'T CALL BEFORE," "DON'T CALL AFTER" times (page 21A). Pay attention to [A]M and [P]M.

Question: Can I resume calling after interrupting a call session?

Solution: Yes. To call the remainder of the list press the [CALL] button, then press <R>esume. If power was interrupted, you will need to re-record your message.

Problem: I want PhoneTree to call, but the display says "Waiting to Call."

Solution: Is it time for PhoneTree to call? Are the current time and day set correctly? Are the "Don't Call Before" and "Don't Call After" times and the "Calling Days" set correctly? If these settings are correctly entered, there may be nothing wrong. See next problem also.

Problem: PhoneTree started calling but now says "Waiting to Call."

Source: This is normal. PhoneTree completed all the calls it could, and will call those who were not home after waiting for a brief period OR PhoneTree may have reached the end of a calling window and is waiting for the next window.

Solution: Days with a "star" (*) are not active (see page 21A). Check the timer shown in the display. It should be counting down to the next calling session. If the timer shows less than 30 minutes, it will resume calling at that time. If the timer shows more than 30 minutes, it is waiting for the next window (day) and will resume calling then.

Question: Why does PhoneTree stop calling before the entire group is called?

Source: The source of this problem could be one of several settings. Has enough time been allowed to call the entire group—either in hours or days? Adding settings for "message repeating," "star to repeat" and high "number of no answers" will extend the calling time required.

Solution: Before calling, consider the number of calls to be made, the impact of your settings and plan your calls by giving PhoneTree sufficient time to make its calls. Plan on completing about 50-60 calls per hour.

Problem: PhoneTree starts working, but no name or number is in the display.

Source: A "blank" record in PhoneTree appears at the top of your list.

Solution: Check the list by pressing [LIST] and scrolling down the list of names. Press [DEL] to delete any blank entries.

Problem: I have PhoneTree set to ring each number 6 times, but when my calls take place PhoneTree only rings 3 times.

Source: Quick Call Mode is on.

Solution: Check your settings for the “Quick Call Mode” under Advanced Options. “Quick Call” mode is designed to speed message delivery. In the “Quick Call” mode, Phone Tree will talk to an answering machine only after first calling all numbers once, then answering machines will be called back. **Note:** Quick Call Mode allows PhoneTree to ring 3 times in order to avoid answering machines being picked up. This is intended for emergency calling only, for example if you need volunteers to assist with an emergency.

Question: How do I tell PhoneTree what days to call on?

Source: Setting calling parameters

Solution: Page 21A provides a summary and detail commands for selecting what day PhoneTree will call. Remember to use the “space” key to “toggle on and off the days” for Phone Tree to call.

Problem: My call window changed.

Source: Someone may have used PhoneTree’s remote access and used the “*CF1” command to reset the call window (pg. 24A).

Solution: Reset the Time, “Don’t call before,” and “Don’t call after” settings (pg. 21A).

Messaging/Capability

Problem: What calling rules does PhoneTree follow?

Solution: The general calling rules are:

1. PhoneTree calls each person in the group(s) you select in order.
2. After calling the last person, PhoneTree goes back and retries all calls that were not completed.
3. CALL ANSWERED—PhoneTree delivers the message, declares the call completed and does not call back.
4. LINE BUSY—PhoneTree will recall every few minutes or as soon as all other incomplete calls are attempted (whichever is longer).
5. NO ANSWER—PhoneTree will re-call a few times every hour or as soon as all other incomplete calls are attempted (whichever is longer).
6. CALL FAILED—PhoneTree will NOT retry a number which did not connect(e.g., incomplete phone number entered). When all other calls are completed, a special warning will be displayed and that person’s status will show “FAIL TO CONNECT.”

Problem: PhoneTree waits to play my message after the phone is answered.

Source: This could be due to silence recorded at the beginning of your message.

Solution: Be sure to start speaking immediately after the “beep” when you press the record button.

Question: I need to call a member’s pager, can PhoneTree handle that?

Source: Yes. PhoneTree can leave your number on their pager. Simply put a “C” in the person’s telephone number.

Solution: Using the advanced menu, enter the number you wish to leave on pagers (see page 22A).

Question: I need to dial “9” to get an outside line, can I do it without changing all my phone numbers?

Source: Yes. PhoneTree’s Prefix will dial a PREFIX before each number.

Solution: Using the Advanced menu put “9D” in for PREFIX #1. PhoneTree will dial 9 and wait 2 seconds before it dials each number (see page 21B).

Problem: My message is being repeated over and over.

Solution: Two situations combine to cause a message to repeat itself: 1) the STAR to REPEAT optional setting is enabled and at the same time 2) the voice of the person who recorded the message has generated tones that trigger an automatic repeat of a message. The solution to this situation is to re-record the message, have another person record the message or disable the “Star to Repeat” setting.

Problem: PhoneTree says “Learned Machine” but did not leave a message.

Source: The answering machine gave a message that took too long to decipher. PhoneTree will call back and deliver the message at the right time.

Solution: No action is necessary. PhoneTree will deliver your message to this machine the next time around (see below).

Question: What is meant by “PhoneTree Learning How a Machine Works?”

Source: Calling new numbers and new answering machines

Solution: When PhoneTree connects to an answering machine that does not provide a standard beep tone, PhoneTree learns how the answering machine works, but does not deliver your message the first time it calls—it treats it like a “No Answer” and will call the number again.

Question: What is “OGM”?

Source: Status report of calls reports Out Going Message is too long.

Solution: When PhoneTree dials, connects and detects a answering machine, PhoneTree will listen up to the amount of time specified. The

Troubleshooting, continued

default setting for “MAX ANS MACHINE OGM (sec)” is 25 seconds and can be increased to 39 seconds to provide more time for the called answering machine to complete its message. Only do this if you experience problems delivering your message.

Question: What is meant by “HOW MANY NO ANSWERS ALLOWED”?

Source: Max No Answers

Solution: The setting for “How Many No Answers Allowed” enables a user to call a phone number from 1 to 15 times if the number being called has not answered.

Question: I have a lot of details in my message, how can I be sure everyone has time to write them all down?

Source: Remind them *in your message* that they can repeat the message by pressing the star (*) key on their phone.

Solution: Using Advanced Menu (page 21B) enable ‘Star to Repeat.’ Leave some silence at the end of your message to allow them time to press star.

Question: How can I be sure my message is delivered to the right person?

Source: PhoneTree allows an intro message to confirm receipt.

Solution: Record your intro requesting the called party to dial “9” to hear the message (page 21A).

Problem: PhoneTree’s display says “No Dial Tone” (See next item also).

Source: PhoneTree may not be connected to a telephone outlet OR a phone may be off the hook. You may need to dial 9 or another code.

Solution: Check PhoneTree’s phone line connection, verify all phones are hung up. If you are using a phone system, check with your installer. PhoneTree requires an RJ11 jack. Also, another device may be using that phone line, such as a modem, fax, answering machine or even an off-hook telephone (See next question also).

Problem: When I have a voice mail message waiting, PhoneTree is unable to call.

Source: If you have voice mail from your local phone company, a stutter dial tone (alerting you that there are messages) will precede the normal dial tone.

Solution: Disable “Dial Tone Check” by pressing [MENU], <A>dvanced, using the down arrow key until you see “DIAL TONE CHECK?”, press <N>o.

Question: Can I use PhoneTree to take a survey?

Source: Call Reply feature lets you ask a question that can be answered with a number, such as “If you are coming to the event, press 6 now...”

Solution: PhoneTree automatically records a touch tone response. Be sure to leave some silence after your message to allow for the entry. You can check each person’s reply after calling by pressing [STATS], then r<E>ply.

Troubleshooting, continued

Problem: I need to use PhoneTree but I can’t get to the office.

Source: Remote Access allows operation from any touch tone phone.

Solution: Be sure the list or group you want to call is in PhoneTree, then call in to record your message and start calls (see Remote Access on page 24A).

Question: I know PhoneTree can hold 990 people and 10 groups, but how many people can be in a group?

Solution: Each of the 990 members can be in one, some, none or all of the groups—so each group can have none, one or up to 990 members.

Question: How do I stop the calling session while calls are being made?

Solution: Push [STOP] and follow the instructions on the display. To cancel the call and HANG UP on the person PhoneTree is speaking to, quickly press [STOP] 3 times. (To resume the calling session, press [CALL] and then press <R> for Resume.)

Question: When do I use the “STOP” key on the PhoneTree?

Solution: The [STOP] key is one of the most, if not the most important key on your PhoneTree. Turn to page 18B to read more about when to use the [STOP] key.

Question: Can I set the number of times PhoneTree tries each number?

Source: Yes. You can adjust the number of attempts from 1 to 15 times.

Solution: Using Advanced Menu (see page 21B), set “How Many NO ANSWERS ALLOWED.” Remember that if a line is busy or not answered, PhoneTree will not retry after this number of attempts.

Question: Where can I find a quick reference of PhoneTree commands?

Solution: On pages 18-19 you can find the commands necessary to operate PhoneTree. Just remember to press [STOP] after commands are completed, or if you are unsure of what to choose or press.

Other Questions

Question: Can I upgrade PhoneTree and use it with my computer?

Solution: Call PhoneTree sales at 1-800-951-8733, check the upgrades section of the PhoneTree website (www.phonetree.com) or email PhoneTree with your questions about upgrading.

Question: I need to get My PhoneTree repaired—what will it cost?

Solution: If PhoneTree is not operating at all or not operating properly, it is suggested that you contact PhoneTree Technical Support for a recommendation. If PhoneTree has to be returned for repairs, upon receipt there will be an automatic bench test to determine the nature of the problem. If PhoneTree is not under warranty, the cost of the bench test will be included

in the total cost of repairs. Until a bench test is performed on a damaged PhoneTree, repair costs are difficult to estimate. **You MUST call PCS for an RA number** prior to sending your unit for repairs at 336-722-0087.

Question: Can I upgrade my PhoneTree or my Plus to the latest version?

Solution: Depending on what version of PhoneTree you own, your PhoneTree may or may not be upgradable. To determine if your PhoneTree or PhoneTree Plus stand-alone unit is upgradable, call PhoneTree Tech Support at 336-722-0087 with the Version Number of your PhoneTree. To find the Version number of your PhoneTree press [MENU] then press <V> on your PhoneTree.

Question: Can I connect my PhoneTree Plus to my computer?

Solution: Yes. PhoneTree Plus includes the necessary cable and software to communicate with your PC. Call Technical Support (336-722-0087) for answers to questions related to connecting your PhoneTree to a computer. PhoneTree Standard cannot be connected to your PC.

Question: Can I get help after my initial 90 days of free support?

Solution: Often a new operator inherits a PhoneTree that has been in use for a number of years. This manual and Internet web site (www.phonetree.com) provide the best information and technical guidance. You are encouraged to explore the web site for information on updates, new products, and frequently asked questions. Customers calling PhoneTree Technical Support can either elect to purchase a Service Support Contract or pay for the technical service on a per incident basis after the initial 90-days expire.

Question: When do my 90 days of free technical support begin?

Source: Support period begins after your first call to PCS.

Solution: Free 90-day technical support begins on the first call for technical support and expires 90 days thereafter. All new owners are encouraged to inspect and test PhoneTree upon arrival to insure that it is operational and that no damage has occurred during shipment. Your warranty for parts and labor also begins upon purchase and expires 1 year thereafter.

Question: Should I use a surge suppressor to help prevent damage to PhoneTree?

Source: Phone and electrical lines

Solution: Yes! Acts of God like electrical storms are not covered under warranty. A surge suppressor will help protect PhoneTree (and other electronic equipment) from electrical damage. Remember that power surges can attack PhoneTree via electrical or telephone lines.

When using your telephone equipment, basic safety precautions should always be followed to reduce the risk of fire, electric shock and injury to persons. These precautions include:

1. Read and understand all instructions.
2. Follow all warnings and instructions marked on the product.
3. Unplug this product from the wall outlet before cleaning. Do not use liquid or aerosol cleaners. Use a damp cloth for cleaning.
4. Do not use this product near water, for example, near a bathtub, washbowl, kitchen sink or laundry tub, in a wet basement, or near a swimming pool.
5. Do not place this product on an unstable cart, stand or table. The product may fall, causing serious damage to the product.
6. Slots and openings in the cabinet and the back or bottom are provided for ventilation. To protect it from overheating, these openings must not be blocked or covered. The openings should never be blocked by placing the product on the bed, sofa, rug or other similar surface. This product should never be placed near or over a radiator or heat register. This product should not be placed in a built-in installation unless proper ventilation is provided.
7. This product should be operated only from the type of power source indicated on the marking label. If you are not sure of the type of power supply to your home, consult your dealer or local power company.
8. Do not allow anything to rest on the power cord. Do not locate this product where the cord will be abused by walking on it.
9. Do not overload wall outlets and extension cords as this can result in the risk of fire or electric shock.
10. Never push objects of any kind into this product through cabinet slots as they may touch dangerous voltage points or short out parts that could result in a risk of fire or electric shock.
11. To reduce the risk of electric shock, do not disassemble this product, but take it to a qualified serviceperson when some service or repair work is required.
12. Unplug this product from the wall outlet and refer servicing to qualified service personnel under the following conditions:
 - a) When the power supply cord or plug is damaged or frayed.
 - b) If liquid has been spilled into the product.

Safety Information, continued

- c) If the product has been exposed to rain or water.
 - d) If the product does not operate normally by following the operating instructions. Adjust only those controls that are covered by the operating instructions, because improper adjustment of other controls may result in damage and will often require extensive work by a qualified technician to restore the product to normal operation.
 - e) If the product has been dropped or the cabinet has been damaged.
 - f) If the product exhibits a distinct change in performance.
13. Avoid using a telephone (other than a cordless type) during an electrical storm. There may be a remote risk of electric shock from lightning.
14. Do not use the telephone to report a gas leak in the vicinity of the leak.

SAVE THESE INSTRUCTIONS

Warranty and Upgrade Information

Full One-Year Warranty

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

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

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

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

State Law Rights

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

Warranty and Upgrade Information, continued

Battery Replacement

Battery should be replaced only at authorized PCS service locations.

What We Ask You to Do

Call PCS at (336) 722-0087 for the location of the nearest PCS service center. You must prepay all shipping charges to the PCS service location. We recommend that you retain and use the original packaging materials in the event that you do need to ship your PCS product.

First, obtain a Return Authorization Number (RA#) from PCS, then carefully package your unit. PCS is not responsible for damage that occurs in shipping from the customer. An RA# is only valid up to 30 days after it has been issued. If this period has expired before return there must be a new number issued before a return will be allowed. Any shipments returned without a RA# will be returned to the customer.

Be sure to include your name, address, phone number, proof of purchase and a description of the problem. You must provide proof of the date of purchase. PCS pays return shipping. Repair or replacement is your exclusive remedy.

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

PCS makes no other warranties expressed or implied.

Maintenance

PhoneTree is designed to provide years of trouble-free service and requires no maintenance. To clean, use a soft, dry cloth. For stubborn dirt, first unplug the unit, then use a clean, damp cloth.

Upgrades

Your PhoneTree Standard can be upgraded to include the latest PhoneTree features or even to a PhoneTree Plus. Upgrades are available by contacting your local PhoneTree dealer, or PCS sales directly at (800) 951-8733.

To order from PCS, please give the serial number and software version of your PhoneTree (Press [MENU] [VERSION] to find out the latest version of your PhoneTree software).

Note: PhoneTree contains no user serviceable parts.