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# Perfect Voice Strategy BSTU Installation Reference Guide

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## Hardware Installation

- |   |                    |
|---|--------------------|
| 1. <b>Unpack and Inspect the System</b>                           | <i>See page 6</i>  |
| 2. <b>Install BSIS for SMDI on CIX/CTX (If necessary)</b>         | <i>See page 6</i>  |
| 3. <b>Program Telephone System</b>                                | <i>See page 6</i>  |
| 4. <b>Shut Down Telephone System</b>                              | <i>See page 11</i> |
| 5. <b>Install PV Strategy BSTU Card</b>                           | <i>See page 12</i> |
| 6. <b>Restart System &amp; Verify PV Strategy BSTU is Working</b> | <i>See page 12</i> |
| 7. <b>Configure the System</b>                                    | <i>See page 13</i> |



## A. Set the Date and Time

1. **Press intercom & call Perfect Voice Strategy BSTU.**
2. **Log in to User ID 900 (administrator box).**
3. **Dial 2 to set the current Time.**
4. **Dial 3 to set the current Date.**

*See page 14*



## B. Select the Telephone System

1. **Press intercom & call the Perfect Voice Strategy BSTU system.**
2. **Dial 913.**
3. **Using Table A, select the telephone system option.**
4. **Enter the appropriate Confirmation Code**

**NOTE: Telephone system type may be changed at anytime without affecting the User database.**

*See page 15, Table A*

### C. Select the Dialplan

1. Press intercom and call the Perfect Voice Strategy BSTU system.
2. Dial 912
3. Using Table B, select the desired dialplan option.
4. Enter the appropriate Confirmation Code.

**NOTE:** The dialplan may not be re-configured without performing a new installation.

*See page 16, Table B*



### D. Record System Greetings and Whattodos

1. Press intercom and call Perfect Voice Strategy BSTU.
2. Log in to User ID 980.
3. Press 5 to record current personal greeting(s).
4. Record greeting(s).

*See page 17*



### E. Set the Business Hours

1. Press Intercom & call Perfect Voice Strategy BSTU.
2. Enter 910.
3. Enter 2 for Schedule.
4. Enter the weekday number, (using 1 for Monday, 2 for Tuesday, ... or 8 for Weekdays).
5. Enter 1 to change the open time, or 2 to change the close time.
6. Enter the hour to open/close (0 to 23).
7. Enter the minute to open/close (0-59).
8. Press 1 to accept.
9. Press 1 to make changes effective.

*See page 21*



# Introduction

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## What is Perfect Voice Strategy BSTU?

Perfect Voice Strategy BSTU is an integrated voice messaging and call routing system designed to work with Toshiba CIX/CTX and DK telephone systems. Perfect Voice Strategy BSTU can perform a number of tasks for callers and Users, which increase their productivity.

Perfect Voice Strategy BSTU is packaged entirely on a printed circuit board that resides in the host KSU. The architecture of the system permits Perfect Voice Strategy BSTU to be connected directly to the CIX/CTX/ DK system data bus. This enables Perfect Voice Strategy BSTU connectivity without the traditional analog interfaces necessary for other voice processing systems.

System installation and initial configuration involves plugging in Perfect Voice Strategy BSTU to an available card slot in the CIX/CTX or DK system.

## Configurations

Perfect Voice Strategy BSTU is available as a flash-based system with 70, 140, and 560 storage hours.

## Users

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### Normal Users

Normal Users are those individuals who have a physical extension number on the telephone system that directly corresponds to their User ID, or mailbox, on the Perfect Voice Strategy BSTU system. If the called extension number is busy or does not answer, the caller is prompted to leave a message, enter another extension number or press 0 to reach the operator. The Normal User and Outside Mailbox User IDs may be two, three, or four digit numbers.

### Outside Mailbox Users

Outside Mailbox Users are those individuals who do not have a physical extension number on the telephone system but who do have a mailbox on the Perfect Voice Strategy BSTU system. When a caller enters an Outside User ID, Perfect Voice Strategy BSTU immediately plays the personal greeting for the mailbox and allows the caller to leave a message or dial another extension. The Normal User and Outside Mailbox User IDs may be two, three, or four digit numbers.

### Audiotext Mailbox

An Audiotext Mailbox is not associated with a specific telephone extension and does not take messages. Instead, it plays a pre-recorded greeting that provides information to callers. The information could be anything the company would like callers to have but does not necessarily need a person to say. Audiotext boxes are useful in playing information to callers such as the company address, fax number, business hours and general information.

### Auto-Detect Users

Two Auto-Detect Users are pre-defined (990=fax extension, 991=TDD extension). Use the SCREENS interface to specify the extension(s).

### Single Digit Users

Single Digit Users available are 1, 2, 3, 4, 5, and 6. These Users may also be defined as audiotext boxes and/or transfer boxes.

## System Codes

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### Pre-Defined System Codes

The pre-defined system codes are as follows:

- System Access code: 7
- Hang-up, or Endcall code: 998
- Direct to take a Message: 997
- Direct to Personal Greeting: 8
- Directory Assistance: 9

## What Perfect Voice Strategy BSTU Can Do For Callers

Perfect Voice Strategy BSTU can perform a number of tasks to enhance your company's telecommunications environment for callers (A caller is an individual calling your company from an outside line.)

- Answer an outside call and transfer the caller to an extension within your company.
- Answer an outside call and provide information by playing caller-selected pre-recorded messages.
- Allow a caller to leave a message for a User if the User is not available.
- After a caller records a message, he or she is presented with options to send the message, review the message, re-record the message, add to the message, or discard the message. The caller may also mark the message urgent or private. Marking the message urgent places that message before other messages in the destination User's mailbox. Marking the message private prevents the User from forwarding it to another User.
- Allow a caller to select another User, in the event that the originally selected User is not available.
- If a caller is calling from a rotary dial telephone or does not know how to use the system, Perfect Voice Strategy BSTU can transfer the caller to an operator.
- If a caller does not know the extension (User ID) of the person he or she wishes to reach, he or she may select the directory assistance option (9) and spell the name of the person, instead.
- Detect Fax tones and transfer to a fax machine.
- Detect TTY/TDD tones and transfer to a TTY machine.

## What Perfect Voice Strategy BSTU Can Do For Users

Perfect Voice Strategy BSTU offers a large number of features for Users. (Users are defined on the Perfect Voice Strategy BSTU system.)

- Allow a User to record a personal greeting that callers hear in the event that the User is not available to answer their call.
- Inform a User that a new message has been left by lighting the message lamp on the User's telephone.
- Allow a User to listen to messages left by callers or other Users.
- If a message was not marked private, allow a User to forward it to another User (or group of Users). The message can be forwarded with or without a prefix recording. The prefix might say something like, *"Joann, would you please take care the problem that Mark is describing in the following message."*
- Allow a User to set up a list of other Users to whom a message can be easily sent or forwarded.
- If a User does not know the User ID of another User, he or she can select the directory assistance option (9) and spell the name of the person, instead.

# Installation

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This section provides the steps to install the Perfect Voice Strategy BSTU hardware and configure the system.

## Installer Requirements

The installer plays a key role in the successful installation of the voice processing hardware and software. In addition to performing the actual work of installing the product, the installer acts as a liaison between the customer, telecommunications companies, and Teleco Technical Support. An installer is required to have skills and experience in at least the basics of telephony and computer technology, including the following:

- Perfect Voice Technical training certification.
- Training and experience in at least the general concepts of telecommunications.
- Certified on the Toshiba CIX/CTX and/or DK telephone systems.
- The ability to properly configure, install and remove circuit boards in a personal computer.

## Required Materials

- Anti-static wrist strap
- BSIS card and serial cable (if SMDI is required on CIX/CTX telephone system)

## Installation Overview

Step 1: Unpack and Inspect Perfect Voice Strategy BSTU, page 6

Step 2: Install BSIS Card if using SMDI Integration on Strata CIX/CTX, page 6

Step 3: Program Telephone System , page 6

Step 4: Shut Down Telephone System, page 11

Step 5: Install Perfect Voice Strategy BSTU, page 12

Step 6: Restart CIX/CTX/DK and Verify PV Strategy BSTU Is Functioning Properly, page 12

Step 7: Configuring the System, page 13

## Step 1: Unpack and Inspect Perfect Voice Strategy BSTU

Before unpacking, make certain that none of the shipping containers were damaged during shipment. Do not open any damaged shipping containers. Contact your shipping agent for appropriate claims.

### CAUTION

To ensure that the unit is not damaged during installation or maintenance, follow these precautions. Damage may not always be immediately evident (e.g., no physical damage on the outside of the unit) and system failure may result weeks or months later.

- **Handle Strategy BSTU with care.** Mechanical shock from dropping, shaking, excessive force when seating the board into the slot, rocking a connector on or other activities can severely damage the disk assembly or the disk's printed circuit board.
- **Wear an anti-static wrist strap.** It can also be re-used and left with the telephone system cabinet. An electrostatic charge from your body can damage the drive or circuitry permanently.
- **Hold Strategy BSTU by the edges. When inserting the card into the cabinet, only press on the card's edge. When removing the card from the cabinet, use the attached loop strap. Never touch the board's surface.** Pressure on the printed circuit board or contaminants from your hands (e.g., skin oil, food particles, hand lotion) can cause component failure.

### CAUTION - Battery Replacement

The PV Strategy BSTU battery can **ONLY** be replaced with a 3 volt Lithium coin battery, number **CR2032**. There is a risk of explosion if the incorrect battery is used. Dispose of used battery according to the battery manufacturer's instructions.

## Step 2: Install BSIS Card if using SMDI Integration on Strata CIX/CTX

### Note

A BSIS card must be installed in the Strata CIX/CTX if using SMDI Integration.

Install and program serial card BSIS in the Strata CIX/CTX. The serial cable will be used to connect the BSIS card to the PV Strategy BSTU.

## Step 3: Program Telephone System

The telephone system programming should be completed in two stages. In the first stage, the extensions for the Perfect Voice Strategy BSTU are programmed. The second stage of changes is not performed until the Perfect Voice Strategy BSTU has been fully programmed and all training is complete. This stage, often referred to as the cutover, is where you actually route and forward calls to the Perfect Voice Strategy BSTU.

### Programming Toshiba Strata CIX/CTX Telephone Systems

- Part I – Station Programming (Programs 200, 209, 218)
- Part II (a) – System Programming for IBS (Programs 579, 580)
- Part II (b) – System Programming for SMDI (Programs 579, 580, 804, 803)

## Part I – Station Programming (Programs 200, 209, 218)

### Program 200: Station Data Assignment

	Setting for Voice Mail Ports <sup>1</sup>	Setting for Station Ports
<b>02 Station Type</b>	<i>SLT</i>	<i>DKT</i>
<b>03 Circuit Type</b>	<i>Voice mail</i>	<i>Extension</i>
<b>15 Display DN</b>	<i>Enter Pilot DN for the VM Hunt Group<sup>2</sup></i>	<i>Set to match station Prime DN</i>
<b>19 VMID Code</b>	<i>Leave this field Blank; do not enter anything!</i>	<i>Set to match station Prime DN</i>
<b>22 MW to VM Port</b>	<i>Leave this field Blank; do not enter anything!</i>	<i>Enter Pilot DN for the VM Hunt Group<sup>2</sup></i>
<b>23 Mailbox Selection</b>	<i>Select between <b>Auto Input</b> and <b>Manual Input</b> for Voice Mail Call record.</i>	

### Program 209: Hunt Groups

Create a hunt group that includes all voice mail ports (see Note 6 on **Program 579:02** for IBS Programming)

<b>01 Hunt Method</b>	<i>Distributed</i>
<b>02 Pilot Number</b>	<i>Enter the Pilot DN for the Voice Mail Hunt Group<sup>2</sup></i>
<b>04 Number to Display</b>	<i>Enter the Pilot DN for the Voice Mail Hunt Group<sup>2</sup></i>
<b>07 DHG Auto Camp-on</b>	<i>Enable</i>

1. If the VM uses a Dedicated Notify Port (e.g. Port number 8 on a Four Port CDK does the notification), then you must include that port in this program.
2. Programs 200:15 (for voice mail ports), 200:22 (for station ports), 209:02, 209:04, 579:10, and 579:16 should all use the same Pilot Number.

### Program 218: Station Hunt Assignments

Add all **Voice Mail Stations** created in **Program 200** to the Hunt Group created in **Program 209**

**Part II (a) – System Programming for In-band Signaling (Programs 579, 580)****Program 579: System Voice Mail Data**

	<b>Perfect Communicator Strategy BSTU</b>
<b>01 DID/DNIS VMID Option</b>	<i>DN VMID</i>
<b>02 Cancellation Method for MW</b>	<i>Access Code Cancel</i> <sup>6</sup>
<b>07 Auto Cancel of VM and MW</b>	<i>Enable</i>
<b>10 Central VM Callback</b>	<i>Leave Blank!</i>
<b>11 CF – All Call Record</b>	<i>Enter 8</i> (See note 3)
<b>12 CF – Busy Record</b>	<i>Enter 8</i> (See note 3)
<b>13 CF – No Answer Record</b>	<i>Enter 8</i> (See note 3)
<b>14 Direct Call to VM</b>	<i>Enter 7</i> (See note 4)
<b>15 Retrieve Messages</b>	<i>Enter 7</i> (See note 4)
<b>16 Transfer Direct to VM DN</b>	<i>Enter Pilot DN</i> <sup>1</sup>

**Program 580: Voice Mail Port Data**

<b>01 Control Method</b>	<i>Select In-band</i>
<b>02 Send A/D Tone</b>	<i>Enable</i>
<b>03 Send B Tone</b>	<i>B Tone and Extension Number</i>
<b>04 End-to-End</b>	<i>Enable</i>
<b>07 VM to VM Call Blocking</b>	<i>Blocking</i> (If you experience problems with integration on Busy and DND calls, you may need to set this to <b>Non Blocking</b> .)

1. Programs 200:15 (for voice mail ports), 200:22 (for station ports), 209:02, 209:04, 579:10, and 579:16 should all use the same Pilot Number.
2. The number the Voice Mail looks for can be changed in IBS Settings in the Admin program.
3. The number the Voice Mail looks for can be changed in Screens (System » Integration)
4. The number the Voice Mail looks for can be changed in Screens (Receptionist » Instance Setup » System Access Code)
5. Integration can be whatever you want; the “standard” is to use 7E in parameter #185, and 8E in parameters #186 and #188.
6. If using a Dedicated Notify Port that is *not* part of the VM Hunt Group (program 209 and 218) then set to **Auto and Access Code Cancel**. If you do not want to have the MWI automatically extinguished on access and you are having problems with the MWI, then include the Dedicated Notify Port in the VM Hunt Group and set call blocking on for that station port.

**Part II (b) – System Programming for SMDI (Programs 579, 580, 804, 803)****NOTE**

The slot occupied by Perfect Voice Strategy BSTU should be programmed as a **RSTU/BSTU** card.

**Program 579: System Voice Mail Data**

<b>01 DID/DNIS VMID Option</b>	<i>DN VMID</i>
<b>02 Cancellation Method for VM MW</b>	<i>Auto and Access Code Cancel</i>
<b>03 Message Desk Number</b>	<i>Enable</i>
<b>04 Output of CLASS/ANI and DNIS</b>	<i>Enable</i>
<b>05 Calling Number Digits Sent to VM</b>	<i>Enable</i>
<b>07 Auto Cancel of VM and MW</b>	<i>Enable</i>
<b>09 LCD Control of Voice Mail</b>	<i>Enable</i> (Must be enabled to allow CTX Call Record feature)
<b>10 Central VM Callback</b>	<i>Enter Pilot DN</i> (Programs 200:15 (for voice mail ports), 200:22 (for station ports), 209:02, 209:04, 579:10, and 579:16 should all use the same Pilot Number.)
<b>16 Transfer Direct to VM DN</b>	<i>Enter Pilot DN</i> (Programs 200:15 (for voice mail ports), 200:22 (for station ports), 209:02, 209:04, 579:10, and 579:16 should all use the same Pilot Number.)
<b>17 Length of VM ID</b>	<i>10</i>

**Program 580: Voice Mail Port Data**

<b>01 Control Method</b>	<i>Select SMDI</i>
<b>02 Send A/D Tone</b>	<i>Enable</i>
<b>04 End-to-End</b>	<i>Enable</i>
<b>07 VM to VM Call Blocking</b>	<i>Blocking</i> (If you experience problems with integration on Busy and DND calls, you may need to set this to <b>Non Blocking</b> .)

**Program 804: Voice Mail Port Data**

<b>00 BSIS Port Number</b>	<i>Select port you want to use for SMDI (1~4), use this in Program 803:02</i>
<b>01 Port Speed</b>	<i>1200</i>
<b>02 Port Parity</b>	<i>Even</i>
<b>03 Data Bits</b>	<i>7 Bits</i>
<b>04 Flow Control</b>	<i>None</i>
<b>05 Wait Timer</b>	<i>1</i>

**Program 803: SMDI Port Assignments**

<b>00 Logical Device Number</b>	<i>Select 300 SMDI #0</i>
<b>01 Device Connection</b>	<i>RS232</i>
<b>02 Device Port Number</b>	<i>Select the Port configured in Program 804:00</i>

## Programming Toshiba Strata DK Telephone Systems

**IMPORTANT:** The trunk access codes for outbound calling is 9 for local line access.

### NOTE

All transfers are blind.

Following is a list of the hardware required by the telephone system to work with the Perfect Voice Strategy BSTU.

- The telephone system must have an analog port/extension for each port of the system.
- The telephone system must have sufficient DTMF receiver channels.
- RJ-11 telephone jacks must be installed within 2 feet of the Perfect Voice Strategy BSTU system. Perfect Voice Strategy BSTU interfaces to the telephone system by plugging a 2 conductor modular jack into the RJ-11.

Following is a list of the DK Series programs required to work with the Perfect Voice Strategy BSTU.

- Program 03 - correctly identify the common control card with K4RCU and QSTU, PESU, KSTU or PSTU slots. Be sure to cycle the system power after changes in this program.
- Program 10-2 - LED 02 (for DK16), LED 04, LED 06 and LED 11 must be turned on.
- Program 12 - code 4 must be set to 1 (0.5 sec.).
- Program 15 - codes 0, 3 and 5 must be on for all CO lines on the system.
- Program 31 - LED 05, 09, 15, 16, 17, and 20 must be on for all ports on the Perfect Voice Strategy BSTU system.
- Program 33 - program the first Perfect Voice Strategy BSTU port to hunt to the second. The second port to hunt to the third, etc. The last port in the hunt group should be the attendant position or DSS console.
- Program 35 - LED 19 must be on for all telephones on the system. LED 20 must be all for all Perfect Voice Strategy BSTU ports on the system.
- Program \*40 – Assign the Perfect Voice Strategy BSTU ports to a distributed hunt group
- Program 81-89 - program the proper assignments for CO line ringing to station ports and/or the Perfect Voice Strategy BSTU ports.

### Note

Program 10-3 for SMDI installations with Caller ID, Led 08, 11, 13, and 14 should be turned on.

Every system should have a reliable method of bypassing the automated attendant. A common method for bypassing Perfect Voice Strategy BSTU is to program delayed ring of the CO lines to the human attendant. This method provides your customer with a convenient method of bypassing Perfect Voice Strategy BSTU during periods of system maintenance.

Anything considered as part of the “final cutover” such as forwarding stations and routing trunk calls to Perfect Voice Strategy BSTU should not be performed until all training and Perfect Voice Strategy BSTU configuration is complete. All calls to extensions on the Perfect Voice Strategy BSTU system are blind transfers with integration. **Do Not** use any type of call forwarding which includes busy because this will cause collisions between the Perfect Voice Strategy BSTU attempting to reconnect to the caller and the DK attempting to forward to the Perfect Voice Strategy BSTU at the same time.



**All telephones should be programmed with the following features:****Call Forward-Busy/No Answer:**

Set Call Forward-Busy/No Answer to the distributed hunt group by pressing:

<CALL FRWD> + (N)NN+<CALL FRWD>                      Where (N)NN is the hunt group number, or

<INT>+#604+(N)NN+<SDS>+XX+REDIAL+SPKR      Where XX=ring before forward timer

**Voice Mail ID Codes:**

Assign a User ID for message storage: <INTERCOM>#656+8(N)NN+<REDIAL>+SPKR

Assign a User ID for message retrieval: <INTERCOM>#657+7(N)NN+<REDIAL>+<SPKR>

Where (N)NN is the User ID

**Step 4: Shut Down Telephone System**

Turn off the main power switch to the Strata CIX/CTX or DK telephone system.

## Step 5: Install Perfect Voice Strategy BSTU

### 1. Locate available slot for PV Strategy BSTU.

If there is not an available slot for PV Strategy BSTU, stop here. If a T1, DID or TIE line card needs to be relocated to make room for PV Strategy BSTU, do so now. Make sure the necessary programming changes are made to account for this move.

### 2. Install Perfect Voice Strategy BSTU according to the following steps.

#### NOTE

Allow PV Strategy BSTU to sit at room temperature for at least 3 hours before applying any power. Shipping can expose PV Strategy BSTU to temperature extremes. Let PV Strategy BSTU adjust to room temperature to avoid any possible damage from condensation, etc. Ensure that the battery is secure before installation.

#### CAUTION - Battery Replacement

The PV Strategy BSTU battery can **ONLY** be replaced with a 3 volt Lithium coin battery, number **CR2032**. There is a risk of explosion if the incorrect battery is used. Dispose of used battery according to the battery manufacturers instructions.

- Remove PV Strategy BSTU from its protective package. Remember to handle the PV Strategy BSTU card with care. Wear an anti-static wrist strap and hold the card by its edges.
- Insert the PV Strategy BSTU PCB into the appropriate slot and apply firm, even pressure to ensure proper connection. **CAUTION:** Do not insert the board too slowly and make sure the board is pushed all the way in or the key system may behave in an unexpected manner. In most cases, however, this behavior will correct itself within a couple of minutes.
- After installing, gently pull the card outward. You should feel a slight resistance. If you don't feel the resistance, apply pressure again.

## Step 6: Restart CIX/CTX/DK and Verify PV Strategy BSTU Is Functioning Properly

Each PV Strategy BSTU has been preprogrammed at the factory for out-of-box operation on the telephone system. This includes the integration and configuration parameters, and company greeting and instructions.

- Turn on the main power switch to the CIX/CTX/DK system. Let it proceed without any action from you. The Power LED should turn green when the system is operational.
- Dial the extension number for each port. PV Strategy BSTU should (for each port) answer and play the default company greeting (“Thank you for calling...”).

## Step 7: Configuring the System

The following steps may be performed over the telephone. For more information on configuring the system with the SCREENS interface, refer to the *Perfect Voice Installation & Maintenance Manual*.

To configure Perfect Voice Strategy BSTU, you must complete the following steps:

- A. Set the System Date and System Time, page 14
  - B. Select the Telephone System, page 15
  - C. Select the Dialplan, page 16
  - D. Record the system greetings and whattodos, page 17
  - E. Set Business Hours, page 21
- Perform Training, page 29

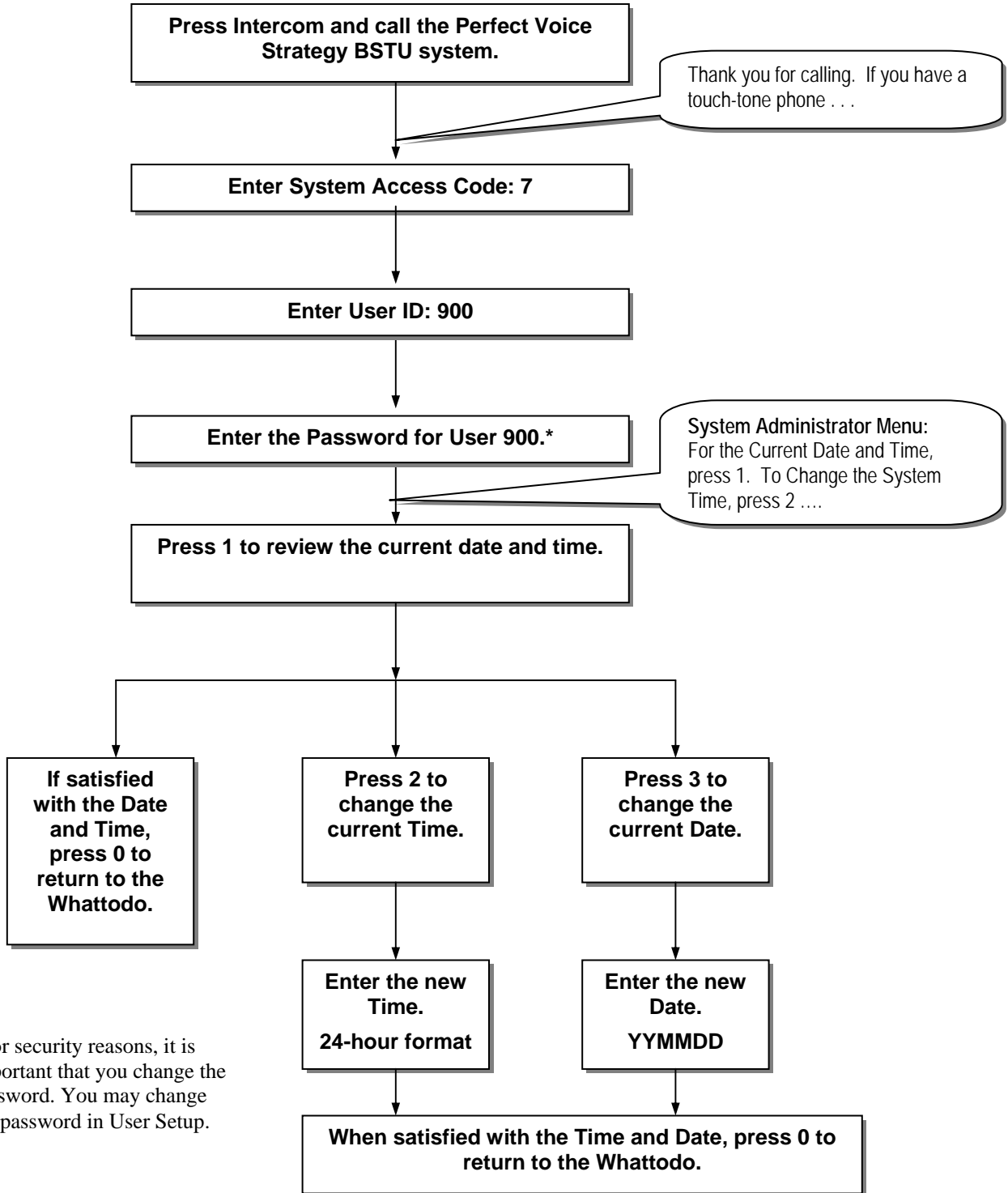
The following steps are optional (depending on system features and preferences)

- F. Configuring the System for SMDI, page 23
- G. Pager Notification, page 24

## A. Set the System Date & System Time

The system date and time must be set for the system to operate properly. If the system date and time is not set or the system has been reset, the following message plays: **“The current system date is invalid.”**

Perform the following steps to set the system date and time.



## B. Selecting the Telephone System Type

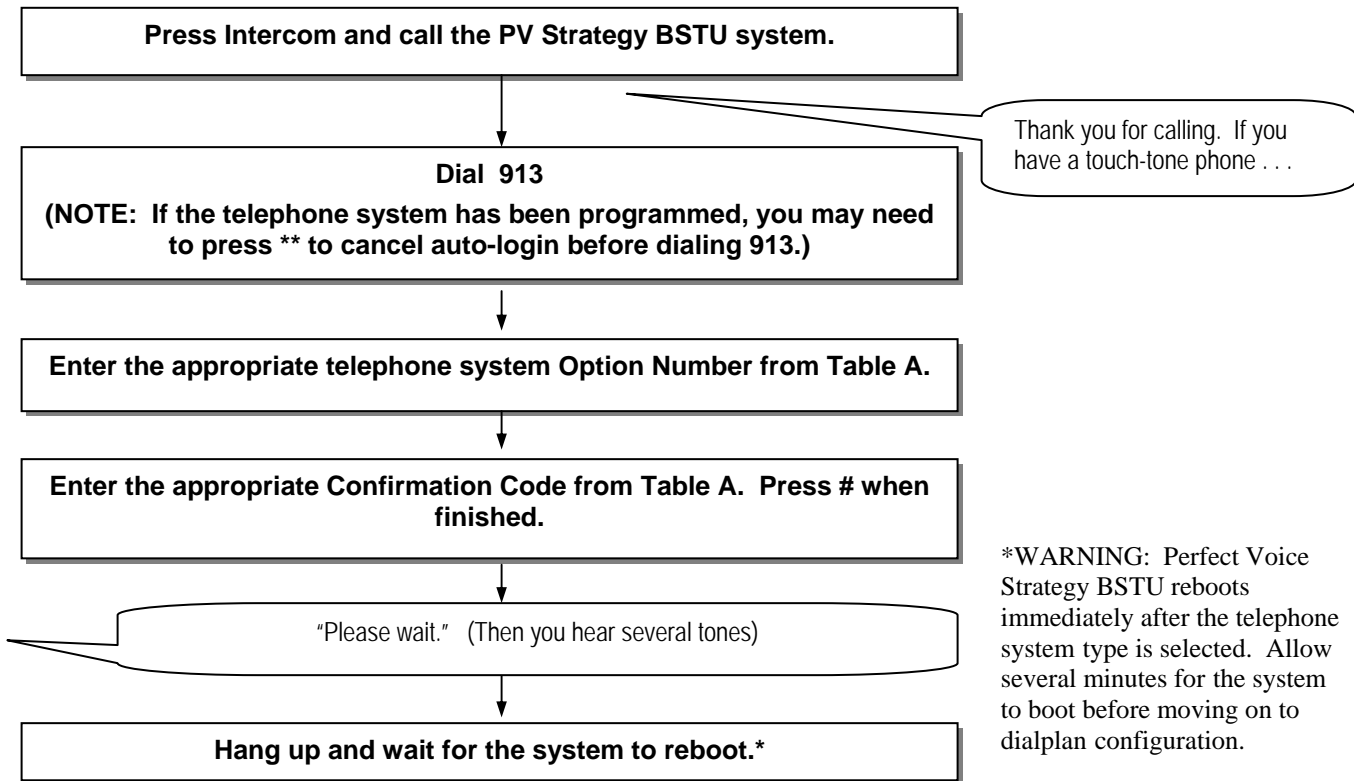
**NOTE:** The Perfect Voice Strategy BSTU is designed to work only with Toshiba Strata CTX, CIX or DK telephone systems (but not CTX28 or CIX40).

### Selecting the Telephone System Type Using the Telephone

The first time you turn on the system, you will need to set the correct telephone system type for this installation. Refer to Table A for the list of telephone system types and appropriate options that may be selected.

**Table A**

Option Number	Confirmation Code	Telephone System Description	Message Light On Code	Message Light Off Code	Integration
1	9016	Toshiba DK 16, 56, 96	63 + extension	64 + extension	DTMF
2	9024	Toshiba DK 14, 16e, 40, 40i, 280, 424, 424i Toshiba CIX/CTX 100, 670	#63 + extension	#64 + extension	DTMF
3	9424	Toshiba DK 40, 40i, 280, 424, 424i Toshiba CIX/CTX 100, 670	SMDI (Rel. 3.X or greater)	SMDI (Rel. 3.X or greater)	SMDI (Rel. 3.X or greater)
4	9008	Toshiba DK 8	63 + extension	64 + extension	DTMF



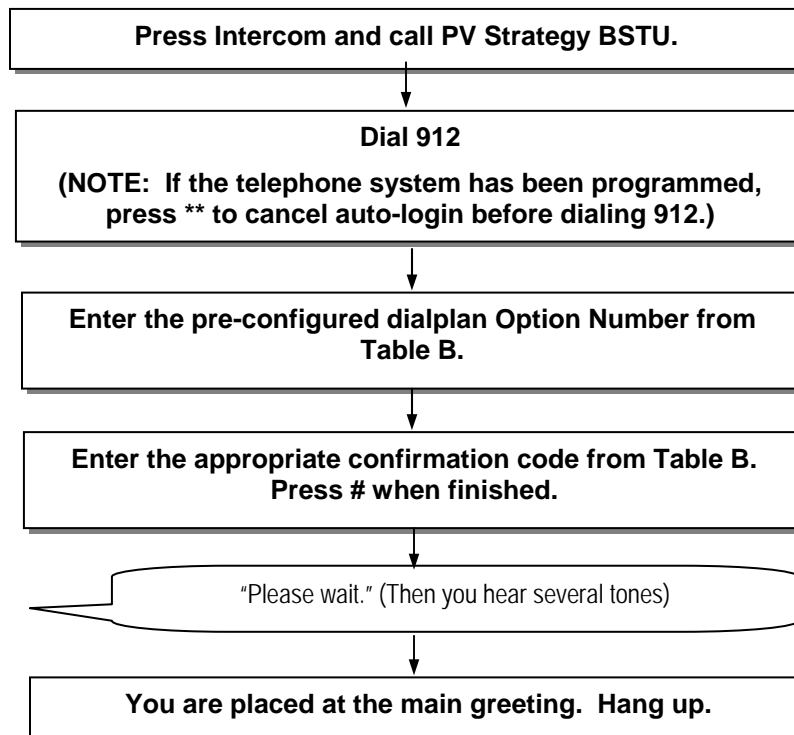
### C. Selecting a Pre-configured Dialplan

It is important to pay close attention when selecting a dialplan. Be absolutely certain of the dialplan you want before you begin this step. It is strongly recommended to use the 2 digit or 3 digit pre-configured dialplans on all Toshiba telephone systems as they have been tailored for these systems. Table B illustrates the dialplans available. You may select a pre-configured dialplan via the telephone, Admin Graphical Manager, or SCREENS interface. If you wish to create a custom dialplan or add to the current dialplan, refer to “Appendix B: Create a Custom Dial Plan”.

**NOTE:** Once you have selected a pre-configured dialplan, it is not possible to select a different pre-configured dialplan without accessing the User Directory in the SCREENS interface and pressing F7 to delete the range of Users that have already been created. All local configuration information, personal greetings, names, and messages will be lost. Single Digit Users may be configured as audiotext or additional Audiotext Users may be added using Appendix C.

**Table B**

Option Number	Confirmation Code	Dialplan Description	Normal Users	Outside Users
1	1001	2 – digit	10-59	600 – 649
2	2002	3 – digit	100-199	600 – 649
3	3003	3 – digit	200-299	600 – 649
4	4004	3 – digit	300-399	600 – 649
6	6006	2 – digit with SMDI	10 – 59	600 – 649
7	7007	3 – digit with SMDI	100 –199	600 – 649
8	8008	3 – digit with SMDI	200 - 299	600 – 649
9	9009	3 – digit with SMDI	300 - 399	600 – 649



NOTE: Changes will not become active until the next call into the system. Please hang up and call back into the system to verify changes.

## D. Record System Greetings and Whattodos

Customized greeting and whattodo for open and closed mode operation should be recorded during the installation process.\*

The first prompt a caller hears when reaching the Perfect Voice Strategy BSTU is the greeting. The open greeting is recorded in the personal greeting number 1 of User 980. The closed greeting is recorded in the personal greeting number 3 of User 980. This prompt is heard only once during a call. The greeting should welcome the caller and, like a human operator, confirm that the caller has reached the correct number.

*“Thank you for calling ABC Company.”*

The greeting should also contain any additional information the caller should hear only *once*.

*“Thank you for calling ABC Company. Our office is currently closed.”*

Immediately following the greeting, Perfect Voice Strategy BSTU plays the whattodo. The open whattodo is recorded in the personal greeting number 2 for User 980. The closed whattodo is recorded in the personal greeting number 4 of User 980. The whattodo informs the caller “what-to-do”, or gives the caller options.

*“If you know the extension number of the person you wish to reach, please enter it now. For directory assistance, press 9 or hold for assistance.”*

If single digit options are used, they should be included as part of the whattodo. There are several states during the duration of a call in which the caller is brought back to the whattodo.

- After leaving a message
- After entering an invalid selection or extension number
- After pressing 0 to exit from User mode
- After listening to an audiotext message

When writing the script for the whattodo, three things should be kept in mind:

1. The whattodo is played immediately after the greeting, so the transition between the greeting and whattodo should flow smoothly.
2. Callers may eventually come back to the whattodo, so the whattodo must make sense without being prefaced by the greeting.
3. It is tempting to offer the caller as many options as possible. However, most callers only want one thing. That is to *talk* to someone. Give the caller no more than three or four options in the whattodo.

Refer to the System Greeting Scripts worksheet to record the greeting and whattodo for both open and closed modes. All recordings should be made from a quiet environment.

\*If you are familiar with how Perfect Voice Strategy BSTU greetings work, you may skip to “Recording System Greetings” on page 19.

**System Greeting Scripts**

Description	Written Script
Open greeting (980-Greeting 1)	<hr/> <hr/> <hr/>
Open whattodo (980-Greeting 2)	<hr/> <hr/> <hr/> <hr/> <hr/>

Closed greeting (980-Greeting 3)	<hr/> <hr/> <hr/>
Closed whattodo (980-Greeting 4)	<hr/> <hr/> <hr/> <hr/> <hr/>

**Pre-Defined Users For Greetings and Whattodos**

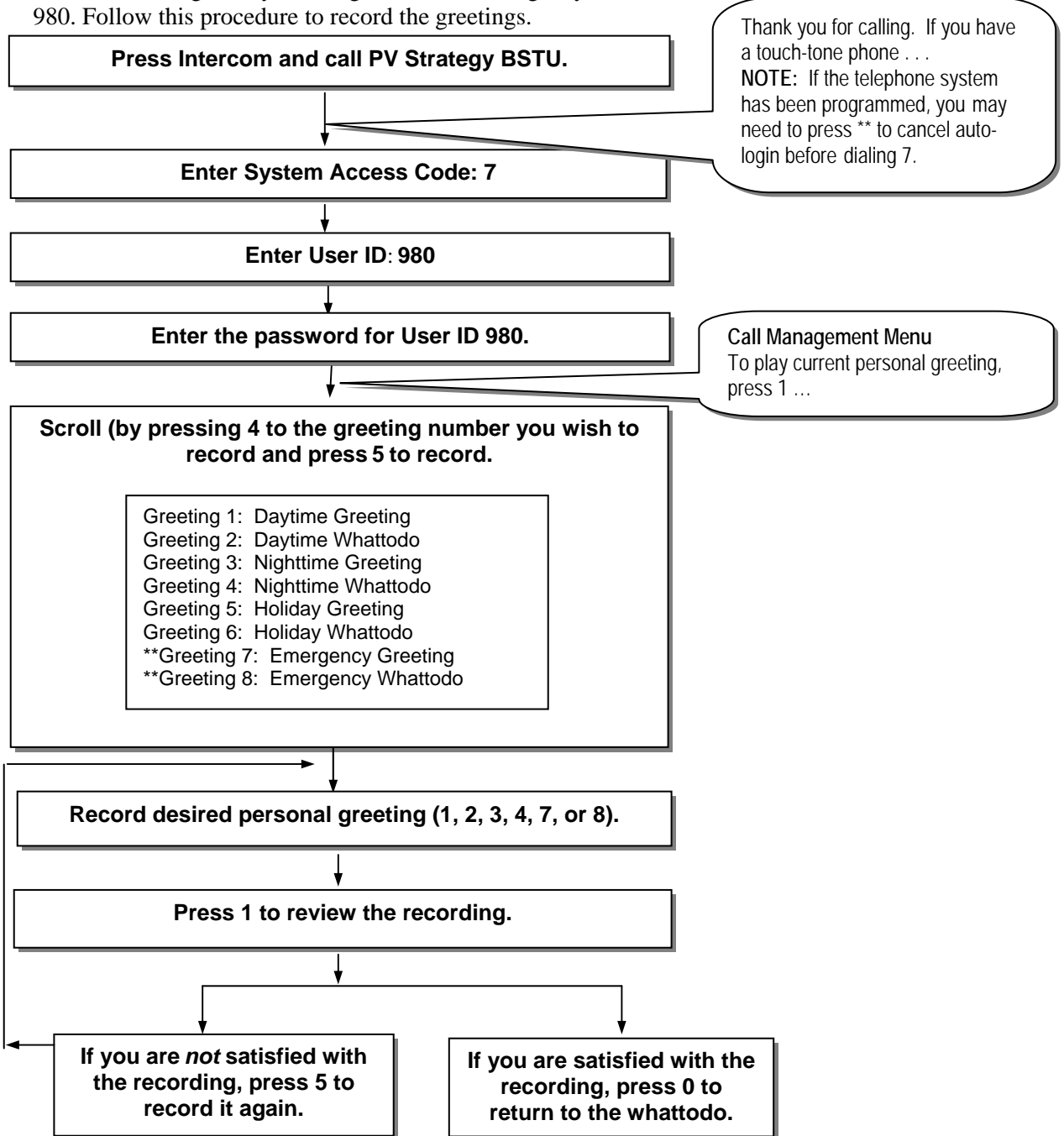
All greetings and whattodos (daytime, nighttime, and emergency/temporary) are recorded from one User ID – User ID 980. The greetings and whattodos are recorded as individual greetings (UV1-UV4 and UV7-UV8) for this User.

- Greeting 1 (UV1): Daytime Greeting
- Greeting 2 (UV2): Daytime Whattodo
- Greeting 3 (UV3): Nighttime Greeting
- Greeting 4 (UV4): Nighttime Whattodo
- Greeting 5 (UV5): Holiday Greeting
- Greeting 6 (UV6): Holiday Whattodo
- Greeting 7 (UV7): Emergency Greeting
- Greeting 8 (UV8): Emergency Whattodo



### Recording System Greetings

The process of recording of the greeting and whattodo for open, closed, or holiday mode is the same as recording a personal greeting in a mailbox, only the User ID and password are different. All greeting and whattodo messages (daytime, nighttime, and emergency) for the main company may be recorded in User ID 980. Follow this procedure to record the greetings.

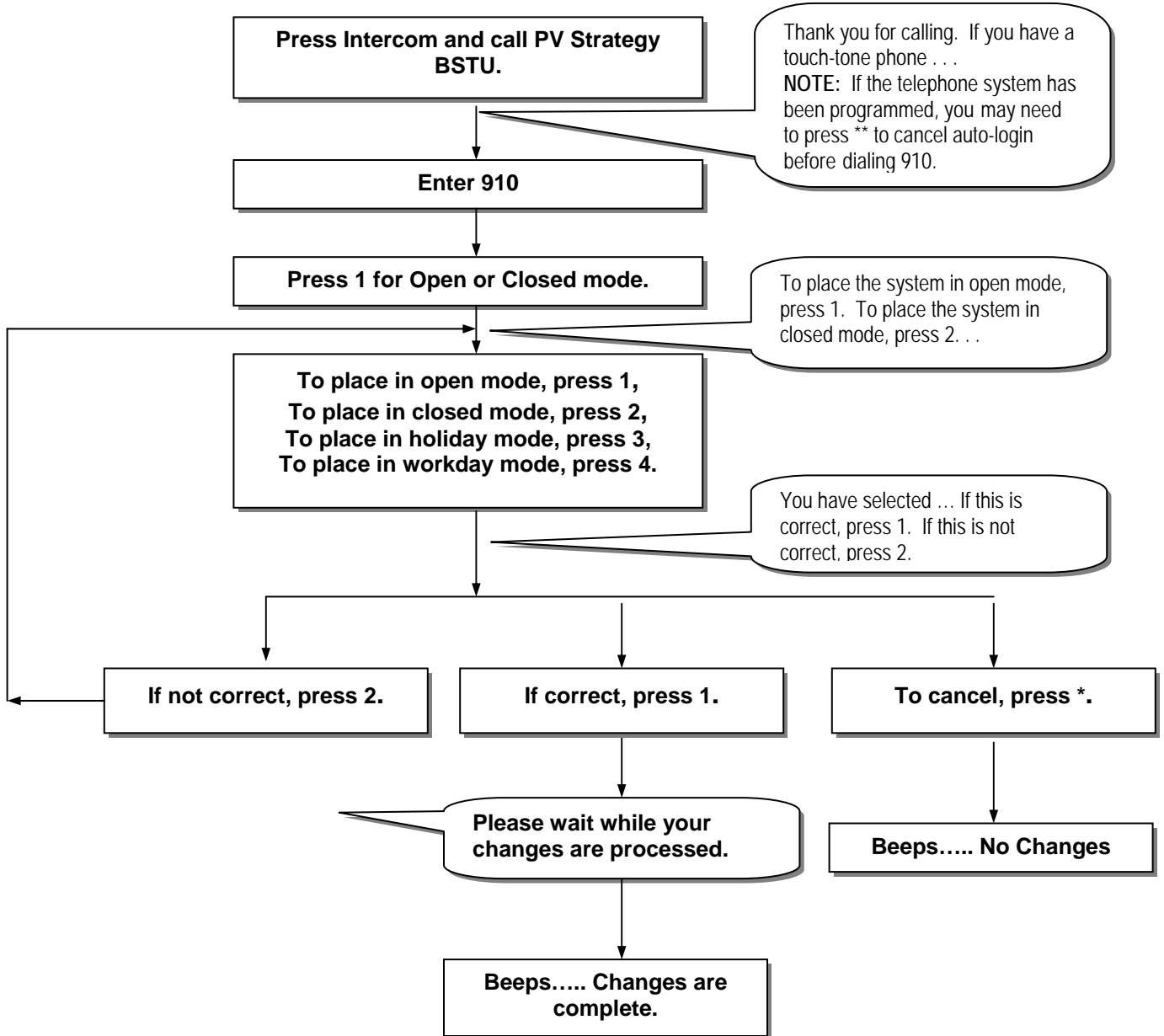


**NOTE:** To activate a new open greeting and whattodo or holiday greeting, see “Manually selecting Open and Closed mode”.

\*\*Greetings 7 and 8 will immediately override the current greeting until the next change from day or night. This change may be done manually or scheduled.

### Manually Select the Open or Closed Mode

Once the greeting and whattodo for open and closed mode have been recorded, the new recordings may be activated immediately using the following procedure for manually selecting open or closed mode. Otherwise, the new recordings will play at their regularly scheduled time.



NOTE: Changes will not become active until the next call into the system. Please hang up and call back into the system to verify changes.

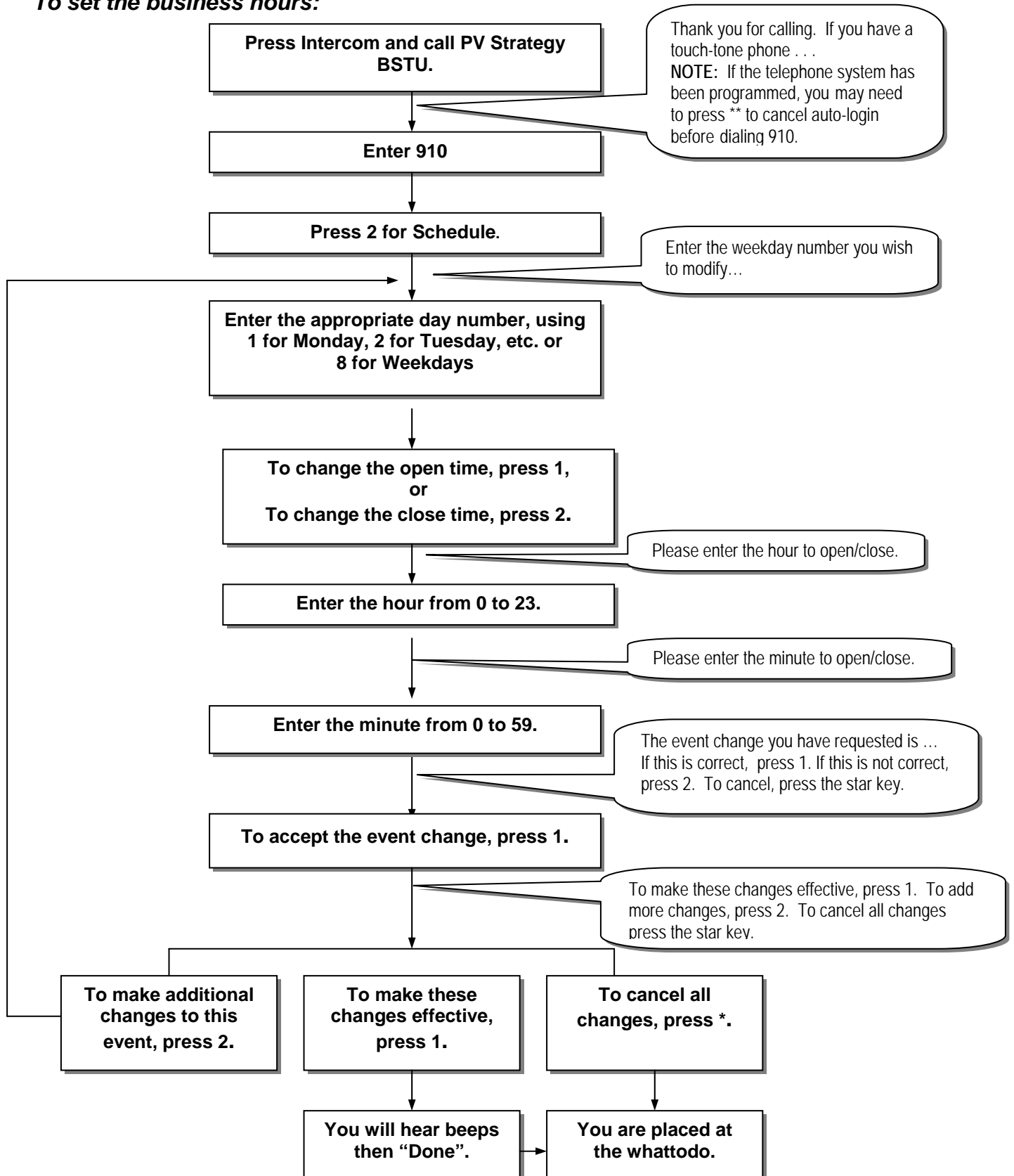
## E. Setting the Business Hours

Perfect Voice Strategy BSTU automatically schedules events to run on specific days of the week at specific times. You may activate an event which places the system in open mode during normal hours of operation (plays the open greeting and whattodo) and another event which places the system in closed mode for after hours operation (plays the closed greeting and whattodo). Refer to the worksheet below while activating open and closed modes.

**NOTE: If you plan to use the same greeting/whattodo 24 hours a day, no adjustments should be made to the scheduler.**

	Day	Open time for open greeting to play	Closed time for closed greeting to play
1	Monday		
2	Tuesday		
3	Wednesday		
4	Thursday		
5	Friday		
6	Saturday		
7	Sunday		
8	Weekdays - Mon-Fri		

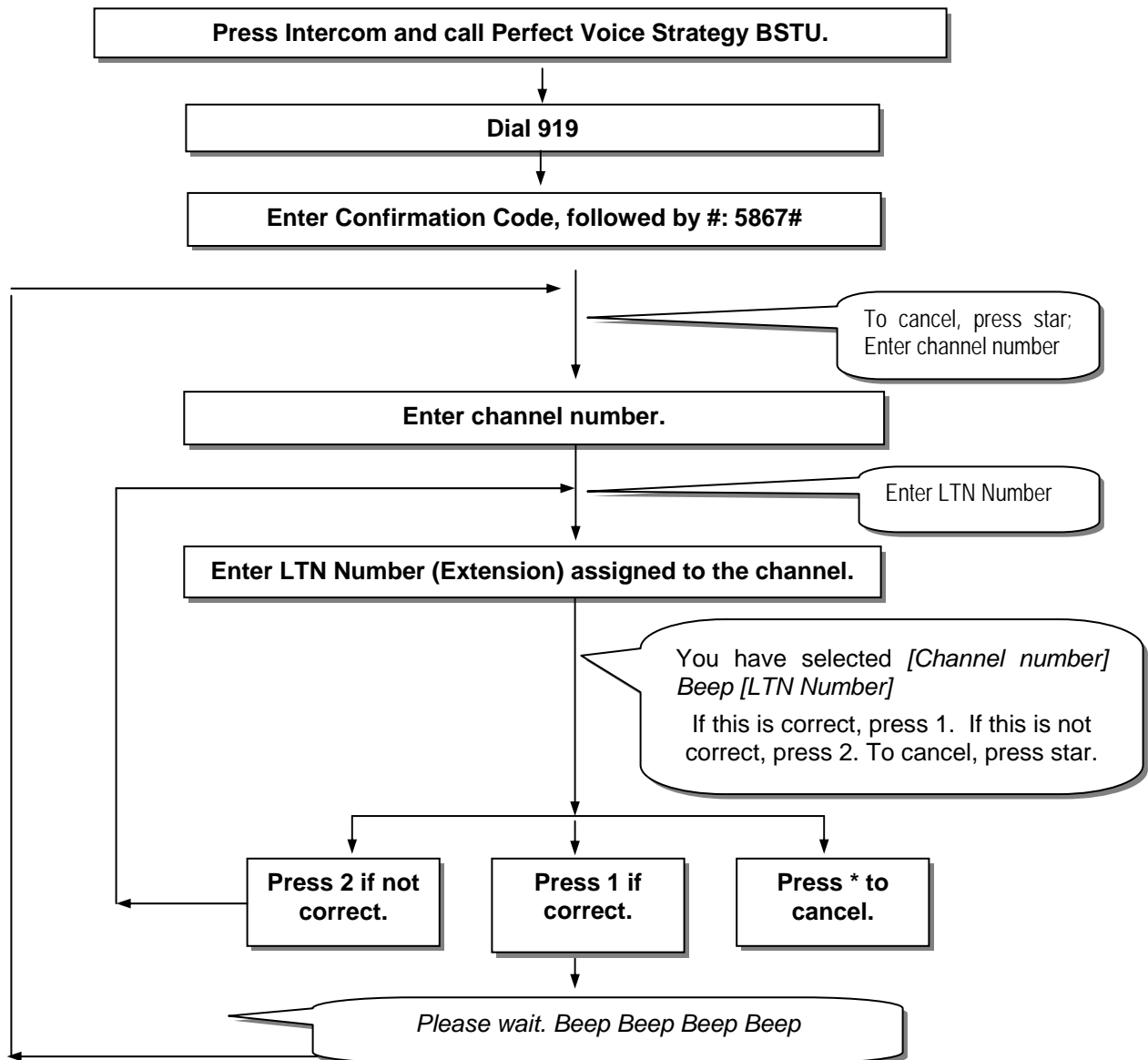
**To set the business hours:**



## F. Configuring the System for SMDI

To enable SMDI integration you must first follow the steps in “Selecting the Telephone System Type” and select option 3. An important factor when installing any SMDI system is the definition of the relationship between the channel numbers (voice mail ports) and the Logical Terminal Numbers (LTN) (physical extensions) they are connected to.

Channel #	LTN	Channel #	LTN	Channel #	LTN	Channel #	LTN
0		4		8		12	
1		5		9		13	
2		6		10		14	
3		7		11		15	



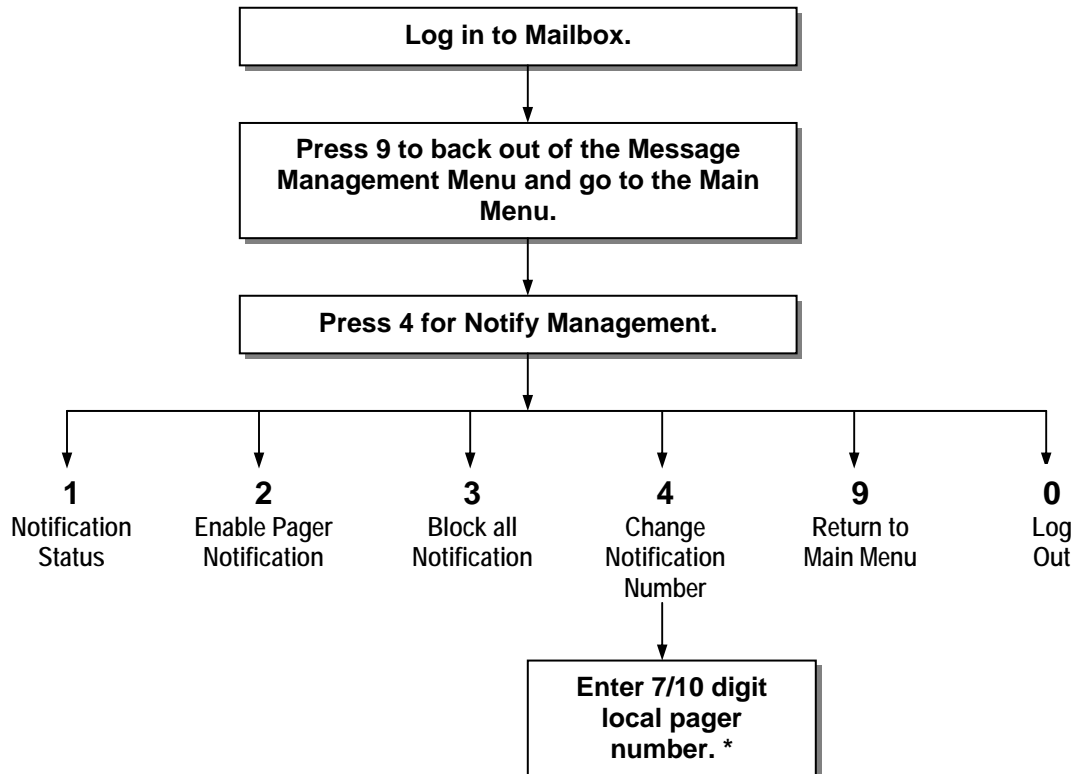
**You must start SMDI on COM1.** Call the system, dial 978 then dial 978 again. Hang up after you hear the beeps and whattodo. This disables Klinik and starts SMDI on COM 1. **It is very important that you HANGUP when you hear the beeps or the process will not be complete.**

Refer to Appendix A for more information. **NOTE:** Perfect Voice Strategy BSTU reboots after this step.

## G. Pager Notification

Pager notification may be activated for any User or Outside User ID on the Perfect Voice Strategy BSTU system. If pager notification is active, the User's pager is activated for every new message every day, twenty-four hours a day. The User may activate and deactivate pager notification from within their User mailbox. When the User receives a new message, 9's will appear on the pager display. This is the notification that there are messages in his or her Perfect Voice Strategy BSTU mailbox.

### To activate/deactivate Pager Notification:



**\*NOTE:** The pager number must be local. It is not necessary to place a 9 (Trunk Access Code) in the notification dialstring.

## Notification Cycle

Moments after a message is left, the pager is called. If the User does not call in to pick up the new message, the pager will be called approximately 10 minutes from the initial attempt. The delay between attempts increases the longer the message goes un-retrieved. The delay continues, adding 10 minutes to each attempt, not to exceed 1 hour between attempts. The table below contains an example of the paging cycle for an un-retrieved message left at 9:00 AM.

Attempt	Accumulated Delay	Example
First	No delay	9:00 AM
Second	10 Minutes	9:10 AM
Third	20 Minutes	9:30 AM
Fourth	30 Minutes	10:00 AM
Fifth	40 Minutes	10:40 AM
Sixth	50 Minutes	11:30 AM
Seventh	60 Minutes	12:30 PM
Eighth	60 Minutes	1:30 PM
Ninth	60 Minutes	2:30 PM
Tenth	60 Minutes	3:30 PM

**Note:** All notification attempt schedules reset upon receipt of each new message. For this reason if you receive a new message every 5 minutes, your pager will go off every 5 minutes for each new message.

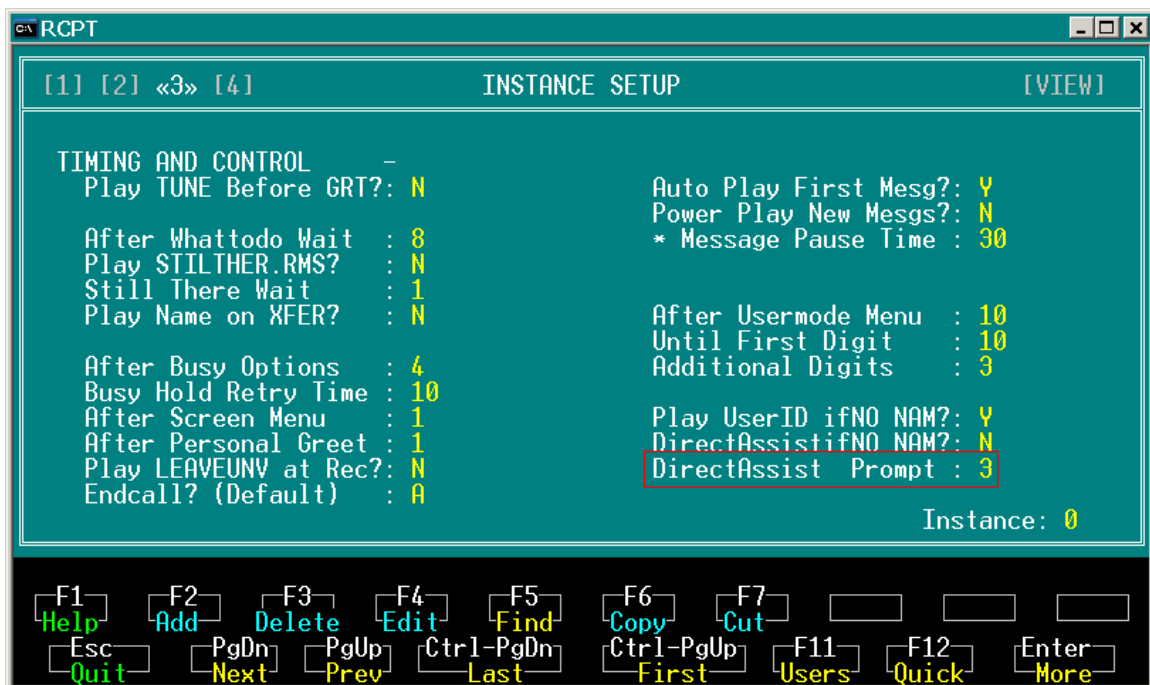
## H. Directory Assistance

When callers don't know their party's extension, they may use Directory Assistance to connect to the correct person. The caller uses the telephone keys to "spell out" a user's name. Perfect Voice Strategy BSTU may be configured to allow callers to either spell out the last name only (default setting), first name only, or the first or last name to reach the User.

### Search Directory Assistance by First or Last Name

To change the default setting (which allows callers to search by last name only):

- Log in to **SCREENS**
- Select **RECEPTIONIST**
- Select **INSTANCE SETUP**
- Select the Instance for which you would like to change Directory Assistance to use first or last name.
- Go to Screen 3 and press **F4**
- Edit the **DirectAssist Prompt** field. This field may be set to 0, 1, or 3.
  - **0**: When DirectAssist Prompt is set to 0, callers may search by last name only. 0 is the default setting.
  - **1**: When DirectAssist Prompt is set to 1, callers may search by first name only.
  - **3**: When DirectAssist Prompt is set to 3, callers may search by first or last name.
- Press **F10** to save changes.
- You must completely exit **SCREENS** for this setting to become active.



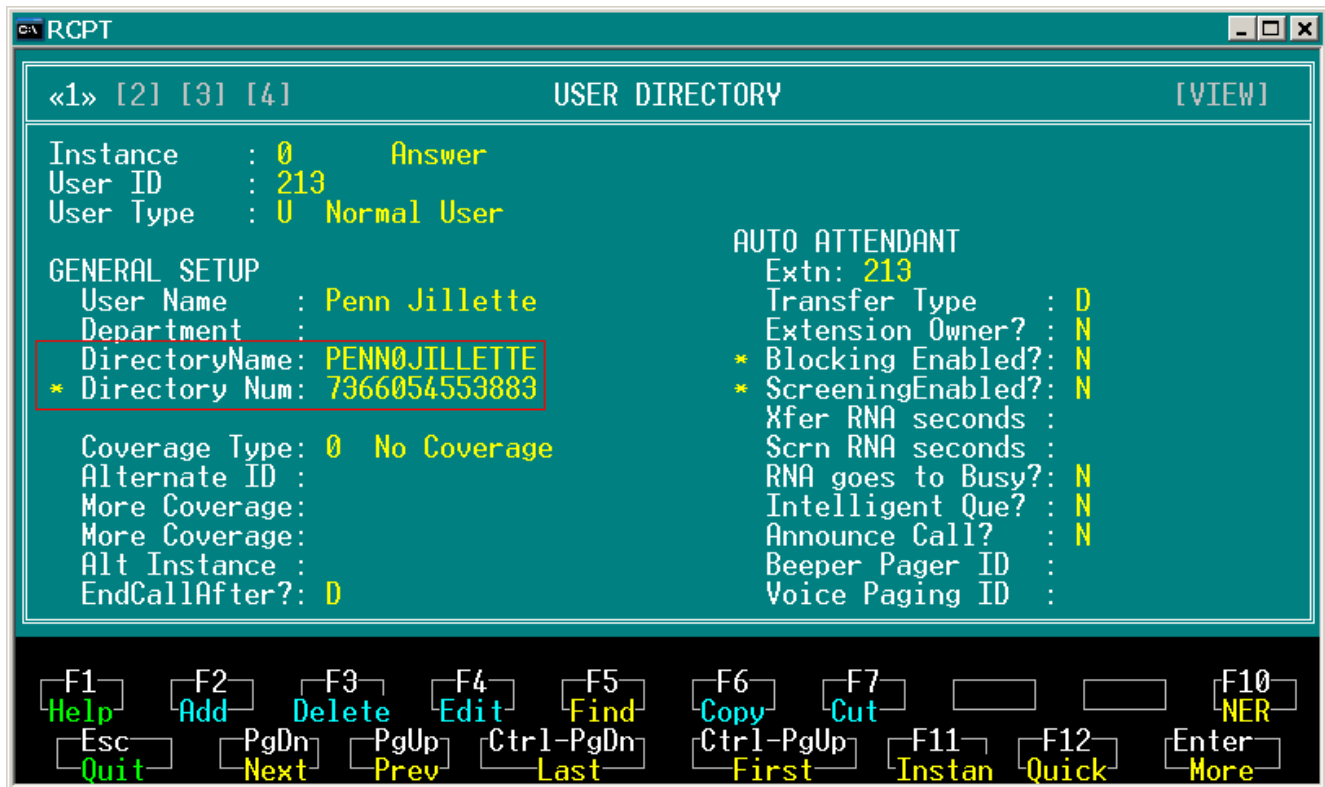


## Set up Users for Directory Assistance

The first time Users log into the system, they are placed into Quick Setup, which must be completed before they can receive messages. One of the steps in Quick Setup prompts the User to spell his or her name for Directory Assistance, just as a caller would. When the Instance is configured for searching on first or last name, Users are prompted to “enter (up to) the first six letters of your first name, followed by a zero, then enter (up to) the first six letters of your last name...”

The Directory Assistance listing may also be configured from SCREENS.

- Log in to **SCREENS**
- Select **RECEPTIONIST**
- Select **USER DIRECTORY**
- Go to Screen 1, press **F4**
- Edit the **DirectoryName** field: Enter **first0last** (User’s first name, zero, User’s last name) in this field to search by first or last name. The letters you enter in this field will automatically be converted to the corresponding numbers in the Directory Num field. (The Directory Num field cannot be modified directly.)
- Press **F10** to save changes.



### Directory Num

This field indicates the numeric sequence associated with the **Directory Name** field spelling or the directory assistance listing specified by the User during Quick Setup or User Setup. This field cannot be modified directly from SCREENS, but can be modified indirectly by entering information into the **Directory Name** field. Likewise, this field can be specified directly from Quick Setup or User Setup. The letters are translated into numeric digits as follows.

### ***Additional fields related to Directory Assistance***

Instance – Screen 3

**DirectAssistifNo NAM?:** This field specifies whether or not to list this User ID in Directory Assistance if no name is recorded.

Instance – Screen 2

**Directory Assist:** This field specifies the selection made by callers and Users to access directory assistance. This code can be entered from any point in the system where the system requests a User ID. The default value is 9.

# Training

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## Console Operator Training

The console operator plays a crucial role in many telecommunications environments. The console operator should be comfortable with performing the following tasks.

- Transfer a caller to Perfect Voice Strategy BSTU (main greeting).
- Transfer a caller to a User's message box using 997.
- Transfer a caller to a User's personal greeting using 8.
- Explain the basic operation of the system to a caller (i.e. "...enter the person's extension...")

## System Administrator Training

The System Administrator should understand at least the basics of how Perfect Voice Strategy BSTU operates. Familiarize the System Administrator with all features available to Users. Have the System Administrator carefully review the System Administration section of this guide and answer any questions the System Administrator may have.

The System Administrator is often your primary on-site contact. It is very important to get this person comfortable with not only the administration of the system, but its usage as well. Users look to the System Administrator as the person who knows the system's features and capabilities. If the System Administrator is not comfortable with the system, your organization will end up fielding many more questions from the site than necessary. This ultimately can lead to a dependence of site personnel on your organization to perform basic System Administrator tasks.

The System Administrator should be comfortable with performing the following tasks.

- Reset a User who is no longer on the system
- Reset the password for a User
- Record personal greeting for audiotext announcement
- Record system greeting
- Record system whattodo
- Place the system in open/closed mode
- Set Schedule

## User Training

The User is the most important person on every site. An untrained User community results in dissatisfaction and frustration with the system. This, in turn, can lead to serious political problems with getting the system accepted. Since acceptance of the system, especially in the early stages of an installation is critical to its success, proper training of the User community can be just as, if not more important than, the technical aspects of the installation.

The system should be fully functional, but not yet on-line during the training period. Ideally, Users are allowed to work with the system's capabilities (sending messages, recording personal greetings, etc.) for a few days after training and before the final cutover.

Although most Users complete Quick Setup, which guides them through the process of setting up their message box, all Users should be able to perform the following tasks manually:

- Select a personal greeting.
- Record a personal greeting.
- Listen to messages.
- Delete messages.
- Forward a message to another User.
- Send a message to another User.
- Setup pager notification.

## Final Cutover

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After Perfect Voice Strategy BSTU and the telephone system are fully configured and all parties are familiar with the system, the final cutover can be performed. During this step, CO line calls may be routed to Perfect Voice Strategy BSTU and User stations may be call-forwarded in a busy/ring-no-answer state to Perfect Voice Strategy BSTU.

Users' telephones should be forwarded to the Perfect Voice Strategy BSTU system for internal coverage on busy/ring-no-answer. Any internal User who calls an extension that is busy/ring-no-answer will be forwarded to that User's message box.

You should stay in close contact with the site during this crucial period so that anything that was overlooked during the installation can be quickly taken care of. The console operator is an especially good source of information about how the system is functioning and how well the caller community is accepting it.

## Troubleshooting

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### *Symptom: The auto-attendant will not answer*

#### ❖ Determine if there is a bad port:

From an internal station, call each port individually and note which one(s) are not answering.

- If no ports answer:
  - a) Verify the system has power and has booted
  - b) Verify the ports have a pulse. Each port should blink every five seconds when idle.
- If some ports do not answer, plug in a single line telephone (POTS) to the line(s) that do not answer and call them:
  - a) If the single line phone rings and is able to take the call, you have a bad port on Perfect Voice Strategy BSTU.
  - b) If the single line phone does not ring, you have a bad port on the switch.
- If all ports answer:
  - a) The hunt group is not working properly.
  - b) Users stations are not forwarded properly.
  - c) The trunks are not ringing into the Perfect Voice Strategy BSTU hunt group properly.
- If the last 2 ports do not answer:
  - a) Verify the system is a 4 port system.

### *Symptom: Pager notification is not functioning*

#### ❖ Verify the paging service is working:

The first and easiest thing to check is that the paging service is working properly. Simply dial the pager number and enter in several 9s because that is what the system is attempting to do.

#### ❖ Verify programming in the User ID having trouble:

When testing the User ID experiencing trouble, you always want to start with an empty mailbox. Delete all messages in the mailbox. Call back and leave the User a message.

- If the User ID does not give you the option to leave a message:
  - a) The User must go through quick setup, or
  - b) The mailbox is full, or
  - c) The system is full and unable to take anymore messages.
- If you are able to leave a message, log in to the User ID and verify the notify status:
  - a) Is Notification enabled for the User?
  - b) Is the notification number correct?
  - c) Make sure the notification number does not contain the 9 for outside line access.

#### ❖ Determine trunk access is working:

From Line 2 the system always dials 9 to gain trunk access. You must verify this is working properly. Using a single line telephone on Line 2, go off hook and dial 9:

- If no outside dialtone is detected:
  - a) The trunk access code programmed in the telephone system is something other than 9.
  - b) The extension Line 2 is plugged into has not been given trunk access privileges.
  - c) There is a problem with one or more of the trunks in the trunk group.
- If dialtone is detected:
  - a) Verify User setting (above).
  - b) Line 2 may be busy processing calls and has not been given enough time to seize the line and dial the pager.

***Symptom: Calls forwarded to voicemail go the main greeting rather than personal greeting***

- If the caller hears the main greeting:
  - a) Verify the User ID exists by trying to log in to it.
  - b) Verify the integration is being sent by listening on the line with a digit grabber or test set to determine the telephone system is sending the integration string (DTMF integration).
- If caller hears several rings followed by the main greeting on an SMDI configuration, SMDI link is not working:
  - a) Check Cabling.
  - b) Verify telephone system programming.
  - c) Re-select telephone system type (see “Select the Telephone System Type”).

***Symptom: The auto-attendant will not successfully transfer calls.***

- ❖ Determine if the telephone system is capable of transferring calls:  
Attempt the transfer with a single line phone on the same line the auto-attendant is using. Verify which port on the auto attendant is not transferring calls.
  - If the transfer works, there is a bad port on the system.
  - If the transfer does not work:
    - a) The port on the telephone system may not be configured to allow transfers.
    - b) The port on the telephone system may be bad.

Some telephone systems do not support station to station transfers. In this case, only outside callers can take advantage of the auto-attendant.

# System Administration

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## Before You Begin

As the System Administrator, you play a key role in the every day operation of Perfect Voice Strategy BSTU. It is important that you understand at least the basics of how Perfect Voice Strategy BSTU operates. You should be familiar with all features available to Users. Completely understand the *User Guide* before covering the material in this manual.

## Basic System Maintenance

As mentioned above, the System Administrator performs a key role in the operation of Perfect Voice Strategy BSTU. Following are some examples of your basic duties as a System Administrator.

- Record the main system greeting and whattodo.
- Record any audiotext announcement.
- Train Users.

These procedures along with many others that you may need to perform are documented in step-by-step detail later in this manual.

## Questions and Answers

As the System Administrator, you are responsible for answering questions from Users. You should have a relatively good working knowledge of how the system operates. You will also help new or inexperienced Users become accustomed to using the system. Even if you don't immediately have an answer to someone's question, you can easily get the answer from the Perfect Voice Strategy BSTU documentation, your vendor's technical personnel and your own experience with the system.

## User Training

Although Quick Setup takes most Users through the process of setting up their mailbox, all Users should be able to perform at least the following tasks in order to benefit from the system. As the System Administrator, you also need to be able to perform these tasks in order to best train your new personnel.

- Select a personal greeting.
- Record a personal greeting.
- Listen to messages.
- Delete messages.
- Forward a message to another User.
- Send a message to another User.

## Problem Reporting

In the event that a User or caller reports a problem with the system, you and/or the vendor's technical personnel work to determine the cause of, and solution to the problem. The cause of a problem may be one or more of the following.

- User error
- Insufficient training
- Incorrect system configuration
- Faulty hardware
- Faulty software

The System Administrator plays a central role in separating those issues that can be addressed within the organization (i.e. training, User error, etc.) and those issues that can be addressed by the vendor's technical personnel. Some problems, especially those experienced just after the system is installed, can only be resolved through cooperation between both parties, the vendor and your company.



# System Administrator Menu

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User ID 900 is the only User with administrative privileges. Below are the available options from the System Administrator menu:

**[1] Play the Current Date and Time**

This option plays the current date and time of the system.

**[2] Change System Time**

This option allows the System Administrator to change the time on the system.

**[3] Change System Date**

This option allows the System Administrator to change the system date.

**[4] Reset a Password**

This option allows the System Administrator to change a User's password to the default password.

**[5] Activate/Disable Users**

This option allows the System Administrator to disable a User from the dialplan or reactivate a disabled User.

**[6] Reset User ID**

This option enables the System Administrator to reset a User ID. The User's password, name, personal greetings, messages, and mailbox options will be reset.

**[7] Available Recording Space**

This option tells the System Administrator how much recording space is available.

**[8] Network Administration**

This option prompts the System Administrator to record names for AMIS network sites.

**[9] Return to User Menu**

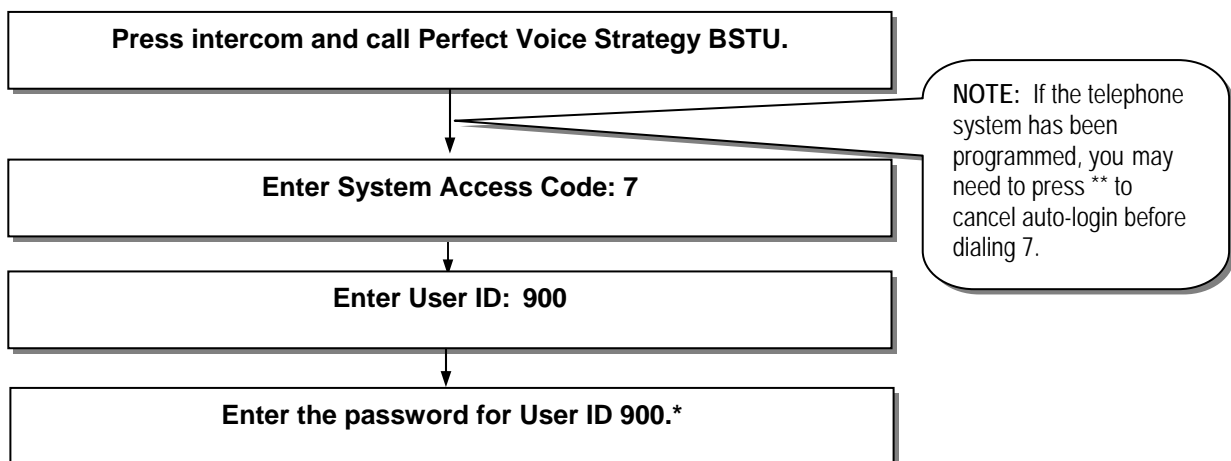
This option returns the System Administrator to the User menu.

**[0] Log Out**

This option logs the System Administrator out and returns him/her to the main system greeting.

**[\*] Replay Menu Options**

## To Access the System Administrator Menu



\*For security reasons, it is important to change the password. You may change the password in User Setup.

## Users on the Perfect Voice Strategy BSTU

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All Users must complete Quick Setup before they can receive messages. New messages will be purged after 2 weeks if not listened to. Saved messages will be purged 2 weeks after the day they were saved.

**NOTE:** Due to limited disk space, the maximum number of mailboxes allowed on the Perfect Voice Strategy BSTU system is approximately 300.

### Normal Users

The Normal Type of User is the most common type of User on the system. A User of this type is associated with each person in your company who has a physical extension number on your telephone system. That extension number directly corresponds to their User ID, or mailbox number, on the Perfect Voice Strategy BSTU system.

If your Perfect Voice Strategy BSTU system is a primary attendant, a caller hears your main company greeting and whattodo when the system answers. When a caller enters a User's extension number, Perfect Voice Strategy BSTU places the caller on hold and dials the User's extension number. Perfect Voice Strategy BSTU then listens for a ring signal. If the User does not answer the ringing phone, Perfect Voice Strategy BSTU returns to the caller and plays the User's personal greeting. The caller may then leave a message, enter another extension number, or press 0 to reach the operator.

If the caller chooses to leave a message, Perfect Voice Strategy BSTU records the message and turns the message light on at the User's extension. When a User accesses their mailbox, Perfect Voice Strategy BSTU turns the message light off on the extension. Below are the default settings for Normal Users. These settings may be changed using the SCREENS interface.

- 2 personal greetings, 20 seconds in length
- 40 messages at 40 seconds in length
- User mode starting menu is the Message Management Menu
- Pager notification and message waiting light

### Outside Users

The Outside Users are individuals in your company who do not have a physical extension number on the telephone system, but need voice messaging service. The Outside User boxes function just like those of the normal User. The only difference is that, since there is no telephone to transfer the caller to, Perfect Voice Strategy BSTU immediately plays the personal greeting for this type of mailbox as soon as the caller enters an Outside User ID.

Since Outside Users do not have physical extension numbers on the telephone system, it is their responsibility to check frequently for new messages. Below are the default settings for Outside Users. These settings may be changed using the SCREENS interface.

- 1 personal greeting, 20 seconds in length
- 40 messages at 40 seconds in length
- User mode starting menu is the Message Management Menu
- Pager notification

### Standard Audiotext Users

This type of User is not associated with a person. A caller who selects a User of this type is not transferred to an extension, nor is the caller allowed to leave a message for the User. Only a message plays, after which, the caller is placed back to the whattodo. The audiotext message may be changed at any time by simply re-recording the personal greeting for this User. The information recorded in the message could be your address, your fax number, your business hours or any type of information you would like callers to have. Below are the default settings for Standard Audiotext Users. These settings may be changed using the SCREENS interface.

- 1 personal greeting, 60 seconds in length
- No messages
- User mode starting menu is the Call Management Menu

## Single Digit Audiotext and Transfer-Only Users

This type of User is not associated with a person. Single Digit User IDs 1 through 6 may be set up to transfer callers to another extension (Transfer-Only) or play an audiotext message to callers (Audiotext). A Single Digit User ID may be set up to both transfer to an extension and play audiotext. However, only one of these functions will be active at a time, depending on the call blocking status of the User ID.

## Operator

The default Operator for Perfect Voice Strategy BSTU is User ID 0. Whether a caller dials zero or does not dial anything from the main greeting he or she is directed to the extension programmed for User ID 0. By default, the extension for User ID 0 is extension 0. The extension may be changed via the SCREENS interface.

## Auto-Detect Users

These types of Users are not associated with a person. They allow you to configure Perfect Voice Strategy BSTU to automatically transfer to a fax extension or TDD equipment when the appropriate tone is detected. Use the SCREENS interface to specify the extension(s).

## Public Distribution Lists

Perfect Voice Strategy BSTU automatically generates 3 public distribution lists:

1. User ID 950 includes all Normal and Outside Users
2. User ID 951 includes all Normal Users
3. User ID 952 includes all Outside Users

An additional 7 public distribution lists (User IDs 953-959) may be created.

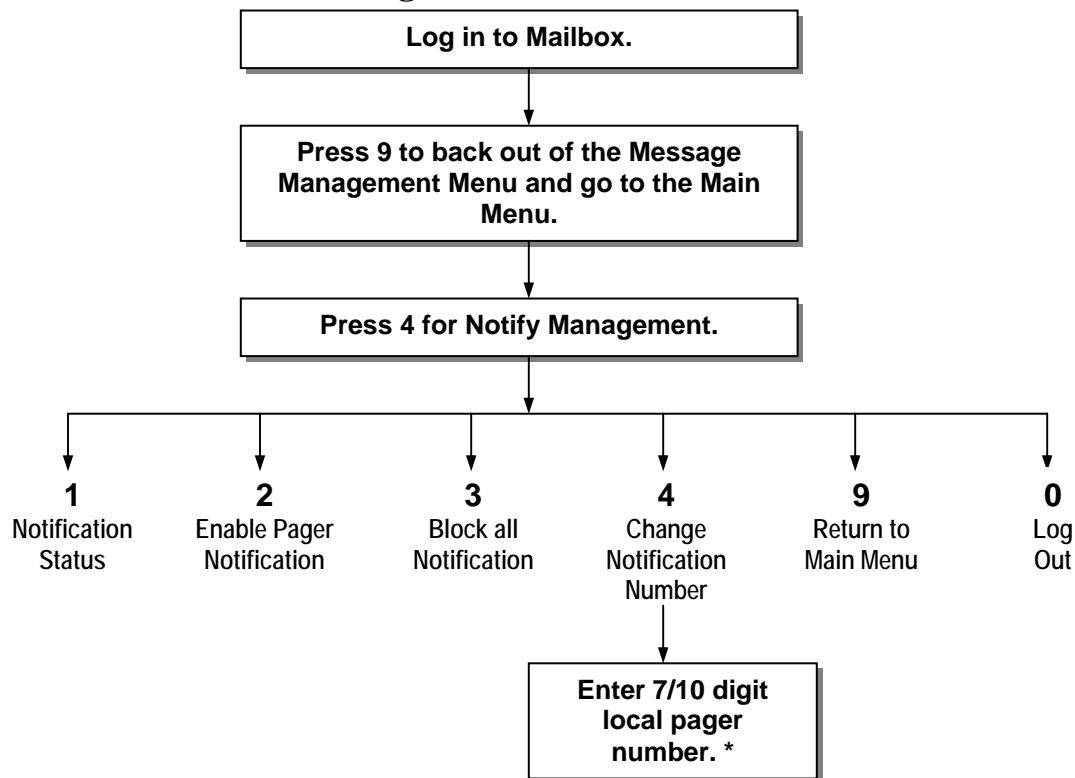
The table below lists the default settings for User mailboxes. You may change these settings in SCREENS.

User Type	Number of Personal Greetings	Personal Greeting Length	Max Messages	Message Length	Login Start Menu	Notification Type	Message Expiration
Normal	2	20 secs	40	40 secs	Message Mgt.	Light, Pager	Default
Outside	1	20 secs	40	40 secs	Message Mgt.	Pager Only	Default
Audiotext	1	60 secs	0	N/A	Call Mgt.	N/A	N/A
Single Digit	1	60 secs	0	N/A	Main Menu	N/A	N/A
Operator	2	20 secs	25	60 secs	Message	N/A	Default

## Activating Pager Notification

Pager notification may be activated for any User or Outside User ID on the Perfect Voice Strategy BSTU system. If pager notification is active, the User's pager is activated for every new message every day, twenty-four hours a day. The User may activate and deactivate pager notification from within their User mailbox. When the User receives a new message, 9's will appear on the pager display. This is the notification that there are messages in his or her Perfect Voice Strategy BSTU mailbox.

### To activate/deactivate Pager Notification:



**\*NOTE:** The pager number must be local. It is not necessary to place a 9 (Trunk Access Code) in the notification dialstring.

## Notification Cycle

Moments after a message is left, the pager is called. If the User does not call in to pick up the new message, the pager will be called approximately 10 minutes from the initial attempt. The delay between attempts increases the longer the message goes un-retrieved. The delay continues, adding 10 minutes to each attempt, not to exceed 1 hour between attempts. The table below contains an example of the paging cycle for an un-retrieved message left at 9:00 AM.

Attempt	Accumulated Delay	Example
First	No delay	9:00 AM
Second	10 Minutes	9:10 AM
Third	20 Minutes	9:30 AM
Fourth	30 Minutes	10:00 AM
Fifth	40 Minutes	10:40 AM
Sixth	50 Minutes	11:30 AM
Seventh	60 Minutes	12:30 PM
Eighth	60 Minutes	1:30 PM
Ninth	60 Minutes	2:30 PM
Tenth	60 Minutes	3:30 PM

**NOTE:** All notification attempt schedules reset upon receipt of each new message. For this reason if you receive a new message every 5 minutes, your pager will go off every 5 minutes for each new message.

# Recording System Greetings and Whattodos

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## System Greetings

Customized greeting and whattodo for open and closed mode operation should have been recorded during your installation process. The following information is offered for assistance should you wish to re-record the greeting and whattodo.

The first prompt a caller hears when reaching the Perfect Voice Strategy BSTU is the greeting. The open greeting is recorded in the personal greeting number 1 of User 980. The closed greeting is recorded in the personal greeting number 3 of User 980. This prompt is heard only once during a call. The greeting should welcome the caller and, like a human operator, confirm that the caller has reached the correct number.

*“Thank you for calling ABC Company.”*

The greeting should also contain any additional information the caller should hear only *once*.

*“Thank you for calling ABC Company. Our office is currently closed.”*

Immediately following the greeting, Perfect Voice Strategy BSTU plays the whattodo. The open whattodo is recorded in the personal greeting number 2 for User 980. The closed whattodo is recorded in the personal greeting number 4 of User 980. The whattodo informs the caller “what-to-do”, or gives the caller options.

*“If you know the extension number of the person you wish to reach, please enter it now. For directory assistance, press 9 or hold for assistance.”*

If single digit options are used, they should be included as part of the whattodo. There are several states during the duration of a call in which the caller is brought back to the whattodo.

- After leaving a message
- After entering an invalid selection or extension number
- After pressing 0 to exit from User mode
- After listening to an audiotext message

When writing the script for the whattodo, three things should be kept in mind:

1. The whattodo is played immediately after the greeting, so the transition between the greeting and whattodo should flow smoothly.
2. Callers may eventually come back to the whattodo, so the whattodo must make sense without being prefaced by the greeting.
3. It is tempting to offer the caller as many options as possible. However, most callers only want one thing. That is to *talk* to someone. Give the caller no more than three or four options in the whattodo.

Refer to the System Greeting Scripts worksheet to record the greeting and whattodo for both open and closed modes. All recordings should be made from a quiet environment.

## System Greeting Scripts

Description	Written Script
Open greeting (980-Greeting 1)	
Open whattodo (980-Greeting 2)	

Closed greeting (980-Greeting 3)	
Closed whattodo (980-Greeting 4)	

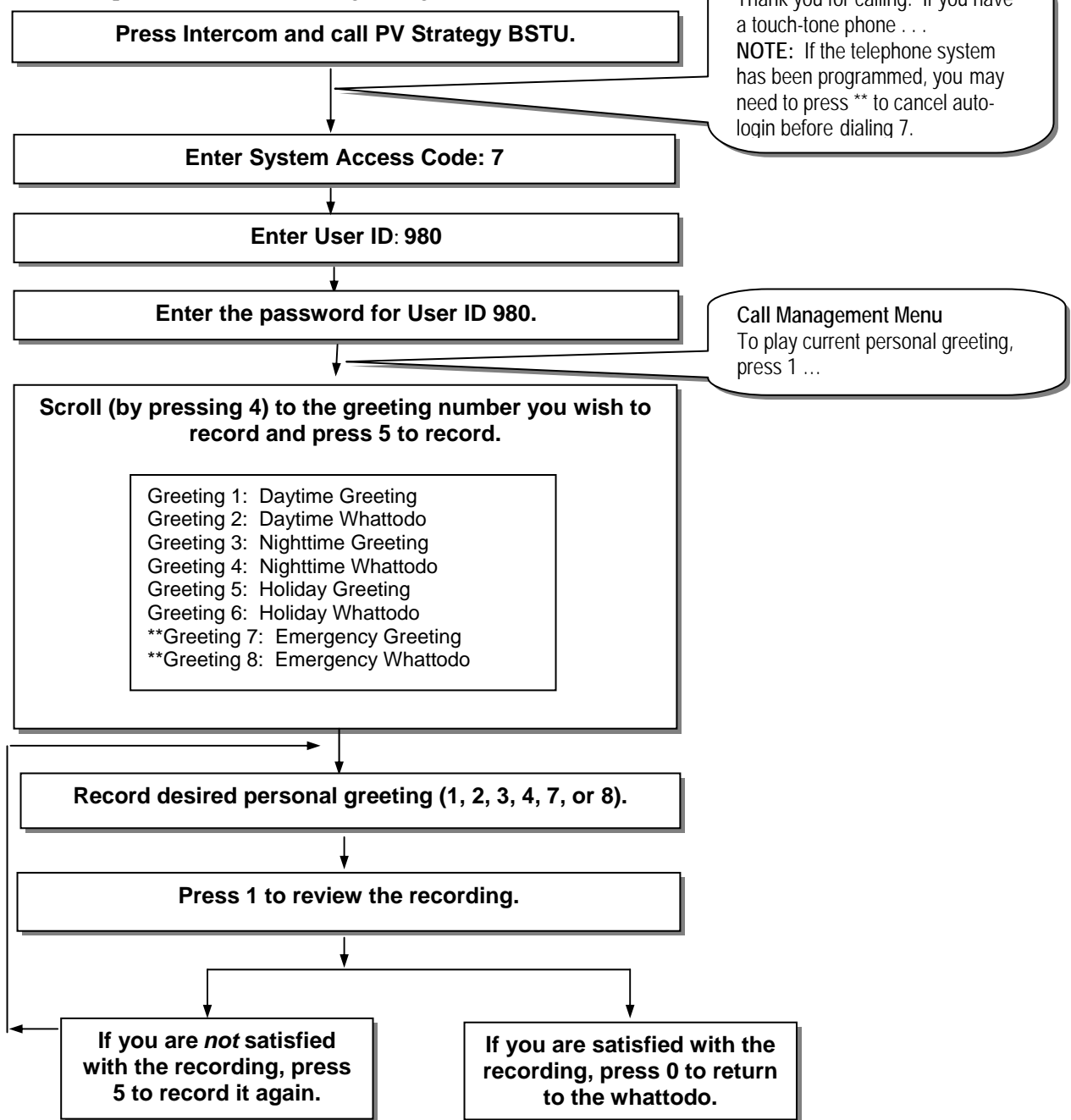
## Pre-Defined Users For Greetings and Whattodos

All greetings and whattodos (daytime, nighttime, and emergency/temporary) are recorded from one User ID – User ID 980. The greetings and whattodos are recorded as individual greetings (UV1-UV4 and UV7-UV8) for this User.

- Greeting 1 (UV1): Daytime Greeting
- Greeting 2 (UV2): Daytime Whattodo
- Greeting 3 (UV3): Nighttime Greeting
- Greeting 4 (UV4): Nighttime Whattodo
- Greeting 5 (UV5): Holiday Greeting
- Greeting 6 (UV6): Holiday Whattodo
- Greeting 7 (UV7): Emergency Greeting
- Greeting 8 (UV8): Emergency Whattodo

## Recording System Greetings

The process of recording of the greeting and whattodo for open, closed or holiday mode is the same as recording a personal greeting in a mailbox, only the User ID and password are different. All greeting and whattodo messages (daytime, nighttime, and emergency) for the main company may be recorded in User ID 980. Follow this procedure to record the greetings.



**NOTE:** To activate a new open greeting and whattodo or holiday greeting, see “Manually selecting Open and Closed mode”.

**\*\*Greetings 7 and 8 will immediately override the current greeting until the next change from day or night. This change may be done manually or scheduled.**



## Holiday and Temporary Greetings and Whattodos

### ***Holiday Greeting and Whattodo***

The system allows you to play a different greeting during a holiday. Holiday greetings become active when you place the system in “Holiday” mode. The holiday recordings will play until you place the system in “Workday” mode. (See “Manually Select Open or Closed Mode”.)

Holiday greetings and whattodos are recorded in User ID 980:

- **User 980 – Greeting 5: Holiday Greeting**
- **User 980 – Greeting 6: Holiday Whattodo**

### ***Temporary Greeting and Whattodo***

A Temporary greeting and whattodo is typically used if your company is closed due to inclement weather or a some other reason. These recordings should explain when you will be back in operation and what options the caller has at that time.

Temporary greetings become active as soon as you record them. These new recordings will play until the next scheduled greeting change occurs. For example, if you plan to be closed on a Thursday, record your temporary greeting just after the Thursday “open” greeting has loaded. Perfect Voice Strategy BSTU will play the temporary greeting/whattodo during the open hours. Perfect Voice Strategy BSTU will automatically switch to the closed greeting after hours and play the regular open greeting on Friday.

Temporary greetings and whattodos are recorded in User ID 980:

- **User 980 – Greeting 7: Temporary Greeting**
- **User 980 – Greeting 8: Temporary Whattodo**

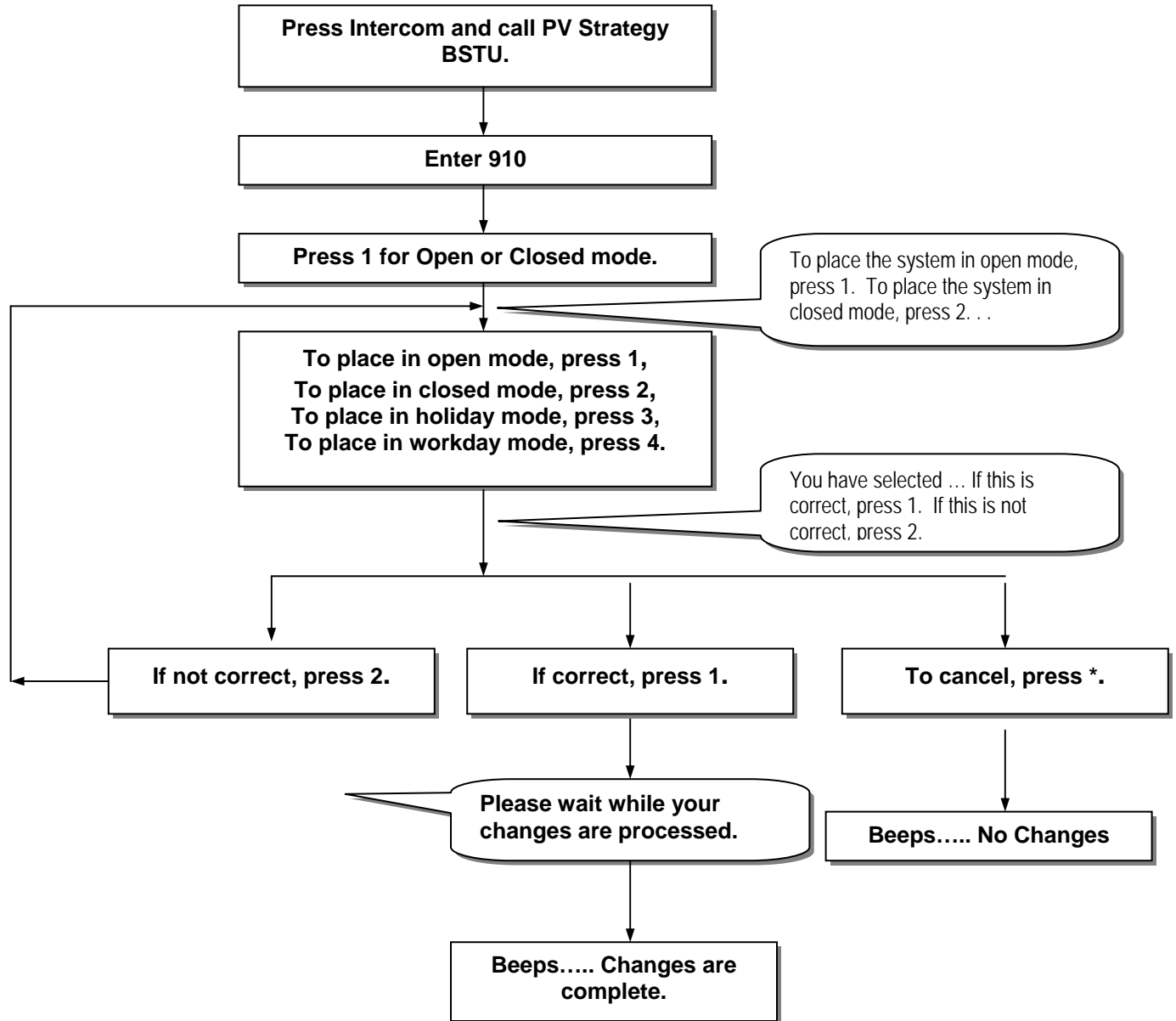
If the system does not have an open/closed schedule, you may record a temporary greeting and whattodo in User ID 980 – Greetings 3 and 4. Manually toggle the system from open to closed mode as needed. (See “Manually Select Open or Closed Mode”.)

### ***Recording Greetings and Whattodos***

Refer to “Recording System Greetings and Whattodos” for clarification of “greeting” and “whattodo” and instructions on how to record them. Keep in mind you may only want to change the greeting *or* the whattodo, it is not necessary to change both.

## Manually Select the Open or Closed Mode

Once the greeting and whattodo for open, closed, or holiday mode have been recorded, the new recordings may be activated immediately using the following procedure for manually selecting open, closed, holiday, or workday mode. Otherwise, the new recordings will play at their regularly scheduled time.



NOTE: Changes will not become active until the next call into the system. Please hang up and call back into the system to verify changes.

## Single Digit Audiotext Messages

The following are tips to assist in setting up and recording Single Digit Audiotext messages and to re-record any message.

- Each Single Digit audiotext recorded message is to give the caller a bit of information about your company
- Write the audiotext message script using the following worksheet
- Secure someone to record the messages using a quiet environment
- Follow the steps for recording the audiotext message

### Audiotext Scripts

Instance	User ID	Description
0		
Script		<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Instance	User ID	Description
0		
Script		<hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

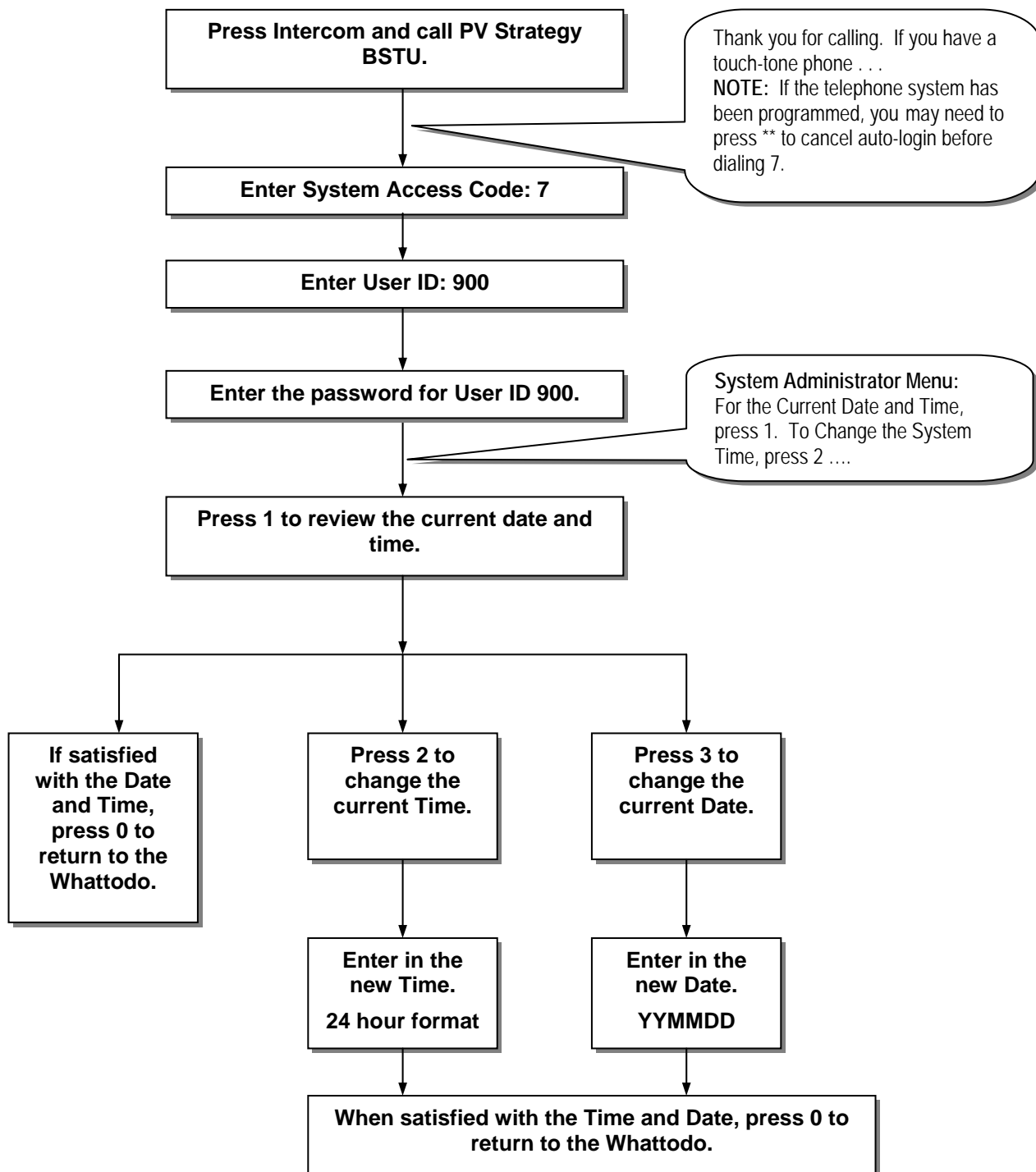
### Recording Audiotext Scripts

To record Single Digit Options or standard audiotext Users, follow the steps above for recording the greeting and whattodo. Substitute the Single Digit User ID or Standard User ID for the User ID in the steps above. Again, by default, the password for these Users is the same as the User ID.

## Change the System Date and Time

If necessary, you may adjust the date and time on the Perfect Voice Strategy BSTU system by using the following procedure. You must change the system date and time when the system has been reset. If the date and time have not been set, the following message plays: “The current system date is invalid.”

### To Change the System Date & System Time:



## Using and Configuring the Default Operator

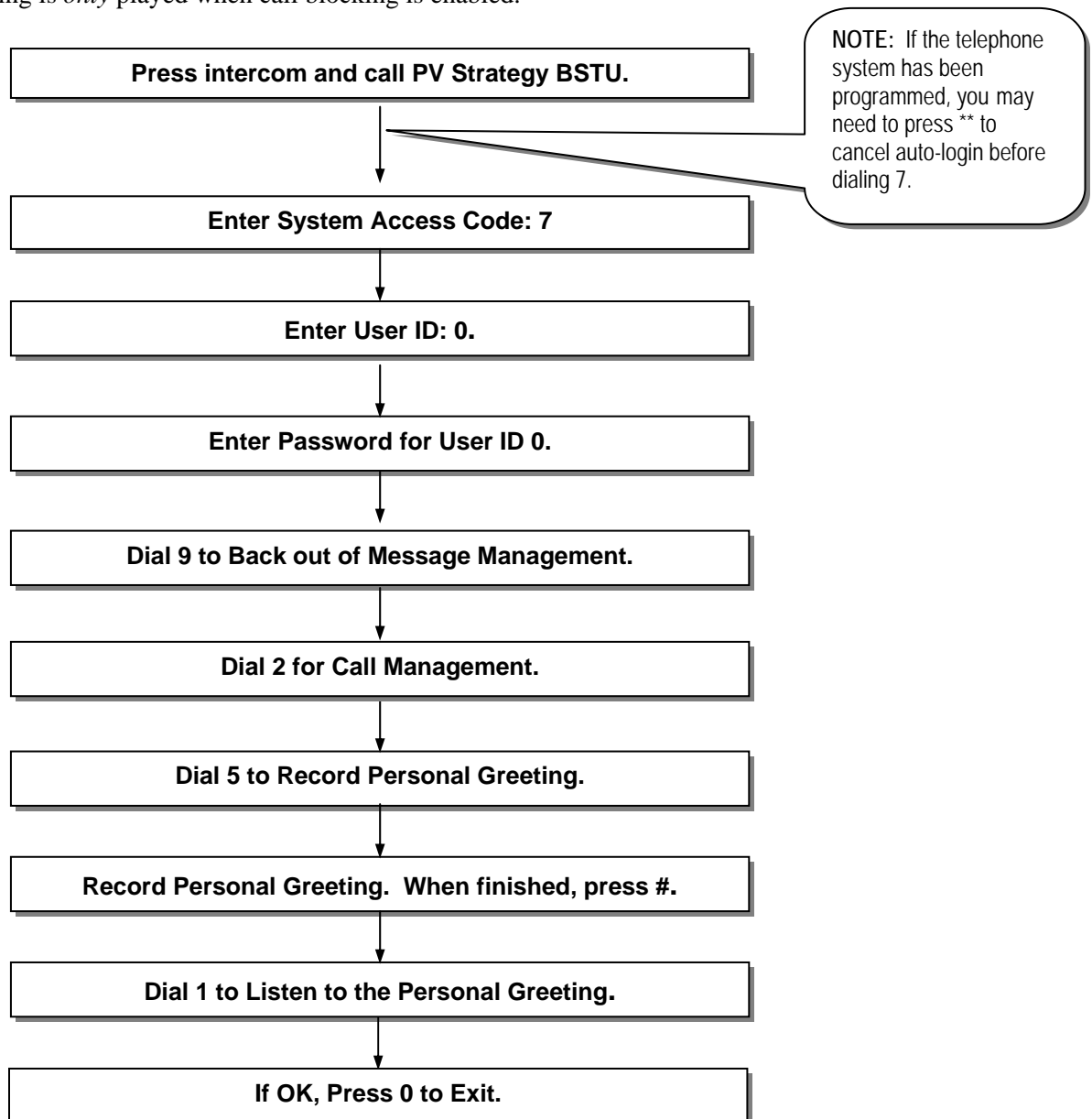
The default Operator for Perfect Voice Strategy BSLU is User ID 0. Whether a caller dials 0 or does not dial anything from the main greeting he or she is directed to the operator. Perfect Voice Strategy BSLU is pre-programmed with the extension 0 for User ID 0. The extension may be changed in the SCREENS interface.

You may choose to customize the installation by enabling off-hours messaging for the default operator. There are two steps involved in enabling messaging for the Default User:

1. Recording a personal greeting
2. Enabling call blocking.

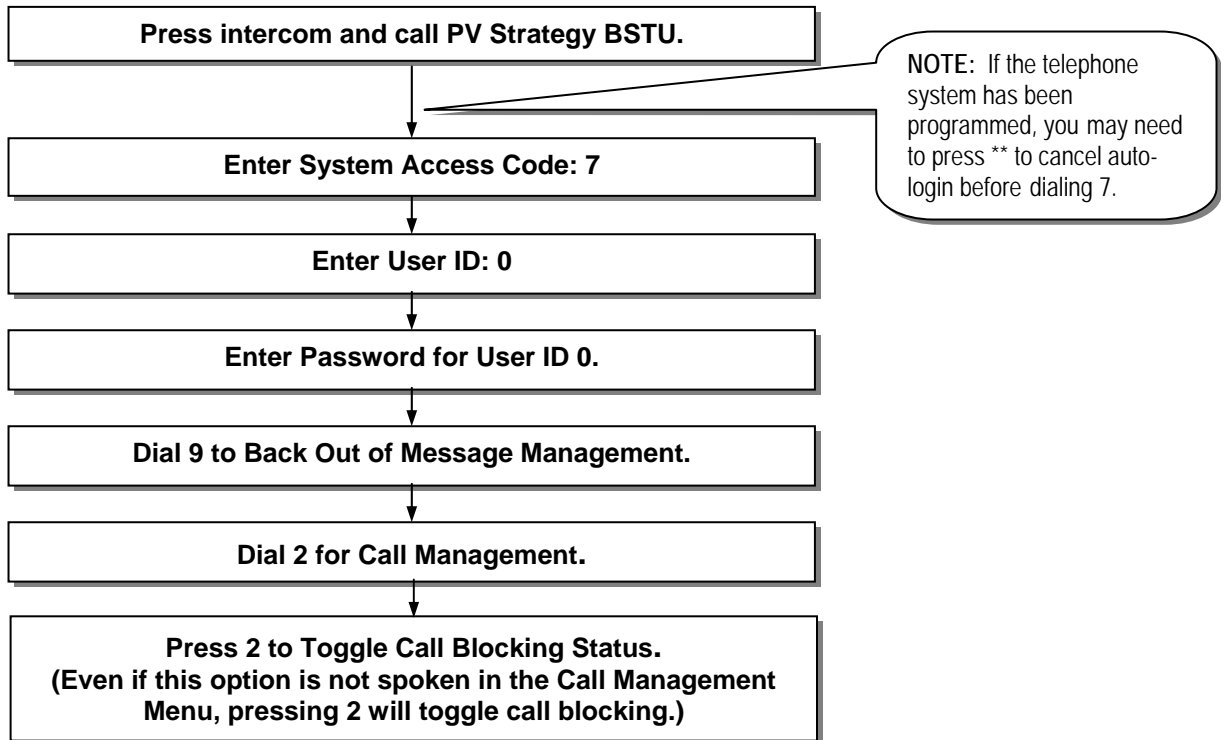
### Recording a Personal Greeting for the Default User's Mailbox

The personal greeting for the Default Operator should explain to the caller that they are in a general delivery mailbox and that they should leave their name, company name, callback number and whom they are calling. This greeting is *only* played when call blocking is enabled.



## Enabling / De-Activating Operator Personal Greeting

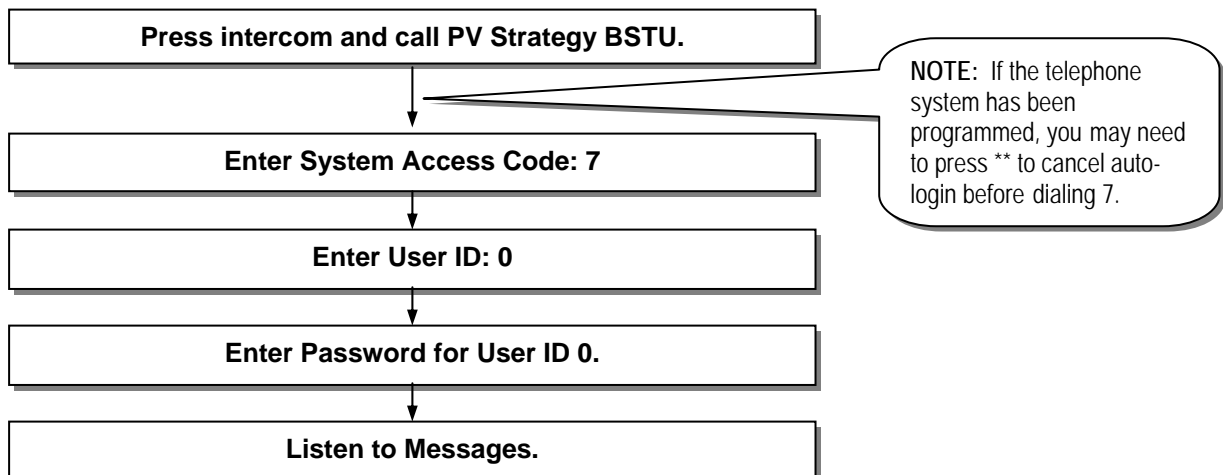
The operator manually enables call blocking when no one is able to take calls at the operator position.



A common scenario is for the operator to turn call blocking on at night, disabling transfers to the operator's extension and allowing the caller to leave a message in the operator's mailbox. It is the operator's responsibility to disable call blocking during business hours so that callers may get through to a live person.

## Retrieving messages From the Default Operator's Mailbox.

If call blocking has been enabled for User ID 0, messages will begin to accumulate in this box. It is the operator's responsibility to pick up these messages.



## Public Distribution Lists

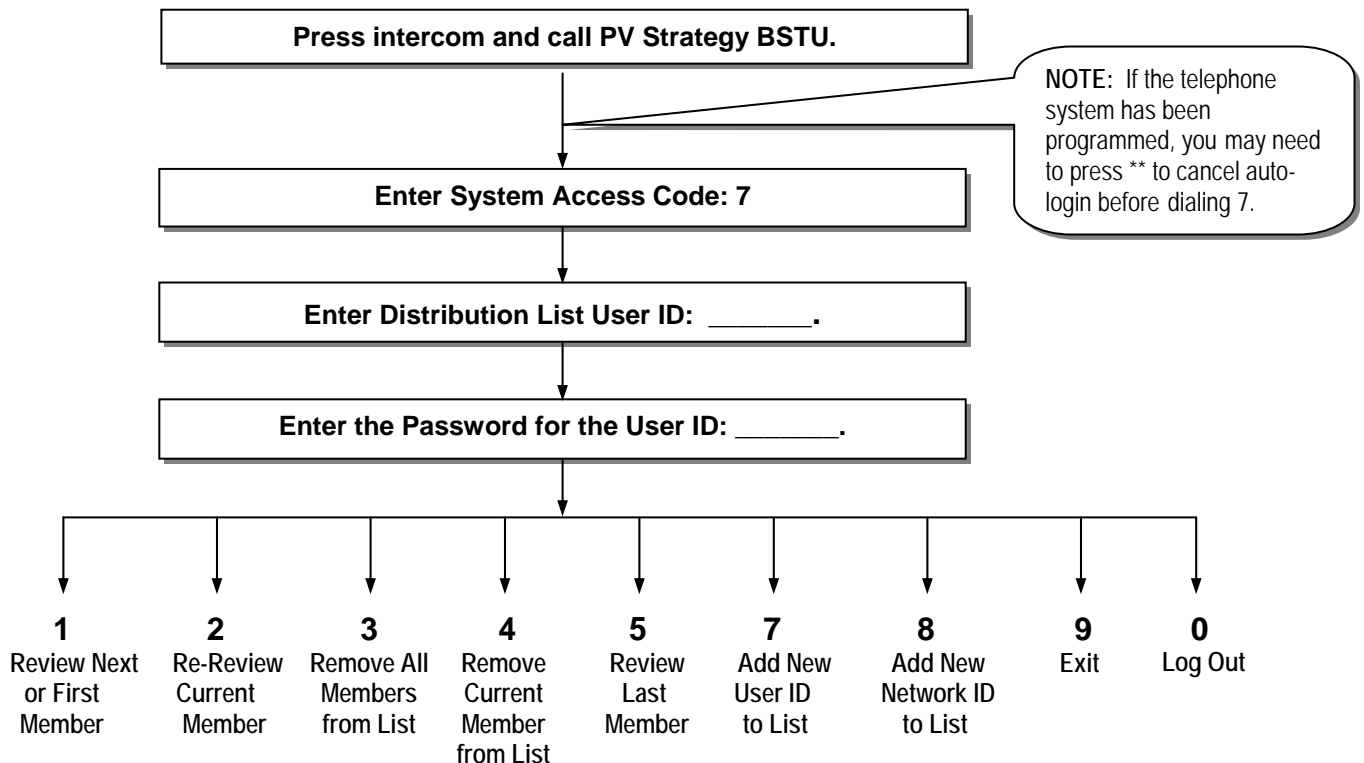
Perfect Voice Strategy BSTU automatically generates 3 public distribution lists:

1. User ID 950 includes all Normal and Outside Users
2. User ID 951 includes all Normal Users
3. User ID 952 includes all Outside Users

The System Administrator maintains these lists. You may create up to 7 additional public distribution lists (User IDs 953-959) and record names for each list.

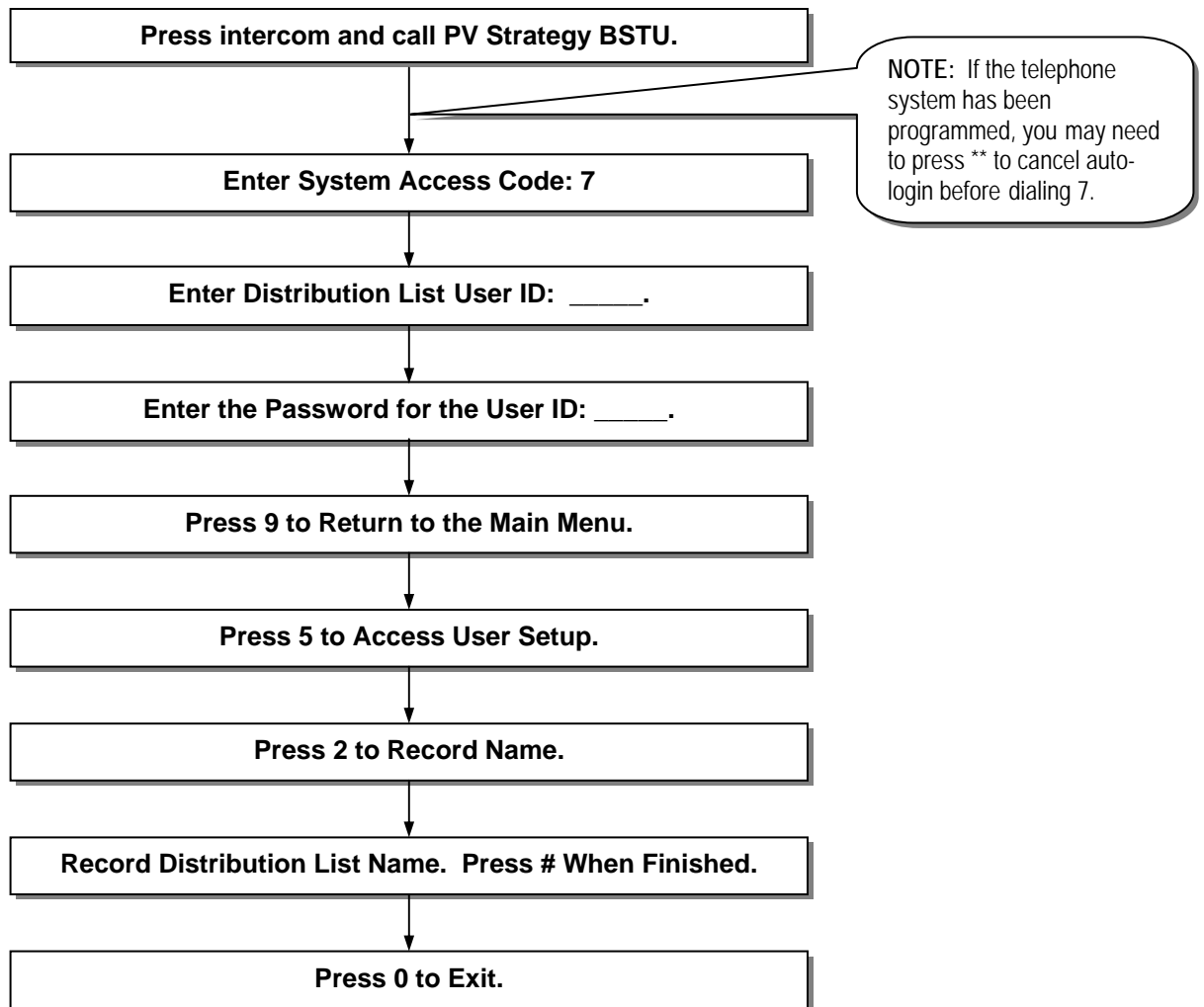
### Maintaining or Creating New Public Distribution Lists

You may review list members, remove members from the distribution list, or add new Users to the distribution list.



## Recording Public Distribution List Names

You may record a name for each public distribution list.

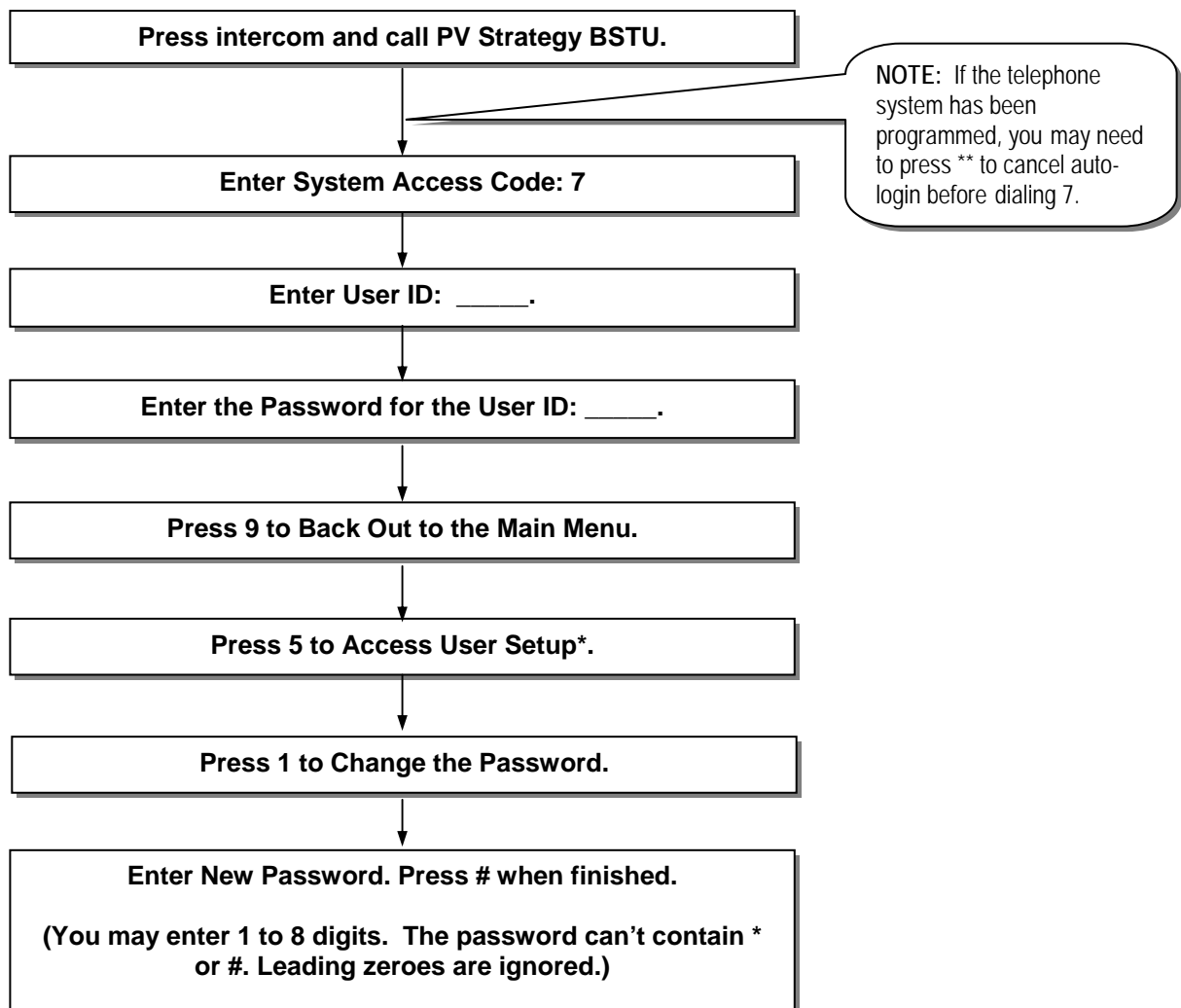




## Changing User Passwords

As the administrator of the system, you are responsible for the safe keeping of several User IDs. When the system is installed, all passwords are the same as their corresponding User IDs. If security is an issue, it is the System Administrator's responsibility to change passwords to the following User IDs.

User IDs	Description
0	Default Operator
1 – 6	Single Digit Users
900	Administrator
980	Open and Close Greeting Recording
950 – 959	Public Distribution Lists Maintenance



## Music on Hold and Background Music

The Perfect Voice Strategy BSTU system has two line-level “RCA” audio jacks (labeled BGM and MOH) to provide music/message-on-hold and/or background music. At system boot-up, the driver (**C:\AUDIO\MARSLIB.EXE**) looks for specific files in the **D:\MESG** folder. If they exist, audio output will be enabled. Generic audio files are located at **C:\AUDIO**, which can be copied to one or both of the following locations: **D:\MESG\BGM.RMS** (the file for the BGM port (Strategy BSTU with BGM/MOH only)) and **D:\MESG\MOH.RMS** (file for the MOH port).

### Hardware Requirements

- A three-foot male-to-male RCA/phono cable is provided with this system to connect from the MOH or BGM port on the Strategy BSTU to the MOH port on the CIX/CTX. If you need a longer cable, a six-foot cable may be purchased online.

#### NOTE - International User Only

Any external source connected to the Music on Hold (MOH) port must be isolated using an authorized and approved Line Isolation Unit (LIU).

### Enable Music on Hold/Background Music

**NOTE:** The Perfect Voice Strategy BSTU hardware was recently updated to support 16-kHz sampled audio. The new systems are distinguishable by the inclusion of a RESET button and LED indicators on the LAN interface. Please read the next section carefully.

There are two generic MOH/BGM audio files included with the system. They are in the C:\AUDIO directory:

- C:\AUDIO\MOH16.RMS is for the newest hardware that supports 16-kHz sampled audio playback. It is to be used on new hardware only; using it on the older hardware will cause it to play at half-speed.
- C:\AUDIO\MOH.RMS is for the original hardware that supports 8-kHz sampled audio playback. It is to be used on old hardware only; using it on the new hardware will cause it to play at double-speed.
- No harm will come to the system if the wrong file is used. If the playback sounds incorrect, try the other file.

#### To enable Music on Hold/Background Music:

- Use the command **TDLIB /TH-** to stop the BGM and MOH output. **NOTE:** It is important to stop the BGM/MOH output before changing the file(s). Failure to do so may cause the system to become unstable and halt operation.
- **Music on Hold:** At the DOS prompt, type:
  - **COPY C:\AUDIO\MOH16.RMS D:\MESG\MOH.RMS**
  - **- or -**
  - **COPY C:\AUDIO\MOH.RMS D:\MESG\MOH.RMS**
- **Background Music:** If the hardware supports both MOH and BGM, at the DOS prompt, type:
  - **COPY C:\AUDIO\MOH16.RMS D:\MESG\BGM.RMS**
  - **- or -**
  - **COPY C:\AUDIO\MOH.RMS D:\MESG\BGM.RMS**

**NOTE:** Copy the file to BGM.RMS only if the hardware supports both MOH and BGM. Copying the file on non-supporting hardware may cause the system to lockup.
- Perform a warm boot or use **TDLIB /TH** to re-start the BGM and MOH output.

## Disable Music on Hold/Background Music

- Use the command **TDLIB /TH-** to stop the BGM and MOH output. **NOTE:** It is important to stop the BGM/MOH output before changing the file(s). Failure to do so may cause the system to become unstable and halt operation.
- **Music on Hold:** At the DOS prompt, type: **DEL D:\MESG\MOH.RMS**
- **Background Music:** At the DOS prompt, type: **DEL D:\MESG\BGM.RMS**
- Perform a warm boot or use **TDLIB /TH** to re-start the BGM and MOH output..

## Customizing Music on Hold/Background Music

If you would like to use your own custom recording for music on hold, please contact technical support for help with conversion into the proper format for Strategy BSTU. Please be sure to let them know which hardware version you have. If you are not sure which version of hardware you have, technical support will be able to assist you.

## Changing the File After the System has Started

To change the file *after* the system has started, use the following procedure:

- Use the command **TDLIB /TH-** to stop the BGM and MOH output. **NOTE:** It is important to stop the BGM/MOH output before changing the file(s). Failure to do so may cause the system to become unstable and halt operation.
- Copy the new file to the proper location given above.
- Use **TDLIB /TH** to re-start the BGM and MOH output.

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### **Using Network Connection for File Transfers**

When using the console port or modem, File Transfers were performed using ZSEND (to transfer files from the voice-mail) and ZRCV (to transfer files to the voice-mail). These commands, which are actually batch files, use a program called FTRANS. This program relies on a background process called KLINIC, which provides access to the internal DSP modem and, after you type HELLO, to the console port.

RCS does not provide KLINIC the ability to access the Network Interface; therefore, FTRANS cannot perform transfers over that connection. Any attempt to use FTRANS would try to use the console port or modem, if they are active. But when the full-time network connection is enabled, File Transfers can be handled via FTP. This has a tremendous speed advantage over the console port and modem connections.

RCS is not required to perform FTP transfers. As long as the full-time network connection is present, FTP transfers can be initiated using the console port or modem connection. If you do use RCS to initiate the FTP transfer, you are encouraged to disconnect RCS for the duration that FTP is running. An active RCS connection may have a negative impact on the speed of FTP transfers; however, it will still be much faster than transfers performed over the console port or modem connection.

A small FTP server program (C:\TCPIP\FTPD.EXE) is used for file transfers. FTPD will root to the drive that it was executed from. It does not matter what directory or folder you are in, FTPD will always root itself to the root of that drive. Before running FTPD, you should run DHCPSTAT to find the IP address of the voice-mail system. You also need to remove AFORMS to ensure there is enough memory.

Example: If you need to transfer files from anywhere on the “D:” drive:

```
D:\>DHCPSTAT
D:\>AFORMEXT          ...or...
D:\>FTPD              D:\MESG>DHCPSTAT
                      D:\MESG>AFORMEXT
                      D:\MESG>FTPD
```

Use Internet Explorer or any other FTP software to connect to the voice-mail’s IP address. The default username is ‘admin’ and the default password is ‘admin’ (both are all lower-case). These can be changed in the file C:\TCPIP\SOCKET.UPW on the voice-mail system.

When you are done with your file transfer(s), use the connection to the voice-mail system (RCS, console port, or modem) to press any key for the FTPD command menu:

```
C close LISTEN
D Dos shell
S status
X exit
```

Choose X to exit, you may see:

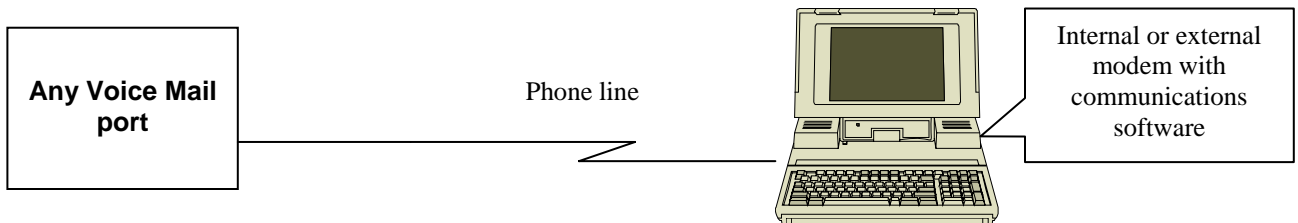
```
Active sessions
Press Ctrl A to abort them, any other key to continue...
```

Press CTRL-A to exit and then reload AFORMS (example, D:\>AFORMS).

## Connecting via Internal Modem

When the Perfect Voice Strategy BSTU boots, by default, the internal modem is initialized and the CONSOLE port (COM 2) is active and set at 57600 baud. Remote programming and maintenance can be accomplished by connecting to the internal modem. Call any Voice Mail port and after it answers, **dial ###**.

### Remote Connection Diagram



### Accessing SCREENS

1. Call any Voice Mail port and after it answers, **dial ###** to turn any port into a modem. Once a connection has been established to the system, a password prompt is displayed on the screen. (Making a remote modem connection while the e-mail process (EMAIL.BAT) is running will not immediately give the PASSWORD prompt. Allow time for the e-mail process to finish and the PASSWORD prompt will appear. The modem will stay connected during the wait. Depending on how many messages need to be sent, wait time may exceed several minutes.)
2. Type **CALLHELP** at the password prompt. (If the password prompt is not displayed, you should reset the modem. See "Resetting or Initializing the Internal Modem on the Perfect Voice Strategy BSTU" on page A-5. Upon successful entry of the password the DOS prompt displays with the instructions "To enter Advanced Menu type: SCREENS".

To enter Advanced Menu type: SCREENS.  
C:\>

3. Type **SCREENS** at the DOS prompt to launch the SCREENS programming interface. **For further details on the SCREENS interface please refer to the *System Configuration* section of the Perfect Voice Installation and Maintenance manual.** If DOS programming is required, proceed without typing SCREENS (please refer to the *Advanced Administration* section of the Perfect Voice Installation and Maintenance manual for further details).

## Using Klinik

Connecting to a remote site running the Klinik software allows for total emulation of the host keyboard.

To emulate the Function key strokes on the host computer, extended keys must be setup on the remote PC. All extended keystrokes, including the Control and Alt and Shifted versions of most keys can be executed on the remote system by entering special sequences of standard ASCII characters. This sequence always begins with an opening curly brace "{" and ends with a closing curly brace "}". For example, to enter a PageDown on the remote system, enter {PGDN}. Upon receipt of the closing curly brace, Klinik "presses" the appropriate key on the remote system.

The Control version of keys is created by simply adding a "C" at the beginning of the command. Therefore, Control-PageDown would be entered as {CPGDN}. Likewise the Alt and Shift versions can be created by adding an **A** or **S** to the command.

The following table lists the key codes available through Klinik. As mentioned above, adding a C, A or S to the beginning of these codes causes the Control-ed, Alt-ed, and Shifted versions of these keys to be pressed. The codes are not case-sensitive.

If you key in this locally...	Klinik "presses" this key on the remote system.
{F1}	F1
{F2}	F2
{F3}	F3
{F4}	F4
{F5}	F5
{F6}	F6
{F7}	F7
{F8}	F8
{F9}	F9
{F10}	F10

If you key in this locally...	Klinik "presses" this key on the remote system.
{F11}	F11
{F12}	F12
{PGUP}	PageUp
{PGDN}	PageDown
{HOME}	Home
{END}	End
{INS}	Insert
{DEL}	Delete
{BREAK}	Break

Sometimes the remote system appears to stop accepting keystrokes. This could be due to a high system load or a noisy line. For the latter case, noise that looked like an opening brace character was received. To get around this, press the closing brace character a few times until you see it echoed on the local screen. This terminates whatever accidental extended key sequence was in progress. If the problem persists, try calling back into the system on another line or at a lower baud rate.



## File Transfers

Two programs that use the ZMODEM file transfer protocol are supplied with Perfect Voice Strategy BSTU to enable the transfer of files between the local PC and remote Perfect Voice Strategy BSTU system.

<b>ZSEND</b>	Initiate a ZMODEM file transfer to send a file from the Perfect Voice Strategy BSTU system to the local PC.
<b>ZRCV</b>	Initiate a ZMODEM file transfer to receive a file from the local PC to the Perfect Voice Strategy BSTU system.

To transfer a file, run the appropriate program by keying in the command from the Perfect Voice Strategy BSTU system DOS system prompt, supplying the name of the file to send/receive as the only command line argument. After keying in the "Z..." command on the Perfect Voice Strategy BSTU system, initiate the download/upload procedure in the communications software on the local PC.

## Resetting or Initializing the Internal Modem on the Perfect Voice Strategy BSTU

To reset or initialize a modem on the Perfect Voice Strategy BSTU, first dial the system. From the list below, dial the appropriate code, followed by the confirmation code (the codes are the same). You will hear "Please wait.... beep..beep..beep" followed by the Whattodo. Hang up at this time.

Code	Modem	Confirmation Code
970	Local Connection on COM 2 at 9600	970
971	Local Connection on COM 2 at 57600	971
972	Hayes 14400 fixed – internal modem (COM 3)	972
973	Local Connection on COM 2 at 19200	973
974	Local Connection on COM 2 at 38400	974
975	Local Connection on COM 2 at 115000	975
976	Hayes modem on COM 2 at 9600	976
977	Not used	Not used
978	Start SMDI on COM 1 <b>NOTE:</b> Perfect Voice Strategy BSTU reboots after selecting this option.	978 <b>NOTE:</b> After entering the confirmation code, you will hear beeps. <u>You must hang up when you hear the beeps or the process will not be completed.</u>
979	Disable SMDI <b>NOTE:</b> Perfect Voice Strategy BSTU reboots after selecting this option.	979 <b>NOTE:</b> After entering the confirmation code, you will hear beeps. <u>You must hang up when you hear the beeps or the process will not be completed.</u>

## Connecting Locally via Console Port

When the Perfect Voice Strategy BSTU boots, by default, the internal modem is initialized and the CONSOLE port (COM 2) is active and set at 57600 baud.

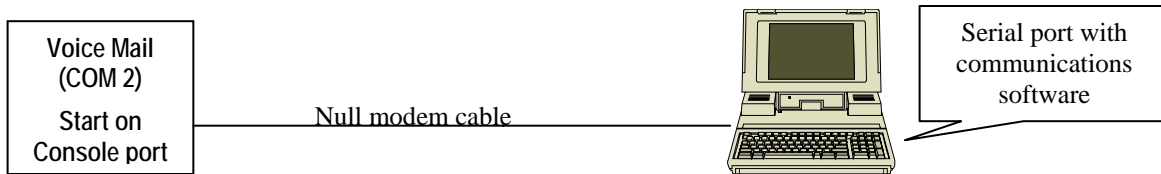
Local programming and maintenance can be accomplished by connecting a laptop/PC to the CONSOLE PORT (COM 2) of the voice mail system and typing in HELLO.

### NOTE

Typing HELLO puts the Scheduler on HOLD until you type BYE. (The Scheduler is disabled while online so the system will work in conjunction with AGM.) Scheduled events will NOT run as long as you are in the “Hello” mode. **Be sure that you type BYE when you have finished programming/maintenance.**

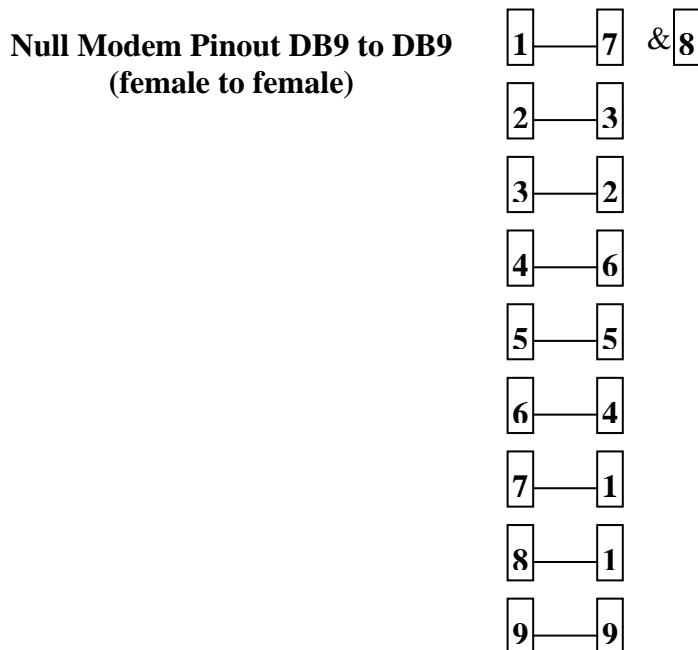
The basic materials required for the local connection are a laptop/PC and a standard 9 to 9 null modem cable. **NOTE:** You cannot use the CONSOLE PORT (COM 2) and modem (COM 3) for Klinik/Admin connection at the same time.

### Local Connection Diagram



The system is equipped with a serial port to act as the programming port when the SCREENS programming interface is required. When the system is booted-up, it will be configured for a modem connection at 9600bps/None/8/1. In order to connect a device such as a laptop or PC equivalent, communication software with the settings of 9600bps/None/8/1 is required with a null modem cable to serve as the link between the two machines. A straight through cable with a null modem adapter can serve as a substitute if a null modem cable cannot be obtained.

The serial port is a standard 9 pin male RS232 connection therefore requires the null modem cable to be a 9pin female. The other end of the cable depends on the serial port of the programming terminal (most serial ports equipped on personal computers are 9 pin males). If a custom cable is required or cross connections must be used please refer to the following diagram for assembly instructions.



## Accessing SCREENS

\*\*\*\*\* You must type HELLO to access from COM 2 \*\*\*\*\*

### To connect locally with your PC on COM 2:

1. Type **HELLO** while connected to the CONSOLE port. (The port is kept at 57600 baud.)

#### NOTE

**To restore internal modem access and restart Scheduler, be sure to type BYE upon ending your local COM 2 session.**

## System Boot Options

When the system is first booted, the following options are available from a menu. If no selection is made, the system defaults to option number 3.

Option	Menu Selection Action	Voice Mail State
1	Local Connection on COM 2 at 9600	Active
2	Local Connection on COM 2 at 57600	Active
3	Internal DSP Modem on COM 3	Active
4	Update on COM 2 at 9600	Inactive
5	Update on COM 2 at 38400	Inactive
6	Update on COM 2 at 57600	Inactive
7	Update on COM 2 at 115000	Inactive
8	No KLINIC – Console port only	Console port only/Inactive
9	No Autoexec – Console port only	Console port only/Inactive

## Using Klinik

Connecting to a remote site running the Klinik software allows for total emulation of the host keyboard.

To emulate the Function key strokes on the host computer, extended keys must be setup on the remote PC. All extended keystrokes, including the Control and Alt and Shifted versions of most keys can be executed on the remote system by entering special sequences of standard ASCII characters. This sequence always begins with an opening curly brace “{” and ends with a closing curly brace “}”. For example, to enter a PageDown on the remote system, enter {PGDN}. Upon receipt of the closing curly brace, Klinik “presses” the appropriate key on the remote system.

The Control version of keys is created by simply adding a “C” at the beginning of the command. Therefore, Control-PageDown would be entered as {CPGDN}. Likewise the Alt and Shift versions can be created by adding an **A** or **S** to the command.

The following table lists the key codes available through Klinik. As mentioned above, adding a C, A or S to the beginning of these codes causes the Control-ed, Alt-ed, and Shifted versions of these keys to be pressed. The codes are not case-sensitive.

If you key in this locally...	Klinik “presses” this key on the remote system.
{F1}	F1
{F2}	F2
{F3}	F3
{F4}	F4
{F5}	F5
{F6}	F6
{F7}	F7
{F8}	F8
{F9}	F9
{F10}	F10

If you key in this locally...	Klinik “presses” this key on the remote system.
{F11}	F11
{F12}	F12
{PGUP}	PageUp
{PGDN}	PageDown
{HOME}	Home
{END}	End
{INS}	Insert
{DEL}	Delete
{BREAK}	Break

Sometimes the remote system appears to stop accepting keystrokes. This could be due to a high system load or a noisy line. For the latter case, noise that looked like an opening brace character was received. To get around this, press the closing brace character a few times until you see it echoed on the local screen. This terminates whatever accidental extended key sequence was in progress. If the problem persists, try calling back into the system on another line or at a lower baud rate.

## ***File Transfers***

Two programs that use the ZMODEM file transfer protocol are supplied with Perfect Voice Strategy BSTU to enable the transfer of files between the local PC and remote Perfect Voice Strategy BSTU system.

<b>ZSEND</b>	Initiate a ZMODEM file transfer to send a file from the Perfect Voice Strategy BSTU system to the local PC.
<b>ZRCV</b>	Initiate a ZMODEM file transfer to receive a file from the local PC to the Perfect Voice Strategy BSTU system.

To transfer a file, run the appropriate program by keying in the command from the Perfect Voice Strategy BSTU system DOS system prompt, supplying the name of the file to send/receive as the only command line argument. After keying in the “Z...” command on the Perfect Voice Strategy BSTU system, initiate the download/upload procedure in the communications software on the local PC.

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## Appendix B: Create a Custom Dialplan

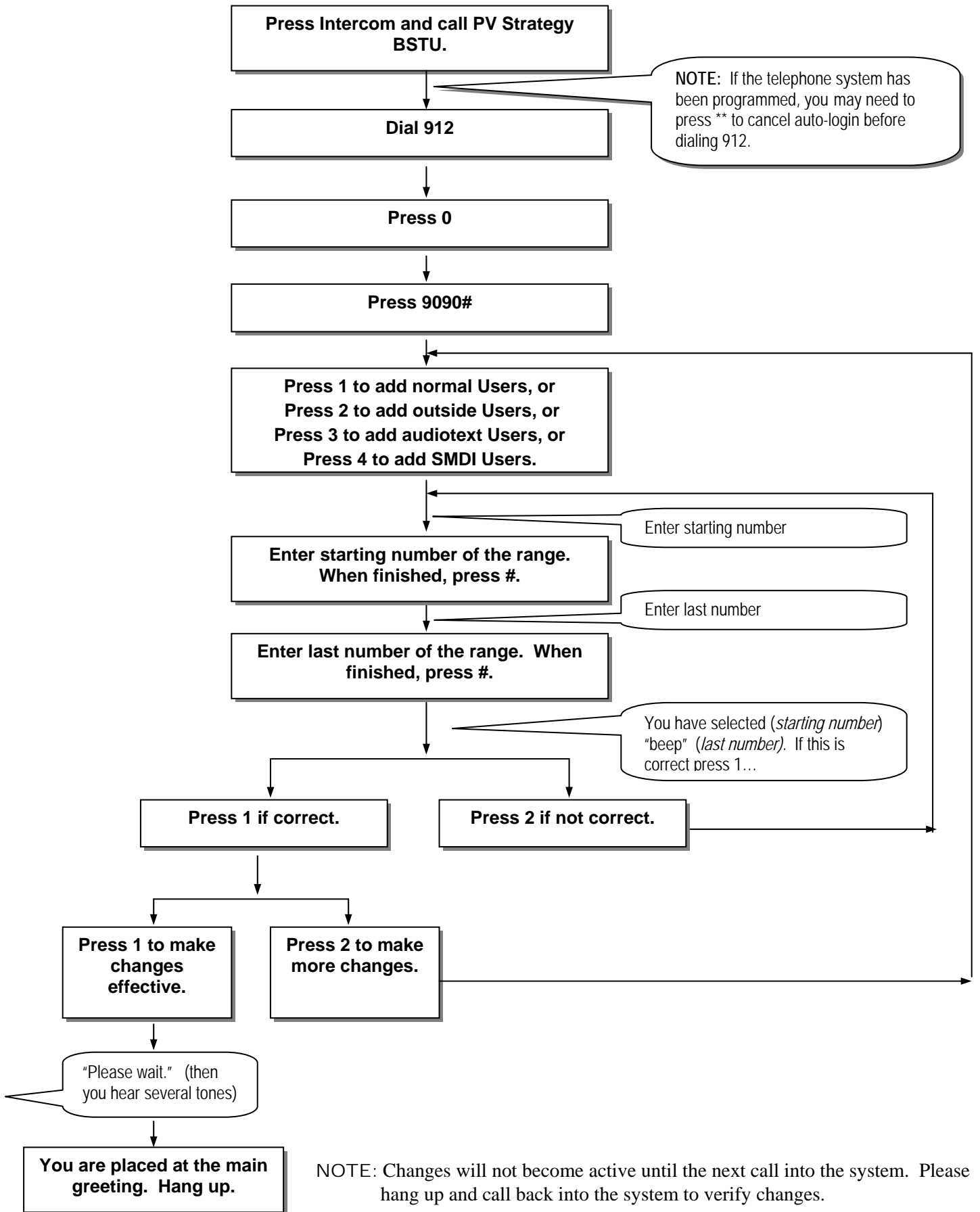
You may create a custom dialplan for Perfect Voice Strategy BSTU. You may create 2-digit, 3-digit, or 4-digit Users.

When creating a custom dialplan, keep several rules in mind:

- Due to limited disk space, the maximum number of mailboxes allowed on the Perfect Voice Strategy BSTU system is approximately 300.
- **Maximum Ranges:** 10-69 (2-digit range), 100-699 (3-digit range), and 1000-6999 (4-digit range).
- **When entering a range of numbers, the Starting number and Last number of the range must begin with the same lead digit.** For example, 20 through 29, 200 through 299, or 2000 through 2999 are valid entries. 20 through 39, 200 through 499, or 2000 through 5999 are not valid. To create Users 20 through 59, you must enter a single range at a time. First enter 20-29, then 30-39, then 40-49, then 50-59.
- **When entering a range of numbers, the Starting and Last User in the range must be the same length (2-digits, 3-digits, or 4-digits).** For example, 30-39, 300-399, or 3000-3999 are valid entries. 30-300 and 300-3000 are not valid entries.
- Once you have established a range of Users for a specific leading digit, all subsequent additions must be within the same extension length of that range. For example:

User Range Established	Leading Digit	Locked-In Extension Length	Invalid subsequent adds
30-39	3	2	300-399 (3-digits), 3000-3999 (4-digits)
400-499	4	3	40-49 (2-digits), 4000-4999 (4-digits)
5000-5999	5	4	50-59 (2-digits), 500-599 (3-digits)

- If a User already exists in a range, that User is skipped over in the creation of the range.





## Appendix C: Database Worksheets

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### User Lists : Pre-configured Dialplans

During the installation of your Perfect Voice Strategy BSTU system, the installing technician completed worksheets for the Users. The following lists are supplied for you to maintain an updated listing of all of the active Users.

#### Single Digit Worksheet

User ID	Name	Audiotext Y/N	Transfer-Only Y/N	Ext.
1				
2				
3				
4				
5				
6				

#### Auto-Detect Worksheet

User ID	Name	Ext.
990	Fax Extension	
991	TDD Extension	

#### Public Distribution Lists

User ID	Name	Ext.
950		All Normal & Outside Users
951		All Normal Users
952		All Outside Users
953		
954		
955		
956		
957		
958		
959		

## Normal User Worksheet (2-Digit)

The pre-configured 2-digit Normal Users range from 10 to 59. Make additional copies of this worksheet as needed.

User ID	Name	Pager Number	Ext.
0			0*

\*Extension may be changed using the SCREENS interface.

## Normal User Worksheet (3-Digit)

Depending on the pre-configured dialplan you selected, the Normal Users may range from 100-199, 200-299, or 300-399. Make additional copies of this worksheet as needed.

User ID	Name	Pager Number	Ext.
0			0*

\*Extension may be changed using the SCREENS interface.

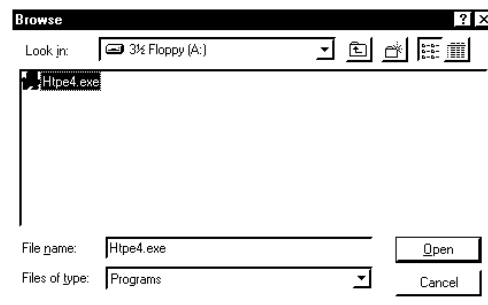


## Appendix D: Installing Hyperterminal

### Installing Hyperterminal Private Edition 4.0

Hyperterminal Private Edition 4.0 is available in the *Technician's Tool Kit*. Perform the following steps to install Hyperterminal.

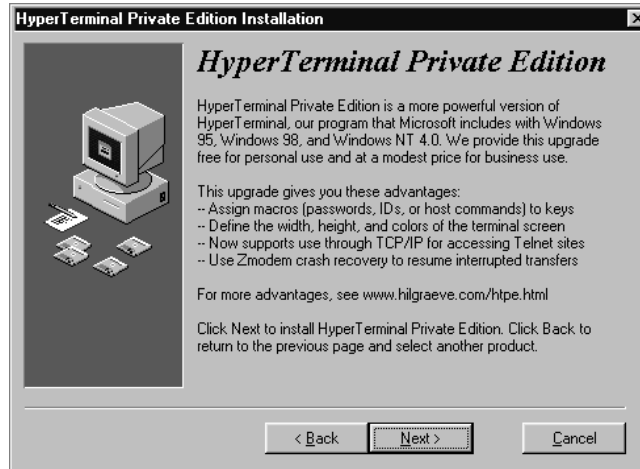
1. Turn on the computer and start Windows.
2. Insert the diskette into the appropriate disk drive.
3. Click the **Start** button and select **Run**. A dialog box appears. Click **Browse**.



4. From the appropriate disk drive, select **Htpe4.exe** and click **Open**.
5. The initial installation screen appears.



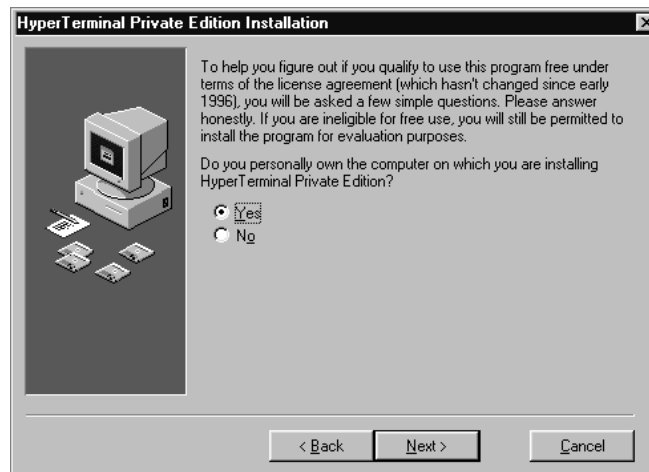
6. Select **HyperTerminal Private Edition 4.0** and click **Next**. The next screen describes this edition.



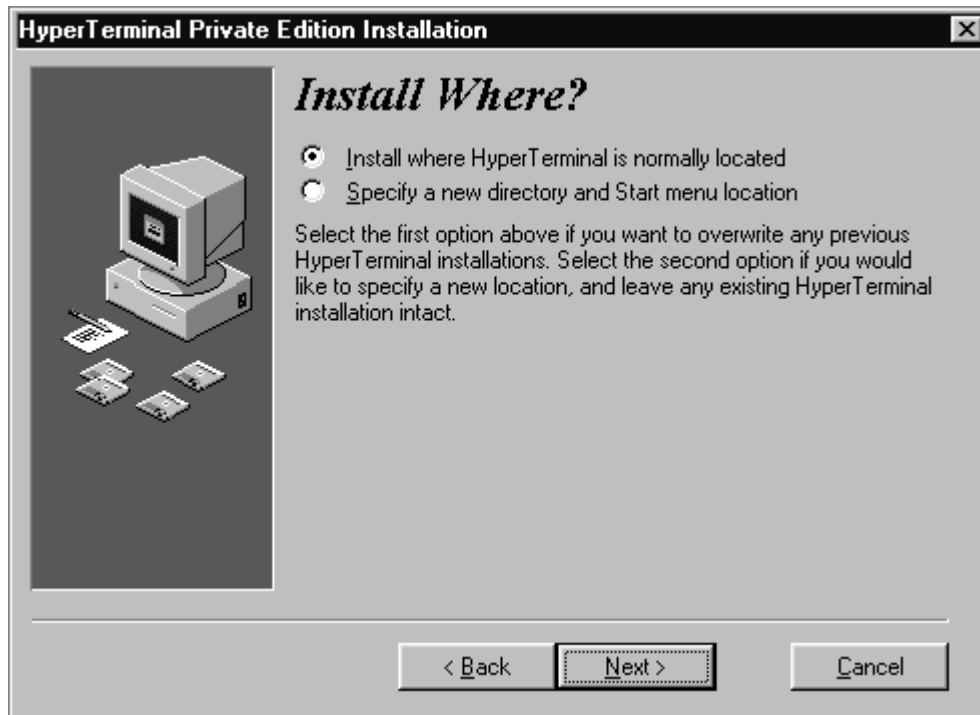
7. Click **Next**. The License Agreement screen is displayed.



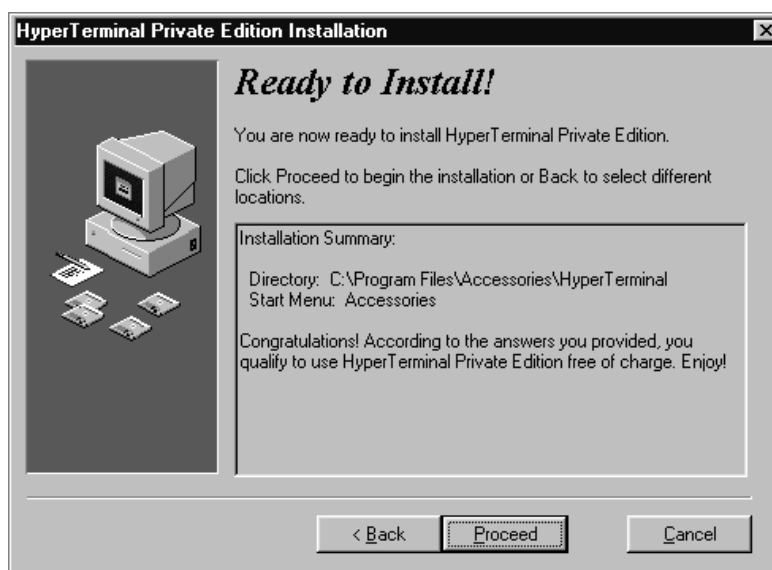
8. Select **I accept the terms of the license agreement** and click **Next**. You will be asked if you personally own the computer where HyperTerminal is being installed.



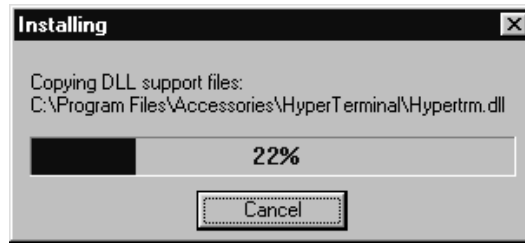
9. Answer appropriately and click **Next**.



10. Specify where to install HyperTerminal Private Edition and click **Next**.



11. Click **Proceed**.



12. Click **Finish**.



## Setting Up HyperTerminal Private Edition 4.0

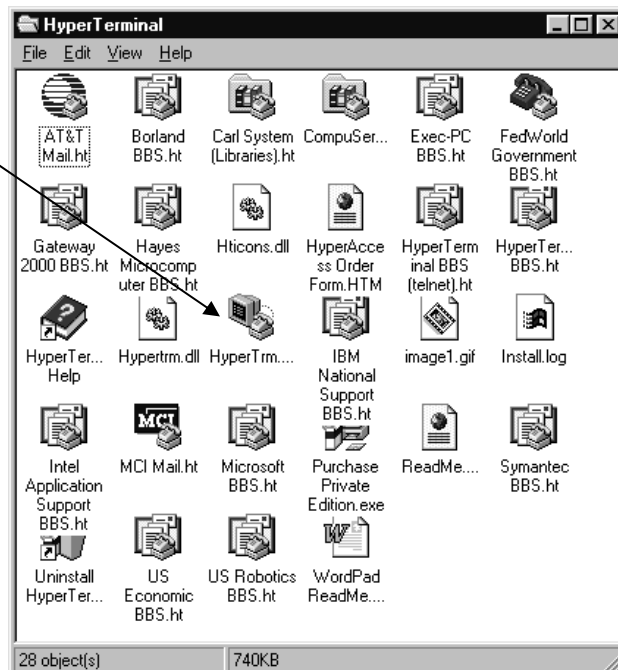
It is recommended that you create 2 template files:

1. For Remote Connections.
2. For Direct Connections.

The template file(s) will allow you to map the keys and modify properties one time. Then you may easily create specific customer files by saving the template file under another name and editing the telephone number.

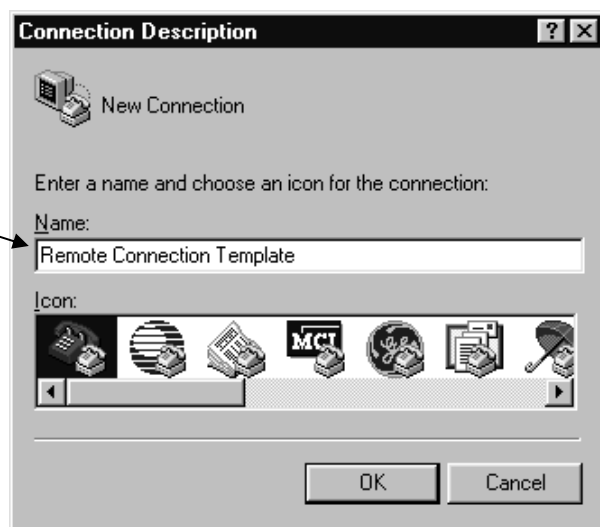
### To start HyperTerminal:

- Click the Windows Start button – select Programs.
- Select Accessories – HyperTerminal.
- Double-click the HyperTerminal icon.



## Creating a Remote Connection Template

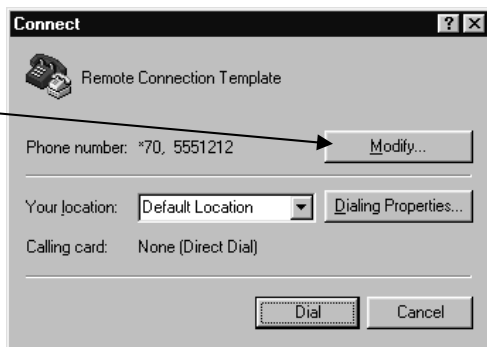
1. Access HyperTerminal as described above. After the “splash” screen, this screen appears.
2. Enter **Remote Connection Template** for the Name and click **OK**.



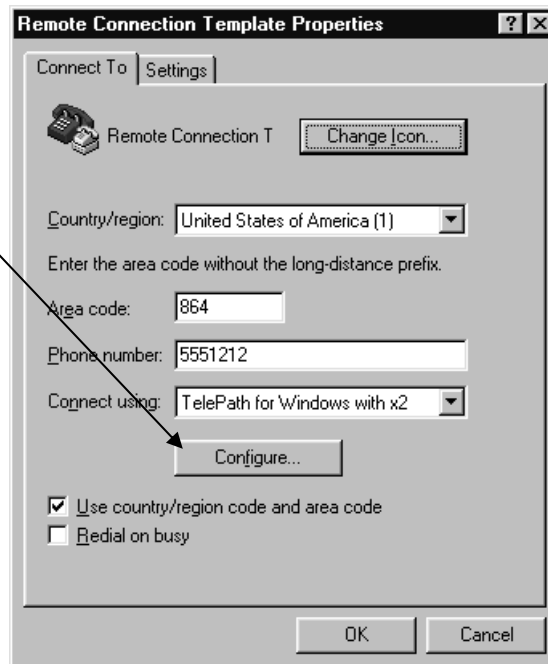
3. Enter a telephone number (no dashes) and click **OK**.



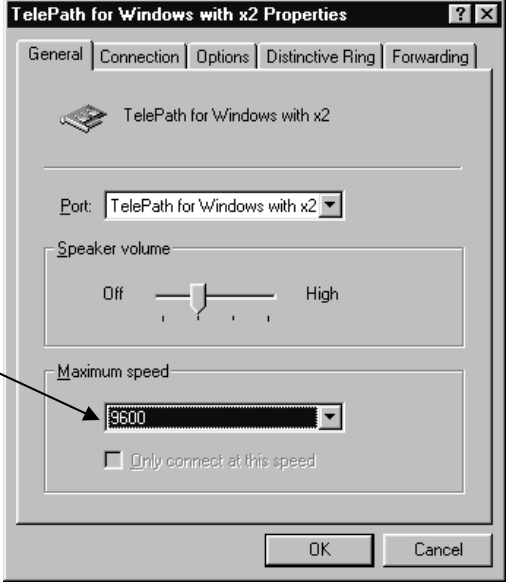
4. Click **Modify**.



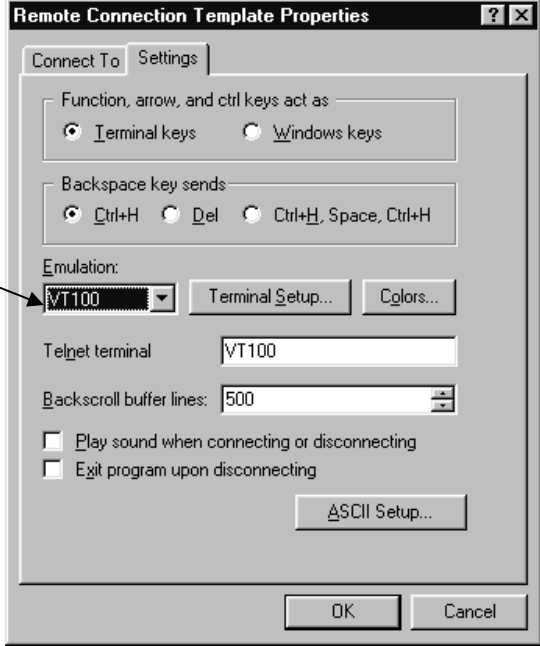
5. On the **Connect To** tab, click **Configure**.



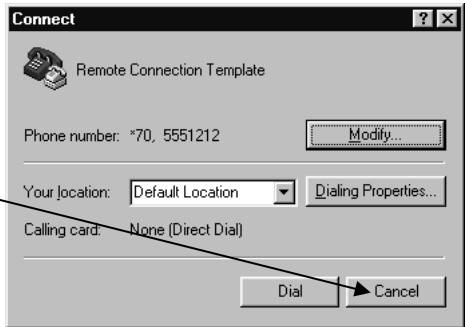
6. Select the maximum speed your system will support and click **OK**.



7. On the **Settings** tab, set **Emulation** to **VT100** and click **OK**.

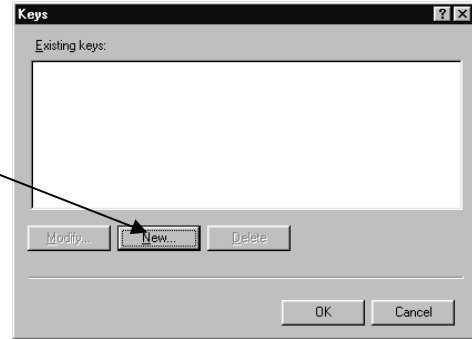


8. Click **Cancel**.

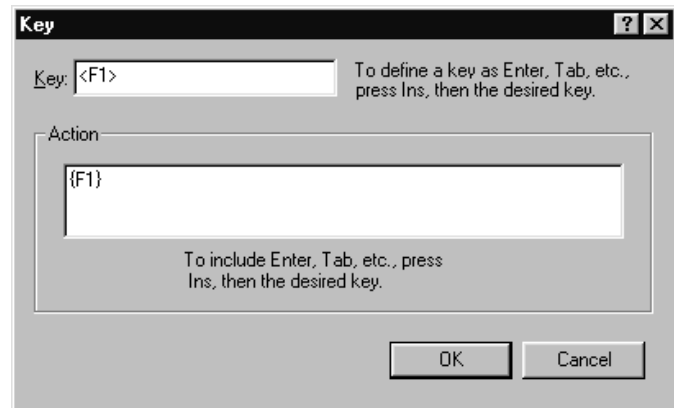


9. Now you need to map the keys for the Remote Connection Template.

- From the top-line menu, select **View—Key Macros**
- Click **New** to map a new key.



- In the **Key** field, you press **<Insert>** on your keyboard, then press the key you wish to map (for example press **<Insert> <F1>**). Then in the **Action** box, enter the appropriate action, specifying keys with braces (**{ }**). For example, press **<{> <F> <1> <}>** on the keyboard.

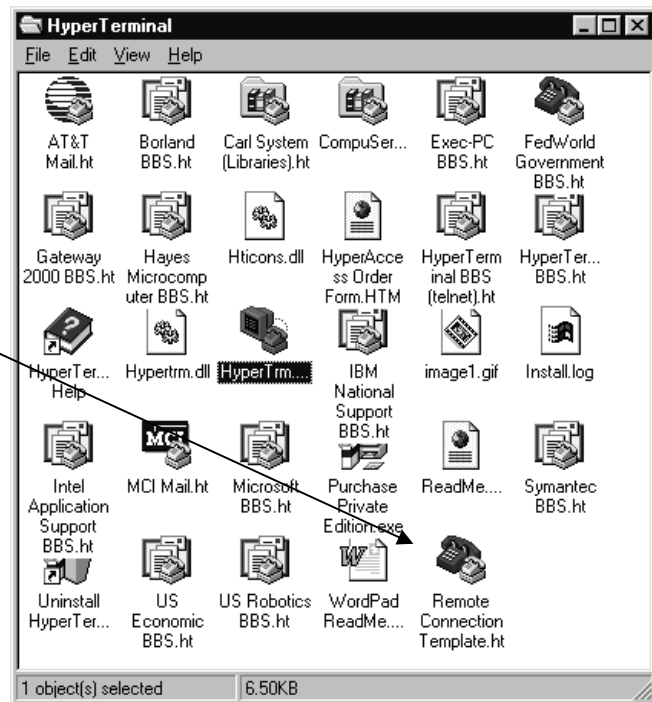


Below is a list of the keys you need to map. For more information on how key-mapping works, see “*Working Remotely*” earlier in this appendix. When complete, click **OK**.

If you key in this locally...	Klinic “presses” this key on the remote system.
{F1}	F1
{F2}	F2
{F3}	F3
{F4}	F4
{F5}	F5
{F6}	F6
{F7}	F7
{F8}	F8
{F9}	F9
{F10}	F10

If you key in this locally...	Klinic “presses” this key on the remote system.
{F11}	F11
{F12}	F12
{PGUP}	PageUp
{PGDN}	PageDown
{HOME}	Home
{END}	End
{INS}	Insert
{DEL}	Delete
{BREAK}	Break

10. When the keys are mapped you need to save this session. From the top-line menu, select **File – Save**. The next time you access HyperTerminal the new session will be displayed.



## Create New Session Based on the Remote Connection Template

Now that you have created a template for remote connections, you can use the template to create new files. There are two ways to do this. You may copy and paste the template to a new session or Save as the template to a new session.

### To copy:

- From the **HyperTerminal** window (above), right-click the **Remote Connection Template** icon and select **Copy**. Then right-click in the window and select **Paste**. A copy will appear in the window. You may rename the copy (perhaps to a customer name) by right-clicking the copy and selecting **Rename**. Then you need to open the new file and modify the telephone number. The key-mapping and other modifications will be copied from the template.

### To Save As:

- Open the template file. From the top-line menu, select **File-Save As**. Save the file to a different name. Again, edit the telephone number and save.

### NOTE

To edit the telephone number, select **File-Properties**.

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## Appendix F: Call Record

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### Programming and Using Call Record

Call Record allows users to record telephone conversations. The recorded conversation will be saved as a message in the specified mailbox. Telephones may be set up for automatic or manual record mode. If your state requires that a beep play during the recording, please follow the instructions below for programming the live-record beep.

#### NOTE

In order to use call record, the system must be using SMDI Integration.

### Station Programming

For each station that will be set up for Call Record, you must program the record and pause/resume buttons. You must also program the station for automatic or manual record mode.

- Program Record and Pause/Resume Buttons onto each station.
- Program the station to use either Automatic or Manual record mode. (Mailbox Selection: Program 203 Field 23).

### Programming the live-record beep (if required)

If your state requires that a beep play while recording a telephone conversation, you need to program Perfect Voice Strategy BSTU to play a live-record beep:

- Log into SCREENS
- Select Receptionist
- Select User Directory
- Go to Screen 2, press F4
- Edit the **Application or ID** field. This field specifies how often (in 1 0ths of a second) the live-record beep plays while recording a call on Perfect Voice Strategy BSTU system. If this field is set to 0, no beep is played. The recommended value for this field is 200. This will play the beep every 20 seconds.

### Using Call Record

If using Automatic record mode:

- After the call is established, press **RECORD** on the telephone. The recordings will be placed into the default mailbox for the extension.

If using Manual record mode, recordings may be placed in the default mailbox or in an alternate mailbox specified by the User:

- After the call is established, press **RECORD** + “#” to place the recording in the default mailbox.
- After the call is established, press **RECORD** + <Mailbox Number> + # to record into alternate mailbox.

While recording, you may press the Pause/Resume button to temporarily stop the recording. Press the button again to continue recording. Press **RECORD** key to end recording. Recording will automatically end when the call is terminated.

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## Appendix G: Terms

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Understanding the meaning of the following terms is the first step to understanding Perfect Voice Strategy BSTU.

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<b>caller</b> .. .. .	An individual calling your company from an outside line.
<b>User</b> ... .. .	An individual who is defined on Perfect Voice Strategy BSTU system.
<b>User ID</b> .. . . .	A two, three, or four-digit number assigned to each User. This is the number or “extension” that a caller enters to select a User. The User ID is often the same number as the User’s telephone system extension number.

---

<b>personal greeting</b> .. .. .	The message heard by a caller when the User he is trying to reach is not available. This message is normally by the User in his own voice. A personal greeting might sound something like, “ <i>You have reached the voice mailbox of Nancy Jones. I am not able to take your call at this time....</i> ”.
<b>greeting</b> .... .. .	The recorded message heard by callers after the system answers their call (i.e. “ <i>Thank you for calling ABC Company...</i> ”)
<b>whattodo</b> ... .. .	The recorded message heard by callers immediately after the system plays the greeting (i.e. “ <i>Using your touch-tone phone, please enter the extension of the person you wish to reach...</i> ”).
<b>audiotext</b> ... .. .	A message heard by a caller after selecting certain single digit options (i.e. “ <i>Our mailing address is 110 Oak Street...</i> ”).

---

<b>automated attendant</b> ...	A function of Perfect Voice Strategy BSTU in which callers are transferred to a User’s extension after entering his or her User ID.
<b>voice messaging</b> .... .. .	A function of Perfect Voice Strategy BSTU in which messages are recorded for a User or group of Users.

---

<b>DTMF</b> . .. . . .	The tone generated by a touchtone telephone when one of its keypad digits is pressed.
<b>default operator</b> .... .. .	The User to which a caller is transferred to if no selection is made from the main greeting or <b>whattodo</b> .
<b>distribution list</b> .. . . .	A group of Users to whom a message can be easily sent or forwarded by selecting a single number.
<b>Directory assistance</b> ....	Offers callers who do not know your User ID the option of “spelling out” your name by pressing the telephone keys that correspond to your last name.

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## Modes of Operation

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### Primary Attendant

When Perfect Voice Strategy BSTU is configured as the primary attendant, a caller who dials your company’s main telephone number is answered by the Perfect Voice Strategy BSTU system. The *automated attendant* function allows the callers to enter a User ID and Perfect Voice Strategy BSTU processes the call based upon the User ID entered.

### Secondary Attendant

When Perfect Voice Strategy BSTU is configured as the secondary attendant, a person answers a caller who dials your company’s main telephone number. However, if the caller dials a secondary or “back door” telephone number, or if there is more call activity than the human attendant can handle, Perfect Voice Strategy BSTU answers the call. The calls are then processed just as if the Perfect Voice Strategy BSTU were a primary attendant.

---

**Voice Messaging**

In this mode, a call is directed to Perfect Voice Strategy BSTU, because the User is not available to take the call. Perfect Voice Strategy BSTU then records a message for the User. This is *voice messaging*.

---

**Users**

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**Normal Users**

Normal Users are those individuals who have a physical extension number on the telephone system that directly corresponds to their User ID, or mailbox, on the Perfect Voice Strategy BSTU system. If the called extension number is busy or does not answer, the caller is prompted to leave a message, enter another extension number or press 0 to reach the operator. The Normal User and Outside Mailbox User IDs may be two, three, or four digit numbers.

---

**Outside Mailbox Users**

Outside Mailbox Users are those individuals who do not have a physical extension number on the telephone system but who do have a mailbox on the Perfect Voice Strategy BSTU system. When a caller enters an Outside User ID, Perfect Voice Strategy BSTU immediately plays the personal greeting for the mailbox and allows the caller to leave a message or dial another extension. The Normal User and Outside Mailbox User IDs may be two, three, or four digit numbers.

---

**Audiotext Mailbox**

An Audiotext Mailbox is not associated with a specific telephone extension and does not take messages. Instead, it plays a pre-recorded greeting that provides information to callers. The information could be anything the company would like callers to have but does not necessarily need a person to say. Audiotext boxes are useful in playing information to callers such as the company address, fax number, business hours and general information.

---

**Auto-Detect Users**

Two Auto-Detect Users are pre-defined (990=fax extension, 991=TDD extension). Use the SCREENS interface to specify the extension(s).

---

**Single Digit Users**

Single Digit Users available are 1, 2, 3, 4, 5, and 6. These Users may also be defined as audiotext boxes and/or transfer boxes.

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**System Codes**

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**Pre-Defined System Codes**

The pre-defined system codes are as follows:

- System Access code: 7
- Hang-up, or Endcall code: 998
- Direct to take a Message: 997
- Direct to Personal Greeting: 8
- Directory Assistance: 9

