
 **Path Finder^{IP}**

Client User Guide

Includes Desktop Call Control Features

Issue 1.1 - March, 2005

| Issue | Release Date | Changes |
|-------|--------------|---|
| 1 | 06-04 | Initial Release |
| 1.1 | 03-05 | <i>Retrieving and Managing Voice Messages</i> -- Mailbox Options [7] Fast Forward, and [8] Rewind will be available in the next software release. |

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Introduction

This user guide describes mailbox owner options and how to modify their settings. Using one or more of the voice modules shown below, a user can set up the parameters that control their own mailbox and how they will receive different types of messages.

General Mailbox Features

1) PathFinder^{IP} Web Browser Menus

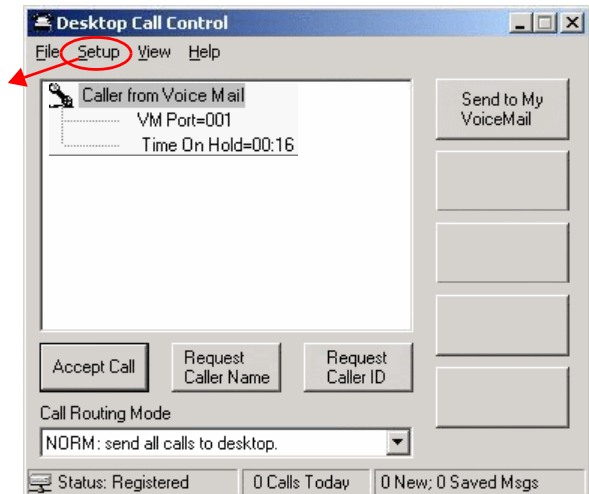
| | |
|---|--------------------------------------|
| Name & Contact | ... change name & e-mail address |
| Passwords | ... modify mailbox/web passwords |
| Language & Operator | ... use "run" codes to answer calls |
| Signature & Greetings | ... download pre-recorded prompts |
| Notification Settings | ... receive selected messages |
| Locator Settings | ... use alternate phone number |
| E-Mail Reading* | ... listen to e-mails over telephone |
| E-Mail Contacts* | ... send messages to personal list |
| * See Administrator regarding optional programs required. | |



2) "Optional" DCC Desktop Program

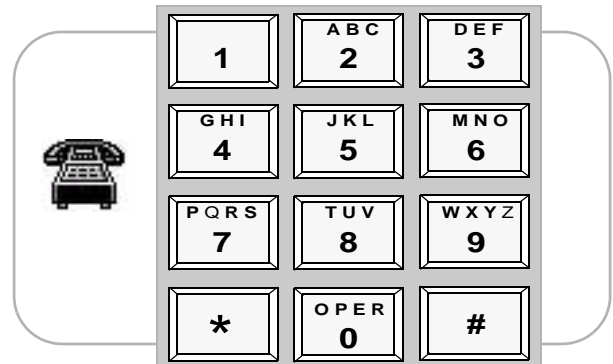


| | |
|----------------------|---|
| General Settings | ... set all-call parameters |
| Alert Settings | ... select audio files |
| Action Settings | ... specify user-defined call functions |
| Button Settings | ... use one-touch call buttons |
| ACH Contact Settings | ... access personal distribution list |
| Prompt Settings | ... record prompts |



3) Voice Mailbox Keypad Options

| | | |
|-----|-----|------------------------------------|
| [1] | ... | Retrieve Messages |
| [2] | ... | Send Messages |
| [6] | ... | Extended Options |
| [7] | ... | Admin |
| [8] | ... | Personal Options |
| [0] | ... | Transfer to a Mailbox or Extension |



Web Browser Menus

This section describes the Client User functions that may be accessed from a web browser to control the activities that pertain specifically to their own mailbox.

Getting Started

This section covers each web screen presented by the *PathFinder^{IP}* to a user with Client logon capabilities, and describes each system setting.

PC Requirements

Make sure the Client PC meets the following requirements:

| HARDWARE | |
|------------------|--|
| Processor | Pentium II - 233 Mhz |
| Memory | 64 MB of RAM |
| Drives | Hard Drive - 10 MB of free disk space CD-ROM Drive |
| Miscellaneous | Monitor, Keyboard and Mouse Sound Card PC Speakers Microphone (good quality) |
| SOFTWARE | |
| Operating System | One of the following programs: Windows 95, OSR2 with DCOM 95 Windows 98, Second Edition Windows ME Windows NT 4.0 (Service Pack 6a) Windows 2000 (Service Pack 1) |
| Browser | Internet Explorer 5.5 (required) |
| E-mail Client | POP3/IMAP4 compatible (<i>required for Unified Messaging</i>) |

Web Access Requirements

- » To access the web interface: Internet Explorer 5.0 or higher must be used, and the user must be connected to the *PathFinder^{IP}* machine.
- » The name of the *PathFinder^{IP}* machine, or its IP address is also required. The URL for browsing is: *http://<machine name or ip address>/PathFinderIP*



EXAMPLE ... if the machine is called "OurPathFinderIP" and the IP address is "128.10.10.5", either of the following can be used to connect to the web interface:

http://OurPathFinderIP/PathFinderIP ... OR ... *http://128.10.10.5/PathFinderIP*

NOTE -- If the user forgets to add "*PathFinderIP*" onto the URL, they will get a web page that says "Under Construction".

Log On Screen

Once connected to the *PathFinder^{IP}* system, the user will be presented with a login screen.

Name/Password



When the System Administrator sets up a new account, they will need to provide the user with a valid Web Name and Password in order for them to access the web interface (*System Administrator > Accounts > Web Access*).

Timeout Period

After logging in, if a user does not interact with the web interface for 5 minutes ... the system will automatically go into timeout mode. The next time the user selects an item, they will be prompted to log back in.

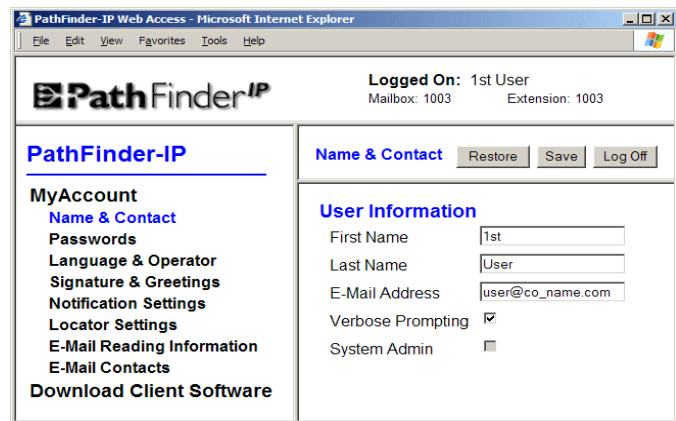


Main Screen Layout

Once logged in, the web screen is split into three (3) primary frames.

Browser Frames

- » The **TOP frame** displays “read only” data that identifies the user who is currently logged in.
- » When an item is selected in the **Menu frame** on the left ... it will automatically expand to reveal any related items in the “Data frame” on the right.
- » The settings in the **Data frame** on the right ... can be modified whenever necessary. The information in the “header” indicates the user’s current location within the menu system, and displays the action buttons that apply to that setting.



Browser Buttons

The browser buttons will change according to the menu selected (on the left), or when a data item is chosen (on the right).

Appears on each page ... *Other browser buttons include ...*

| Restore | Save | Log Off | Add | Edit/Change | Delete | Browse | Upload | Play | Calendar |
|--------------------|----------------|-------------|------------------|----------------|----------------|------------------|---------------------|------------------|------------------|
| recover orig value | capture change | exit system | create new entry | modify setting | remove setting | search directory | send file to Server | listen to prompt | select date/time |

MyAccount - Menu Options

Name & Contact

The Name and Contact data is the unique information that identifies the mailbox owner and allows them to access their voice mailbox.



- » The System Administrator will need to enter a first and last name when setting up any new account.
- » Once this is completed, the user will be able to log into the system and modify the following User Information.

User Information

| Setting | Description |
|-------------------|--|
| First Name | The first name of the person set up to use this account. |
| Last Name | The last name of the person assigned to this account. This data will also be used for the company directory when a caller does not have their party's mailbox or extension number. |
| E-Mail Address | The e-mail address for the owner of this account which allows them to receive e-mails in their mailbox. |
| Verbose Prompting | This option tells the system to play longer, more helpful prompts. |
| System Admin | This "read only" field shows if the user has been given system administrator rights on the Sys Admin>Accts>Genl web page. |

Passwords

Password information allows each user to access their mailbox, and modify this data using a web browser.



The initial password is set up by the System Administrator, but may be modified by the user once they login successfully.



User Information

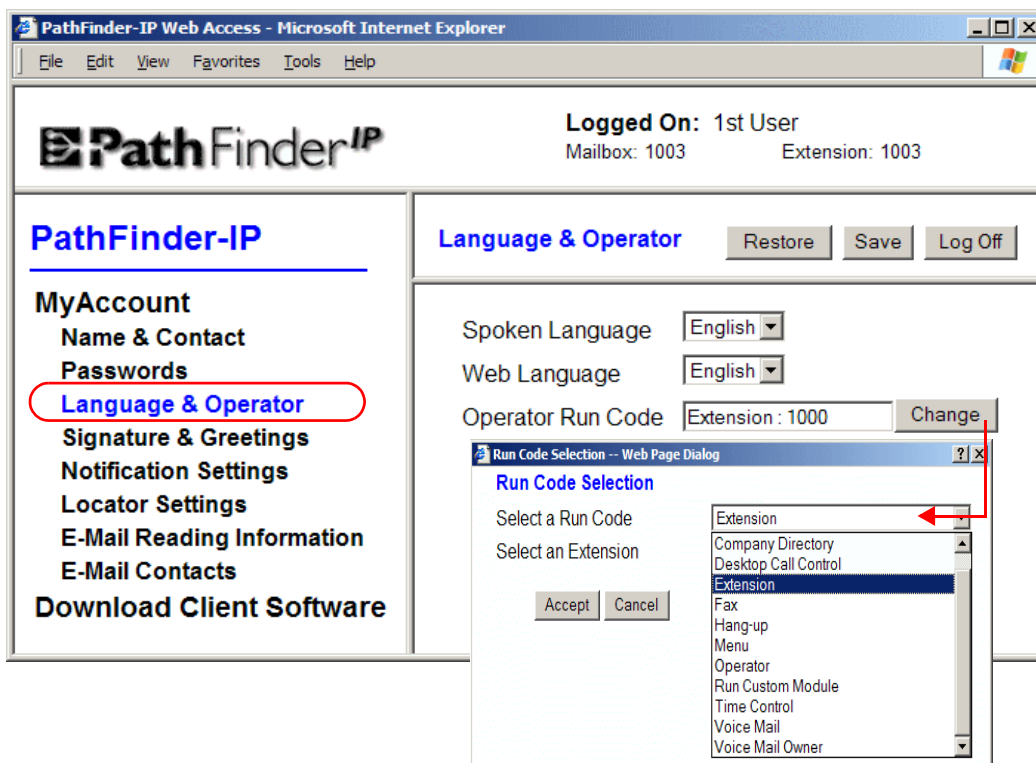
| Setting | Description |
|------------------|---|
| Mailbox Password | The password to use to access this mailbox. |

Web User Information

| Setting | Description |
|----------|--|
| User ID | Name to use when logging in on the web. |
| Password | Password to use for web login (4 digits, 0000-9999). |

Language & Operator

The *LANGUAGE & OPERATOR* page displays the language that will be used for voice prompts and web pages, and the “operator run code” assigned to incoming calls.



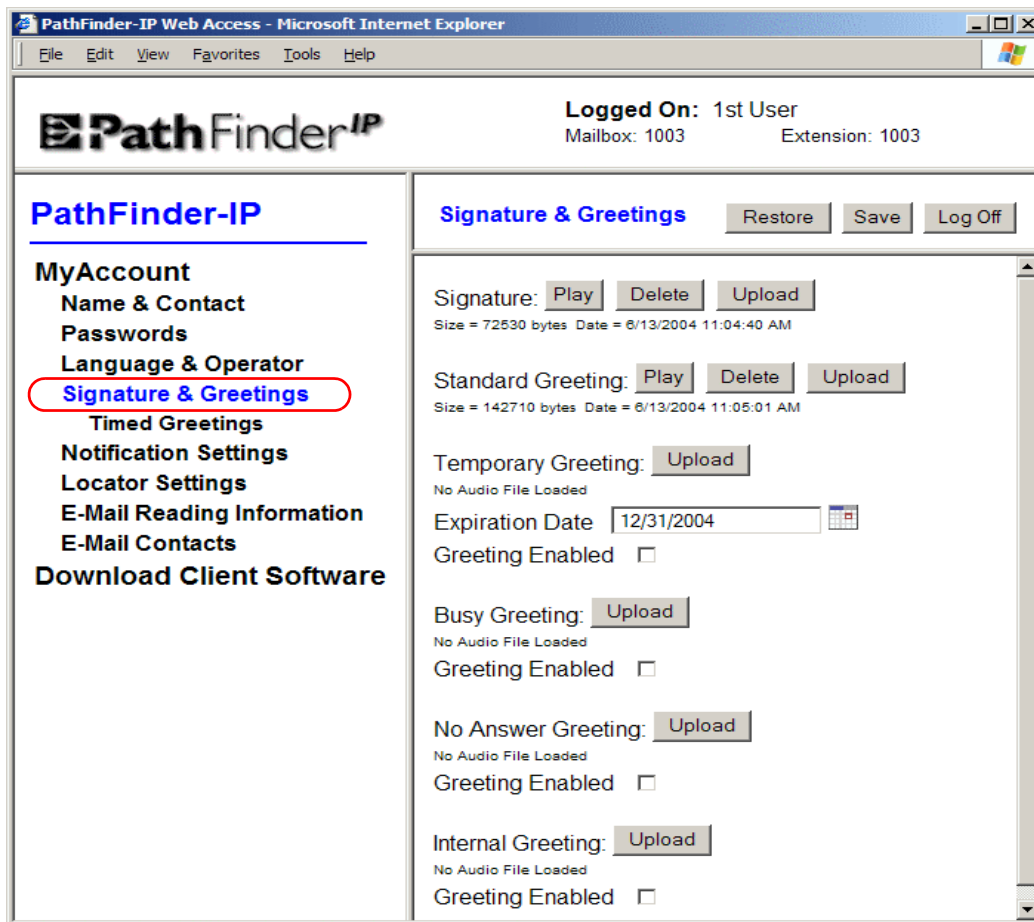
| Setting | Description |
|-------------------|---|
| Spoken Language | The language* to use for this account when speaking prompts over the phone. |
| Web Language | The language* to use when displaying information on the web. * When option is available, and enabled on the software key. Default=English |
| Operator Run Code | This setting defines the personal operator for the account. Leave this field blank to use the system operator. The following Run Code options are: <ul style="list-style-type: none"> <input type="checkbox"/> Command File > Select a Run Code <input type="checkbox"/> Company Directory > Select a Directory Type (<i>Extension or Mailbox</i>) <input type="checkbox"/> Desktop Call Control <input type="checkbox"/> Extension > Select an Extension <input type="checkbox"/> Fax <input type="checkbox"/> Hang-up <input type="checkbox"/> Menu > Select a Menu (<i>OffHours for Night menu or Primary for Day menu</i>) <input type="checkbox"/> Operator <input type="checkbox"/> Run Custom Module > Select a Custom Module <input type="checkbox"/> Time Control > Select a Time Control <input type="checkbox"/> Voice Mail > Select a Mailbox <input type="checkbox"/> Voice Mail Owner > Select a Mailbox (<i>with or without a password</i>) <p><i>Example -- To set the personal operator to extension 123, press [Change]. From the [Select a RunCode] pull-down list, select [Extension]. In the [Select an Extension] pull-down list, select [123].</i></p> |

Signature & Greetings

The *SIGNATURE & GREETINGS* page displays all the standard (non-timed) greetings available, those without time-sensitive rules enabled.

Greetings -- For those greetings where the user has recorded a prompt, the file size, date and time of the prompt will be displayed.

New Prompts -- The user can also choose to [Play], [Delete] or [Upload] a new prompt. For greetings where the user has not recorded a prompt, the user can only select to [Upload] a new prompt.



| Setting | Description |
|--------------------|---|
| Signature | This is the name that represents this account. |
| Standard Greeting | This is the standard personalized mailbox greeting. |
| Temporary Greeting | This greeting is played on a temporary basis. <i>Example</i> ... if someone goes on a trip, they can record a Temporary greeting saying they are out of the office. |
| Expiration Date | When does this greeting expire. Date and time allowed. |
| Greeting Enabled | Is the Temporary greeting enabled? |
| Busy Greeting | Plays if an outside caller is sent to the mailbox because the extension was busy. |

| Setting | Description |
|--------------------|---|
| Greeting Enabled | Is the Busy greeting enabled? |
| No Answer Greeting | Plays if outside call is sent to the mailbox because the extension was No Answer. |
| Greeting Enabled | Is the No Answer greeting enabled? |
| Internal Greeting | Plays if an inside caller is sent to the mailbox. |
| Greeting Enabled | Is the Internal Greeting enabled? |

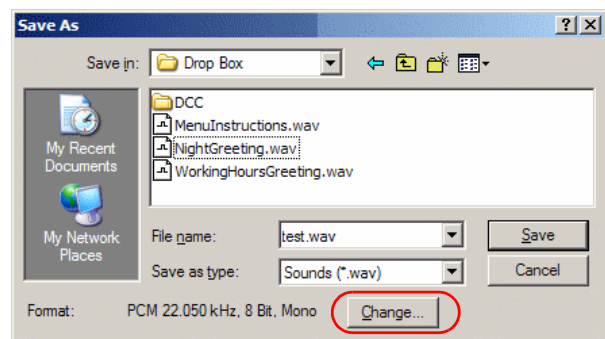
Recording Signatures/Greetings

The Windows Sound Recorder utility (SndRec32.exe) is used to record messages for signatures and greetings. To achieve the highest quality audio for greetings and signatures, the user will need to change the audio format of EACH .wav file created with the Sound Recorder program.

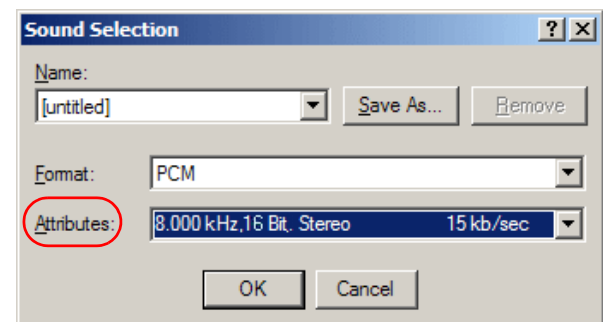
1. To open the Sound Recorder, click the Start button, then select Programs/Accessories/Entertainment/Sound Recorder.
2. When the *Recorder* window opens, press the [Record] button to start recording a prompt. Press [Stop] when finished.
3. To listen to the prompt, or to re-record, press [Play].



4. To modify the audio setting for the best sound results, select File/Save As, then click [Change].

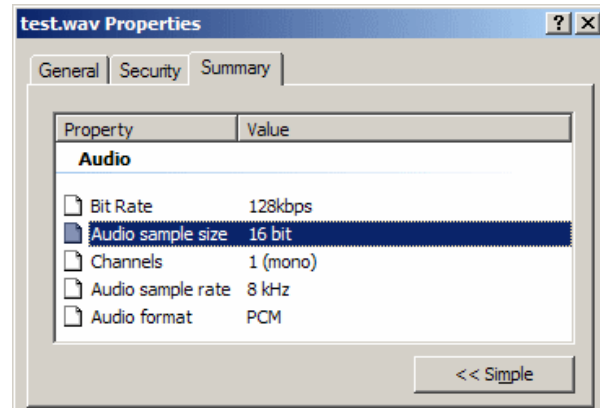


5. When the *Sound Selection* window opens, click on the Attributes field and scroll down to the "8.000 kHz, 16 Bit, Mono" setting. Then click [OK] to select that setting.
6. Once the *Save As* window returns, enter a name for the new prompt and click [Save].



To verify the setting changes:

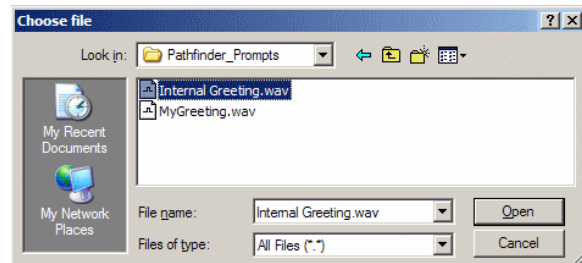
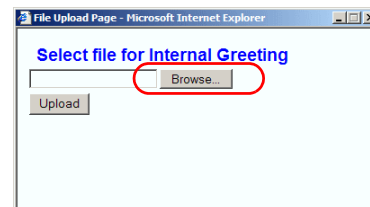
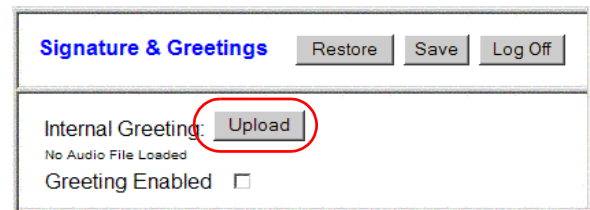
1. Right-click on the new .WAV file, and select Properties.
2. To view the file property values, select the Summary tab.



Uploading a Greeting - EXAMPLE

First, the user will need to record the prompt on their PC using the Sound Recorder, and then save it as a .WAV file.

1. Once the prompt is recorded, click the [Upload] button next to the desired greeting on the *Signature & Greetings* page.
2. When the *File Upload Page* displays, click [Browse] to locate the prompt on your PC.
3. In the *Choose File* window, highlight the appropriate .WAV file and click [Open].
4. When the *File Upload Page* returns and the selected filename appears, click [Upload] to place the prompt on the *PathFinder^{IP}*.

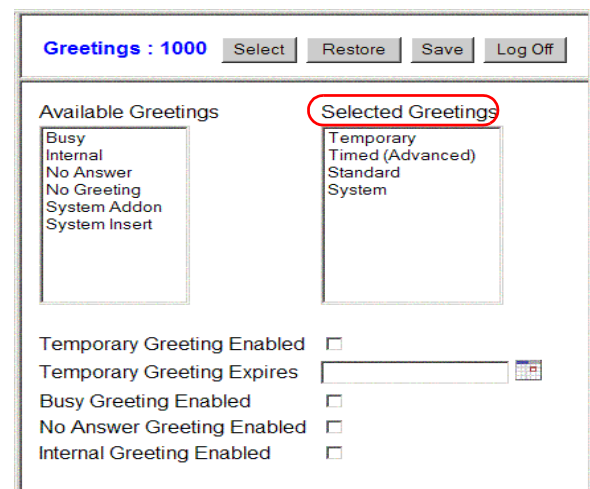


Maintaining System Greetings



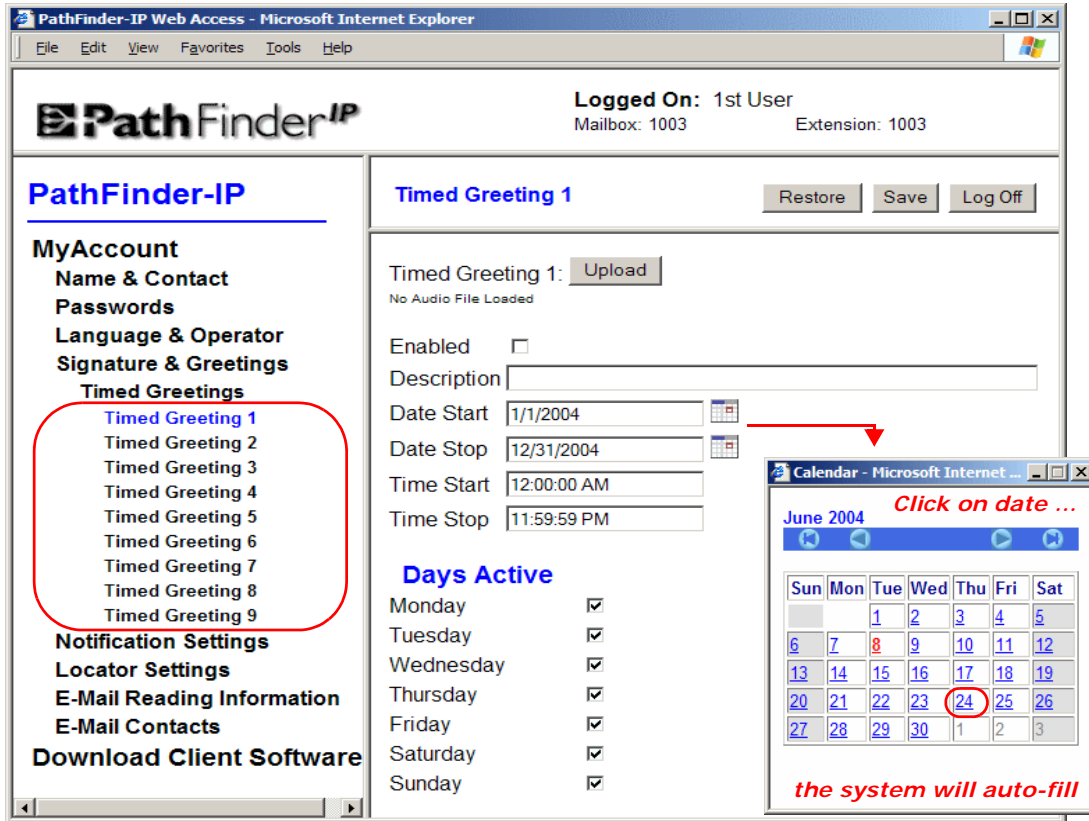
Even though users are allowed to record and upload personalized prompts, the System Administrator controls which greetings are enabled.

- » Greeting types are located under: System Admin > Accounts > Mailbox Settings > Greetings.
- » The "Selected Greetings" list determines the greetings that will play and in what order.
- » Once a particular type of mailbox greeting is played, the system does not play any other mailbox greetings.



Timed Greetings

Each mailbox owner is allowed to use nine (9) Timed Greetings, each with different time/date parameters. These greetings are activated based on rules set up by the user.



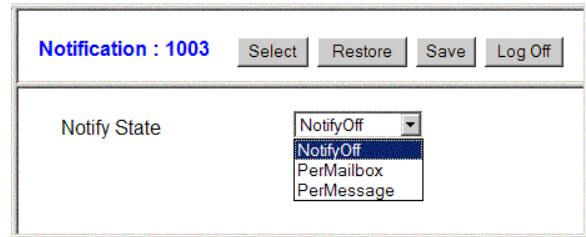
| Setting | Description |
|---------------------------|--|
| Timed Greeting 1-9 | Press the [Upload] button to select the audio file for each timed greeting. |
| Enabled | Check (✓) this setting in order to activate the timed greeting parameters. |
| Description | Use a descriptive name or phase that identifies the greeting. |
| Date Start | Click on the calendar icon to select the “first day” the greeting should play. |
| Date Stop | Click on the calendar icon to select the “last day” the greeting should play. |
| Time Start | Enter the “earliest time” of day the greeting should play. |
| Time Stop | Enter the “latest time” of day the greeting should play. |
| Days Active | Choose one or more days of the week. |
| Monday thru Sunday | Select each day the greeting should play. |

Notification Settings

To activate the notification function, the user must change the "Notify State" to PerMailbox or PerMessage.

 Sys Adm

These settings are also located on the web under: System Admin > Accounts > Mailbox Settings > Notification. By default, the notification mode is set to "NotifyOff".

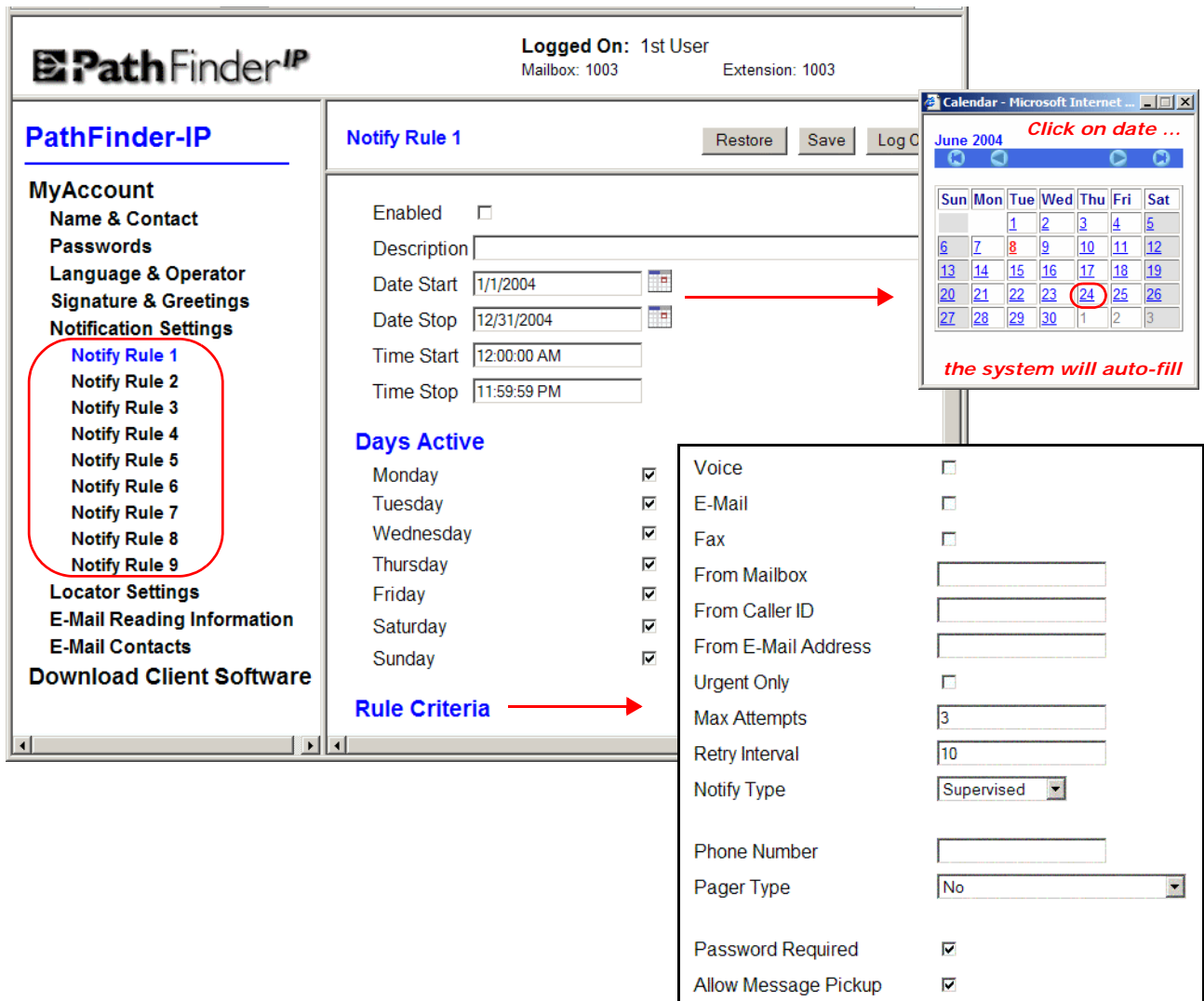


Notification : 1003 [Select] [Restore] [Save] [Log Off]

Notify State:
 NotifyOff
 PerMailbox
 PerMessage

Notification Rules

There are two notification types, telephone and pager. The user can determine when to be notified of new messages, and which types of messages to receive by using the nine (9) notification rules provided. Refer to the "Setting/Description" table for parameter definitions.



PathFinder-IP Logged On: 1st User
Mailbox: 1003 Extension: 1003

Notify Rule 1 [Restore] [Save] [Log C]

Enabled

Description:

Date Start: 1/1/2004

Date Stop: 12/31/2004

Time Start: 12:00:00 AM

Time Stop: 11:59:59 PM

Days Active

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Rule Criteria

Voice E-Mail Fax

From Mailbox

From Caller ID

From E-Mail Address

Urgent Only

Max Attempts: 3

Retry Interval: 10

Notify Type: Supervised

Phone Number

Pager Type: No

Password Required Allow Message Pickup

Web Browser Menus

| Setting | Description |
|--|---|
| Notify Rules (1-9) | |
| Enabled | Check (✓) this setting in order to activate the date/time parameters. |
| Description | Enter a descriptive title for when and/or how a notification rule will be used. |
| Date Start | Click on the calendar icon to select the "first day" the rule should be used. |
| Date Stop | Click on the calendar icon to select the "last day" the rule should be used. |
| Time Start | Enter the "earliest time" of day a rule may be used. |
| Time Stop | Enter the "latest time" of day a rule may be used. |
| Days Active | |
| Monday thru Sunday | Check (✓) each day this rule should be used. |
| Rule Criteria | |
| Voice | Check (✓) if this rule should be used on voice messages. |
| E-Mail | Check (✓) if this rule should be used on e-mail messages. |
| Fax | Check (✓) if this rule should be used on fax messages. (<i>Fax program required.</i>) |
| From Mailbox | If "Voice" is checked and a mailbox number is entered here, the rule will only be used if the message is from this mailbox. |
| From Caller ID | If "Voice" is checked and a caller ID value is entered here, the rule will only be used if the message is from this caller ID. |
| From E-Mail Address | If "E-Mail" is checked and an e-mail address is entered here, the rule will only be used if the message is from this address. |
| Urgent Only | This rule is used only if the caller indicates the message is "urgent". |
| Max Attempts | This setting determines how many times <i>PathFinder^{IP}</i> will try to notify a mailbox owner that a new message has been received. Enter the number of attempts (1 to 99) to be used with the rule selected. |
| Retry Interval | This option determines the time interval between each notification attempt until the owner retrieves message. Enter the number of minutes up to 999. |
| Notify Type | Specify the type of dialing allowed for the calls to be received. Values are: Blind (pager), Supervised (internal), DTMF (non-pager), and Command File. » <i>DTMF option will not function properly ... if "Pager Type" setting is used.</i> |
| Notify File | This option is only available if <i>Command File</i> is selected as the "Notify Type". Enter the command filename when the text box appears (e.g., PAGER12). |
| » » » <i>The following fields will display ... unless ... the "Command File" option is used for the "Notify Type".</i> | |
| Phone Number | Enter the phone number for <i>PathFinder^{IP}</i> to dial when pre-determined calls and message types are received. |
| Pager Type | If the number entered in the "Phone Number" field is for a pager, change the setting to YES. Then select the type of data you want to receive when notified: <input type="checkbox"/> <i>Yes, Simple Pager</i> -- mailbox number where messages were received. <input type="checkbox"/> <i>Yes, Complex Pager, No E-Mail</i> -- number of mailbox, and the totals for all voice and fax messages received (urgent / new / saved). <input type="checkbox"/> <i>Yes, Complex Pager, E-Mail</i> -- number of mailbox, and the totals for all voice, fax, and e-mail messages received (urgent / new / saved). |
| Password Required | Check (✓) if a password must be entered before allowing access to the mailbox. |
| Allow Message Pickup | After the <i>Password Required</i> parameter is verified, the system will allow the "called party" to pick up any messages received. |



Locator Settings

The System Administrator controls if the Locator function is enabled on a per account basis under: System Admin > Accounts > Mailbox Settings > Locator.

Locator : 1003

Locator Allowed

Locator Time Rules Enabled

Locator Screen Callers

Locator Rules

The Locator is activated when a caller presses [5] while listening to a mailbox greeting. If the call matches a rule, the system will try to place the call according to that rule.

| Setting | Description |
|---------------------------|---|
| Locator Rule (1-9) | |
| Enabled | Check (✓) this setting to activate the date/time parameters. |
| Description | Enter a descriptive title for how and/or when a locator rule will be used. |
| Phone Number | Send a call to a user pre-defined number. |
| Date Start | Click on the calendar icon to select the "first day" the rule should be used. |
| Date Stop | Click on the calendar icon to select the "last day" the rule should be used. |
| Time Start | Enter the "earliest time" of day a rule may be used. |
| Time Stop | Enter the "latest time" of day a rule may be used. |
| Days Active | |
| Monday thru Sunday | Check (✓) each day the rule should be used. |

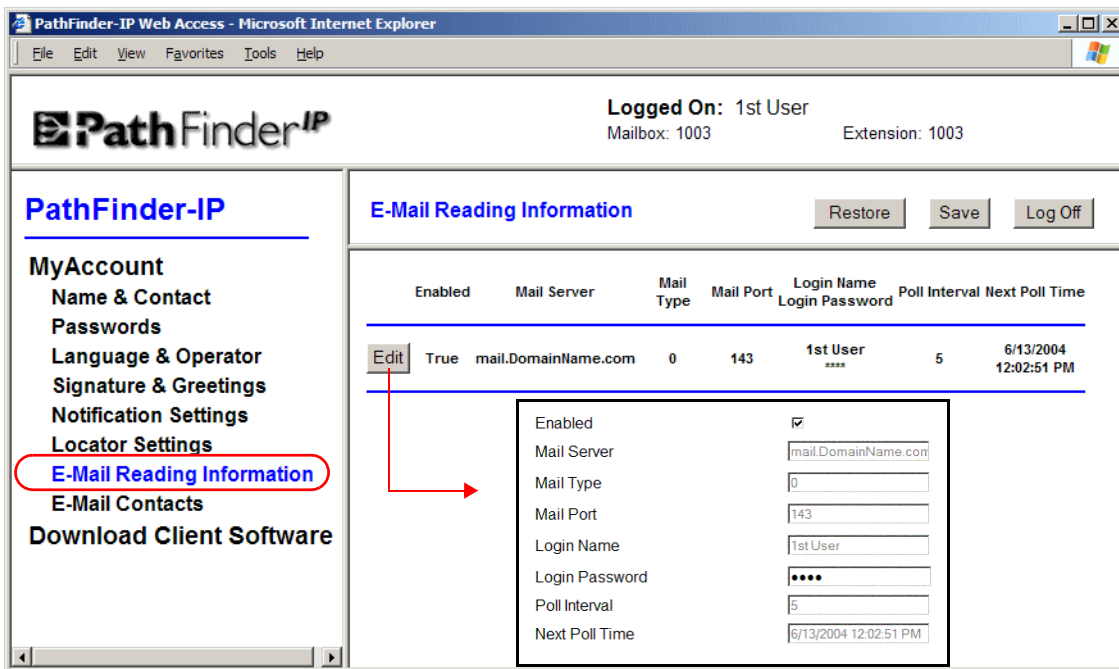
Optional - E-Mail Reading Information

DCC Client Program -- The E-Mail Reading and E-Mail Contacts pages are optional settings that will only be available if the DCC Client program has been enabled on the system software key.



- » The system allows a mailbox owner to listen to e-mails from inside their mailbox. This capability must be enabled by the System Administrator under: System Administration > Accounts > E-Mail Pickup Settings > Where to Get E-Mail.
- » Once the System Administrator adds the account, the user will be allowed to enable or disable this function, and change their Login Password.

E-Mail Reading Information



| Setting | Description |
|--------------------|--|
| | Click the [Edit] button to show the current e-mail settings for this account. |
| Enabled | Check (✓) this setting to activate the E-mail Pickup function for the account. |
| Login Password | Change the curent password for this account, as needed. |
| "Read Only" Fields | The following options are "view only" settings: Mail Server/ Type/Port, Login Name, and Polling. |

Optional - E-Mail Contacts

Each mailbox owner is permitted to set up a personal list of e-mail contacts. This “user only” list can be used to respond to e-mail messages received in this account.

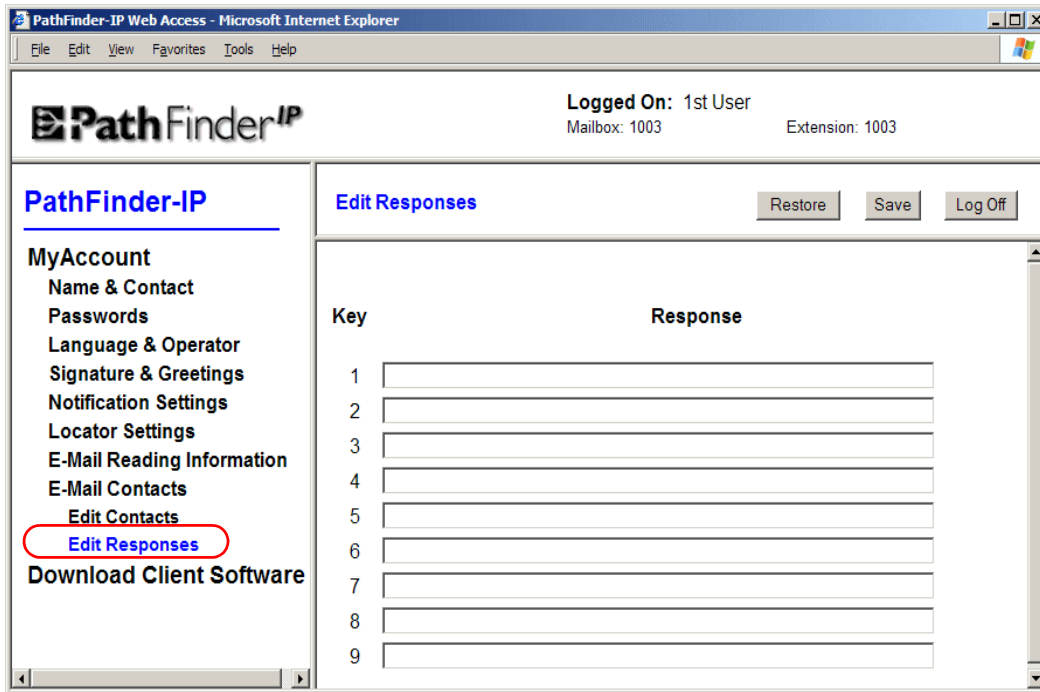
Edit Contacts



| Setting | Description |
|----------------|---|
| Add Contact | Set up the contact information to add to a personal list of contacts. |
| Edit | Modify the information previously entered for an existing contact. The Edit option will become available once a contact has been created. |
| Delete | Remove a contact entry that is no longer being used. The Delete option will become available once a contact has been created. |
| Last Name | Enter the last name of the contact. |
| First Name | Enter the first name of the contact. |
| Phone Number | Enter the phone number for this contact. This option can be used if the user wants to "call back" the contact in response to an e-mail message received. |
| E-Mail Address | Enter the e-mail address for this contact. This option can be used when sending or matching up received e-mails with this contact. |
| Priority | When requesting received e-mails, this field is used to determine the priority of the messages received from this contact. Values are 1-9 (where 1 is the highest). |

Edit Responses

Each user can set up nine (9) canned responses. These pre-defined text responses can be used to forward or reply to any e-mail received by the user.



KEYS 1 thru 9

| Setting | Description |
|----------|---|
| Response | When using canned responses to forward or reply to e-mails, enter a message to be associated with keys 1-9. |

Text-To-Speech Application -- When the "optional" *Text-To-Speech* program is enabled, the DCC Client will have access to these additional functions:

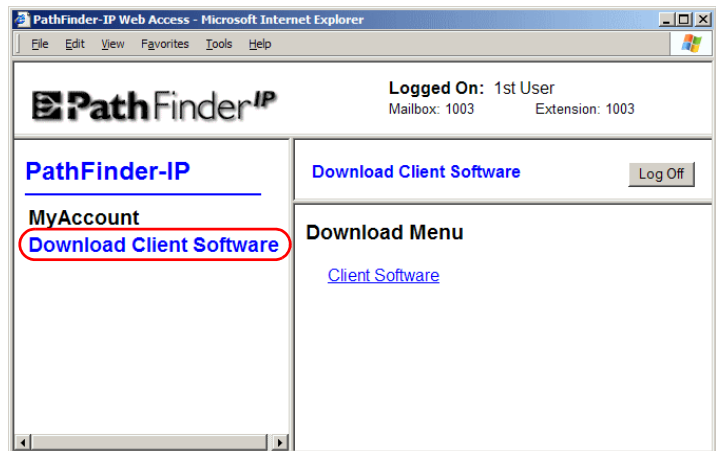
- » Listen to e-mail messages being read through their PC speakers
- » Send a predefined response to an e-mail message, from the desktop or the phone
- » Create a response and reply to e-mail & voicemail messages using a list of contacts
- » Have *PathFinder^{IP}* place a call using a phone number from a personal Contact List
- » For more "TTS" details, refer to *PathFinder^{IP} Optional Modules* manual

Download (DCC) Client Software

Optional - DCC Program Module

If the Desktop Call Control (DCC) program has been enabled on the software key, this section on the web will be available to all users that log in.

- » By clicking the "Client Software" link, the program that contains the DCC package and the VVM Player will be downloaded and installed on the user's PC.
- » To use this program, refer to *"Optional - DCC Desktop Program" on page 41* for the installation and operating instructions.



Mailbox Keypad Options

This section shows the options of the *PathFinder^{IP}* Voice Mail menu system designed to assist users control the messages received in their mailboxes.

- » *MESSAGE MANAGEMENT* -- For more information on message management options once a message has been selected, refer to "[Managing Messages](#)" on page 24.
- » *MAILBOX ATTEMPTS* -- When you access your mailbox to record or change a Signature or Greeting prompt, the system will allow you to make up to four (4) menu selections. If more than four (4) attempts are made, the *PathFinder^{IP}* will play a "callback later" message and terminate the call.

Example - If the owner calls into their mailbox, and: 1) records a greeting, 2) plays the greeting, 3) re-records the greeting, 4) plays the greeting, and then 5) plays the greeting again ... the system will play the prompt "Please check your information and call back" before disconnecting the caller.

Mailbox Menu Selections

MAIN MENU

- [1] Retrieve Messages
- [2] Send Messages
- [6] Extended Options
- [7] Admin
- [8] Personal Options
- [0] Transfer to a Mailbox or Extension

[1] Retrieve Messages

- [1] Play Again
- [2] Save
- [3] Delete
- [4] Forward
- [5] Reply
- [6] Extended Options (*during msg playback*)
- [7] Rewind (*during msg playback*) - "*Future Feature*"
- [8] Fast Forward (*during msg playback*) - "*Future Feature*"
- [8] Play Date and Time (*after msg plays*)
- [0] Play Envelope

-
- [1][6] Extended Options
 - [0] Call Back
 - [1] Go to Saved
 - [2] Pause
 - [3] Skip

[2] Send Messages

- [1] Send Message
- [2] Mark Urgent
- [3] Mark Private
- [4] Return Receipt
- [*] Cancel
- [#] Send Message
- [9] Send & Disconnect

[6] Extended Options

- [1] Change Extension Settings
- [2] Access Notepad

[6][1] Change Extension Settings

- [1] Set for Blind Transfer
- [2] Set for Supervised Transfer
- [3] Set Auto Forward
- [4] Set Do Not Disturb

[6][2] Access Notepad

- [1] Hear a Note
- [2] Add a Note
- [3] Delete a Note
- [4] Hear All Notes
- [5] Delete All Notes

[7] Admin

- [2] Edit Broadcast Message
- [3] Reset Mailbox Password
- [4] Recover a Mailboxes Deleted Messages
- [6] Record a Mailbox or System List Signature
- [7] Add a Mailbox
- [8] Delete a Mailbox

[7][2] Edit Broadcast Message

- [1] Hear Broadcast Message
- [2] Record a Broadcast Message
- [3] Delete a Broadcast Message
- [4] Hear ALL Broadcast Messages

[7][6] Record a Mailbox or System List Signature

- [1] Hear Name
- [2] Re-record
- [3] Delete

[8] Personal Options

- [1] Edit Greetings
- [2] Edit Password
- [3] Edit Signature
- [4] Delete Sent Message
- [5] Edit Locator
- [8] Edit Other Options

[8][1] Edit Greetings

- [1] Edit Standard Greeting
- [2] Edit Temporary Greeting
- [8] Edit Other Greetings
 - [1] Internal
 - [2] Busy
 - [3] No Answer
 - [8] Timed Greetings
 - [#] Edit Any Greeting (*#= 1 thru 9*)
 - [1] Play
 - [2] Record
 - [3] Delete
 - [4] Enable (*if allowed*)
 - [5] Disable (*if allowed*)
 - [6] Set Expiration Time (*Temporary Greeting only*)

[8][2] Edit Password

[8][3] Edit Signature

- [1] Play
- [2] Record
- [3] Delete

[8][4] Delete Sent Message

[8][5] Edit Locator

- [1] Enable Time Restrictions
- [2] Disable Time Restrictions
- [3] Edit Locator Items
 - [#] Edit Locator Item (*#= 1 thru 9*)
 - [1] Change Phone Number
 - [2] Enable Item
 - [3] Disable Item
 - [4] Delete Phone Number

[8][8] Other Options

[1] Notification

[#] Edit Notify Item (#=1 thru 9)

[1] Edit Phone Number

[2] Enable Notify Rule

[3] Disable Notify Rule

[4] Remove Time Restrictions

[5] Remove Message Restrictions

[2] Change Mailbox State

[1] Set Mailbox to Take Messages

[2] Forward Mailbox

[3] Edit Distribution Lists

[4] Edit Guest Mailbox

[3] Edit Distribution Lists

[1] Modify List

[1] Hear All Members

[2] Add a Member

[3] Delete a Member

[2] Create New List

[3] Delete List

[4] Hear All Lists

[7] Move Backward

[8] Move Forward

[4] Edit Guest Mailbox

[1] Hear Current Guest Mailboxes

[2] Add New Guest Mailbox

[3] Delete Guest Mailbox

[4] Change Guest Mailbox Password

[5] Record Guest Greeting

[6] Delete All Guest Mailboxes

Retrieving Messages [1]

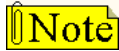
PathFinder^{IP} not only stores voice messages but can also be used to store and retrieve other types of messages.

MESSAGE TYPES -- *PathFinder^{IP}* will inform you of the number and type of new and saved messages stored in your mailbox.

- Voice Messages
- Pager (Beeper) Messages
- Fax Messages (with optional upgrades)
- E-Mail (with optional upgrades)

PLAYBACK ORDER -- When you retrieve messages, *PathFinder^{IP}* will play back all messages stored in your mailbox.

- Urgent messages are played back before new messages, and new messages are played back before saved messages.
- The order that saved messages are played back is determined by your System Administrator (usually ... first in, first out).



Systems with telephone integration may use message waiting lamps to notify you of new messages.

Voice Messages

Voice messages will be played in the following order:

- 1) Urgent 2) New 3) Saved

Retrieving a Voice Message

1. After logging in to your voice mailbox, press [1] to retrieve messages.
2. Then press [1] to retrieve *voice* messages.



Retrieval for a certain message type (e.g., voice messages) is only offered if that type of message has been left in your mailbox.

WHILE LISTENING -- *PathFinder^{IP}* offers three useful message control options that are active while listening to a voice message:

- [6] = Extended Options
- [7] = Rewind (*Future Feature*)
- [8] = Fast Forward (*Future Feature*)

EXTENDED OPTIONS -- Use these options to control how your messages are played back. Press [6] while listening to a message to hear the following message options:

- [0] = Call Back Place a call back to the party that left a voice message
- [1] = Save Move to saved messages to play at a later time
- [2] = Pause Put message temporarily on hold
- [3] = Skip Proceed to next message

Pager Messages

In addition to voice messages, you may receive and store pager messages in your mailbox.

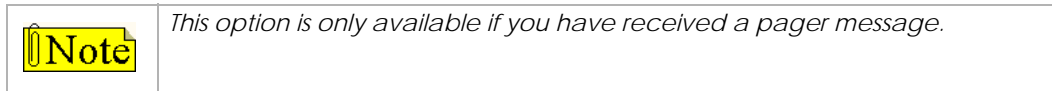
- When someone leaves a pager message, *PathFinder^{IP}* records the numeric information.
- When you retrieve a pager message, *PathFinder^{IP}* plays back the phone number.

NOTIFICATION -- You can set up *PathFinder^{IP}* to call your paging company when you have new pager messages. Depending on how your System Administrator configures your implementation, you can be notified on your pager with either your *PathFinder^{IP}* mailbox number or the pager message itself.

Refer to "[Notification Options](#)" on page 36 for details on setting up your mailbox for message notification through an outside number, such as a pager.

Retrieving a Pager Message

1. After logging in to your voice mailbox, press [1] to retrieve messages.
2. Press [2] to retrieve any pager messages you may have received. When selected, the system will repeat the retrieve option number.



Fax Messages

If *PathFinder^{IP}* supports the "optional" Fax On Demand program, your voice mailbox can also be used to receive and store fax transmissions.

Fax messages can be printed on any fax machine, making it possible to retrieve a fax message from virtually any telephone, anywhere.

Retrieving a Fax Message

1. After logging in to your voice mailbox, press [1] to retrieve messages.
2. Press [3] to retrieve any fax messages you may have.
(If you have ONLY fax messages, *PathFinder^{IP}* will go directly to the fax retrieval menu.)
3. If you have new fax messages, you will be able to select one of the following:

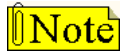
| | |
|--|-----------------------------------|
| [1] = Send new fax msgs to a fax machine | Stores sent e as saved messages |
| [#] = Retrieve fax msgs one by one | Puts messages temporarily on hold |

The following options will be available for each fax message until you delete them from your mailbox:

- [1] = Replay fax statistics
- [2] = Save fax message
- [3] = Delete fax message
- [4] = Forward fax message
- [5] = Send fax message to a fax machine
- [6] = Skip message

Managing Messages

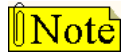
PathFinder^{IP} allows you to manage your messages during or after message playback.



After a message has been saved or deleted, the other message options are no longer available for that message.

The following options are available while reviewing messages:

- [1] = Replay the current message
- [2] = Save the message
- [3] = Delete the message
- [4] = Forward the message to another mailbox
- [5] = Reply to a voice message or send to a fax machine
- [6] = Listen to extended options "during message playback"
- [7] = Rewind message "during message playback" - (*Future Feature*)
- [8] = Fast forward message "during message playback" - (*Future Feature*)
- [8] = Play message date and time "after message plays"
- [0] = Play envelope



To conserve the valuable space in your mailbox ... remove saved messages when no longer needed.

Forwarding Messages

The *PathFinder^{IP}* will allow you to pass voice, page, and/or fax messages to other mailbox owners.

Forwarding a Message

1. After logging in to your voice mailbox, press [1] to retrieve messages.
2. Review a message, then press [4] to forward the message.
3. Select from the following forward options:
 - [1] = Forward message as is
 - [3] = Cancel message forwarding

Selecting a Destination

You can forward a message to a known mailbox number or to another destination (a guest mailbox, distribution list, outside number, or unknown mailbox number).

To forward message to known mailbox number:

Enter the mailbox number and press [#] to confirm the entry.

To forward message to unknown mailbox number (or to select another type of address)

1. Press [*] and choose one of the following forward options:
 - [*] = Forward to a mailbox based on the spelling of the mailbox owner's name
 - [5] = Forward to a system list
 - [6] = Forward to an outside telephone number
 - [7] = Forward to a personal distribution list (refer to "[page 38](#)")
2. After selecting the forwarding destination, press [#] to confirm.

Replying To Messages

Use the reply feature to respond directly to another *PathFinder^{IP}* mailbox owner who has left you a message. You do not have to enter the original sender's mailbox number when you send your reply. If a response is not permitted, *PathFinder^{IP}* will inform you that you cannot reply to this type of message.

Sending a Reply

1. After logging in to your voice mailbox, press [1] to retrieve messages.
2. Review a message, then press [5] to reply to the message.
3. Press [#] to confirm the reply option (or [*] to cancel).
4. Record your reply, when finished, press any key to continue.
5. When prompted, select from the following options:
 - [1] = Send your reply and remain in *PathFinder^{IP}*
 - [2] = Hear/Review your reply
 - [3] = Cancel the reply
 - [4] = Re-record your reply

Stamping Messages with Time & Date

PathFinder^{IP} automatically attaches time and date information to each new message. You can hear this information at any time while a message is active (either during or after playback).

Listening to Time/Date Stamp

1. After logging in to your voice mailbox, press [1] to retrieve messages.
2. Review a message.
3. To hear the time and date the message was received in your mailbox, you can perform one of the following playback options.

While message is playing ... press [*] to interrupt message playback, then press [8] to hear time/date stamp,

-or-

After message has finished playing ... press [8] to hear time & date.

MESSAGE GUIDELINES

Message Statuses -- If you hang up without deleting or saving a message, it is automatically saved in the same state as when you logged on to the mailbox (e.g., a new message will still be registered as a new message).

Retention Period -- *PathFinder^{IP}* automatically deletes saved messages after a certain period of time, called the retention period. Messages are typically retained by *PathFinder^{IP}* for one week. Ask your System Administrator to determine your message retention period.

Automatic Forwarding -- Messages can automatically be forwarded to another *PathFinder^{IP}* mailbox or to another extension. This can be useful in situations where you will be away for an extended period of time and you want someone else to monitor your messages. Refer to "[Mailbox State](#)" on page 37 for details on forwarding options.

Sending Messages [2]

PathFinder^{IP} provides you with the ability to communicate with other people even when they aren't available. You accomplish this by sending a message directly to the person's mailbox.

Sending Voice Messages

Once you record a message and select the destination, you will be able to indicate the status of the message and when it should be sent.

Recording a Message

1. After logging in to your voice mailbox, press [2] to send a message.
2. Record your message, then select one of the following options.
 - [1] = Send
 - [2] = Hear/Review your message
 - [3] = Cancel
 - [4] = Append to (pick up at the end of what you have already recorded)
 - [5] = Re-record (erase what you have already recorded and re-record a new message from the beginning)



If you append or re-record your message, you must press [1] to send the message before you can go on to the next step.

After recording your message, you are ready to send it.

Selecting a Destination

1. To choose a destination for a message, select one of the following address options:
 - a. Enter a mailbox number, then press [#] to confirm mailbox number,
-or-
 - b. Press [*] to select one of the other address options:
 - [*] = A mailbox based on the spelling of the owner's name
 - [5] = A system list
 - [6] = A phone number outside your *PathFinder^{IP}* system
 - [7] = A personal distribution list (refer to "[page 38](#)")
2. Select one of the following send options:
 - [#] = Send message as is
 - [*] = Re-enter the mailbox number
 - [3] = Cancel
 - [6] = Send Options
3. To send message to more addresses, repeat this procedure (starting with Step 1).
4. When you have sent the message to all desired destinations, press [#].

Send Options

If you press [6] while in the Send Options menu, you can choose one of the following Message Options to designate how and when to send your message:

- | | |
|------------------------|---|
| [1] = Private | Prevents message from being forwarded |
| [2] = Urgent | Moves message to front of message queue |
| [3] = Cancel | Terminates your message selections |
| [4] = Confirm Delivery | Repeats these options to allow further selections |
| [5] = Future Delivery | Sends messages at a future date or time |

CONFIRM DELIVERY -- If you select [4] from the Message Options menu, the message options will be repeated to allow you to make additional selections.

FUTURE DELIVERY -- If you select [5] from the Message Options menu to request future delivery of your message, complete these steps:

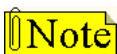
1. Enter the date for delivery.
2. Enter the time for delivery.
3. Indicate a.m. or p.m. for the time you entered:
 - [1] = a.m.
 - [2] = p.m.

Extended Options [6]

Extended options provide control over certain extension settings, which control how *PathFinder^{IP}* transfers calls to your extension. Other extension options are used to turn call screening and caller holding on and off. You can also access the personal voice Notepad from the Extended Options menu. The personal Notepad can be used to store and retrieve information over the telephone.

Changing Extension Settings

Extension settings options let you select how a call is processed when transferred to your extension. The default setting for this option is "Blind Transfer".



If your *PathFinder^{IP}* implementation has telephone integration, **do not** change transfer options without consulting your System Administrator.

Call Processing Options

1. After logging in to your voice mailbox, press [6] to change extended options.
2. Press [1] to edit extension settings.

The following options are available:

- [1] = Blind Transfer
- [2] = Supervised Transfer
- [3] = Set Auto Forward
- [4] = Set Do Not Disturb

Supervised Transfer Options

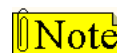
If you select Supervised Transfer as your extension setting, *PathFinder^{IP}* offers the following additional options:

- [1] = Call Screening only
- [2] = Call Holding only
- [3] = Both Call Screening and Call Holding
- [#] = Neither Call Screening nor Call Holding

CALL SCREENING -- Prior to transferring a call to your extension, *PathFinder^{IP}* asks the caller to say their name. *PathFinder^{IP}* then rings your extension and prompts you with the message, "Your Caller is <Person's Name>." After you hear the caller's name, *PathFinder^{IP}* will provide the following options:

- Accept the call
- Reject the call (sends the call to your mailbox)
- Send the call to another extension
- Send the call to another mailbox
- Hear the person's name again

CALL HOLDING -- *PathFinder^{IP}* informs the caller that your line is busy and asks if they want to hold, transfer to a different extension, or leave a message.



Call holding and call screening may be disabled by the System Administrator.

Using Personal Notepad



For an account to use the Notepad feature, the System Administrator must first enable this function under: System Administration > Accounts > Voice Mail Pickup > Owner Edit Options.

Selecting the personal Notepad gives you access to the *PathFinder^{IP}* programmable voice database. The Notepad records any kind of information that you want to retrieve at a later time.



The amount of information that each group can store is only limited by the amount of available disk space.

Setting Up a Group & Keyword/ID

1. After logging in to your voice mailbox, press [6] for extended options.
2. Press [2] to access the personal Notepad.
3. Press key [1] thru [8] for any unused group number.
4. Press [#] to confirm that you want **to create a group**.
5. Record a description for the group (e.g., "Customer Accounts"), then press [#] when finished recording. You have now created and named a group.
6. Select the number for the group you just created, then enter a new keyword/ID for the first entry in this group, and press [#]. (Keywords/IDs can be any combination of keys from [0] to [9], and up to eight digits in length.)
7. Press [#] to record the entry for that keyword/ID, then press [#] when finished. To record any other keyword/ID entries for this group, complete Steps 7 and 8.
8. Press [#] once to return to the group selection menu, twice to return to the Extended Options menu, or three times to return to the main menu.

Editing Group/ID Entries

1. After logging in to your voice mailbox, press [6] for extended options.
2. Press [2] to access the Notepad.
3. Press a key for any existing group number, from [1] through [8].
4. To **edit a group**, select one of the following options:
Change group description = [1] + [*]
Delete group and all IDs = [3] + [*]
5. To review or **edit a keyword/ID**, enter the keyword/ID for the desired entry in a group, then press [#]. The system will play the selected entry.
6. You can then choose from the following options:
[1] = Review the ID entry
[2] = Re-record the ID entry
[3] = Delete the ID entry
[4] = Append to the ID entry
[#] = Return to previous menu

Admin [7]



The Admin mailbox menu allows the System Administrator to control system broadcast messages and to administer individual mailboxes.

Editing Broadcast Messages [7 + 2]

Broadcast Message Administration puts a broadcast message into a mailbox. By default, a broadcast message goes to every user in the voicemail system. Broadcast Message Administration plays a currently recorded broadcast message or a new one. A system can have up to ten broadcast messages (0-9).

Broadcast messages are different from distribution lists in the following ways:

- Broadcast messages use less disk space.
- A broadcast message automatically enters a user's mailbox. It plays automatically when a user goes into their mailbox; the user need not retrieve it.

This prompt plays: "You have x broadcast messages active."

Modifying broadcast messages allows the System Administrator to re-record default system prompts. The options are as follows:

- [1] Hear Broadcast Message
- [2] Record a Broadcast Message
- [3] Delete a Broadcast Message
- [4] Hear ALL Broadcast Messages

Press [1] ... to Hear Broadcast Message

This option plays an existing broadcast message, followed by these prompts:

"Active broadcast messages are: ..."

"Select the message number to play. To repeat selections press [*]. When finished, press [#]."

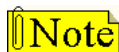
[*] repeats the selections, [#] returns to Broadcast Message Administration.

Entering a message number plays that message, then returns to Broadcast Message Administration.

Press [2] ... to Record a Broadcast Message

This option allows the Administrator to edit the following prompts and signatures:

- Menu Prompts are played during options processing. A caller hears this prompt instructing them on what keys to press for an option.
- System Prompts are generic prompts for basic system functions, such as the voicemail instruction prompt or the auto attendant instruction prompt. These prompts can be customized.
- Mailbox Signatures are the recorded names associated with a particular mailbox.



If the prompt does not exist, the only option available is to record a new one. If the prompt does exist, it can be played, re-recorded, or deleted.

Press [3] ... to Delete a Broadcast Message

This option cancels a broadcast message that has already been distributed, followed by these prompts:

"Active broadcast messages are..."

"Select the message number to delete. To repeat selections, press [*]. When finished, press [#]."

[*] repeats the active messages, [#] returns to Broadcast Message Administration.

Entering a number to delete plays: "Delete broadcast message number x. To confirm deletion, press [#]. To abort, press [*]."

[*] plays: "Broadcast message not deleted."

[#] plays: "Broadcast message deleted."

[#] returns to Broadcast Administration.

Press [4] ... to Hear all Broadcast Messages

This option plays all active broadcast messages, followed by these prompts:

"To repeat messages, press [*]."

"When finished, press [#]."

[*] repeats the active messages, [#] returns to Broadcast Message Administration.

Modifying Mailbox Settings

Mailbox Administration resets mailbox passwords, creates new mailboxes and deletes mailboxes. With this option, the Administrator can control and change the user's mailbox actions.

[3] Reset Mailbox Password

[4] Recover a Mailboxes Deleted Messages

[6] Record a Mailbox or System List Signature

[7] Add a Mailbox

[8] Delete a Mailbox

Reset Mailbox Password [7 + 3]

This option lets the Administrator reset the mailbox password in the event that a password is forgotten.

- » Press [7] + [3] and enter the mailbox number followed by [#]. The system plays the current password.
 - "To leave password as entered, press [#]."
 - "To change, enter new password followed by [#]."
- » When the password is changed, the system plays: "The new password is xxxx, press [#] to confirm or [*] to cancel."
- » If the password is not changed, the system plays "password has not been changed" and returns to the previous level.

Recover a Mailboxes Deleted Messages [7 + 4]

Recover a Mailboxes Deleted Messages provides deleted message recovery before system clean up occurs which occurs nightly. These prompts play:

- » Press [7] + [4] ... enter the mailbox number, and press [#] when finished.
To recover messages for a particular mailbox, enter the mailbox number followed by [#]. To go back, press [#]
- » If the mailbox has no deleted messages, the system plays:
"No deleted messages were found for mailbox nnn". (nnn is the mailbox number.)
- » If the mailbox has deleted messages, the system plays:
X deleted messages were found for mailbox nnn (where nnn is the mailbox number and X is the number of deleted messages.)
Press [#] to go ahead with message recovery. Press [] to skip recovery.*
Pressing [*] plays Mailbox Administration. When [#] is pressed, the system plays:
"Messages are being recovered" and returns to the previous level.

Record a Mailbox or System List Signature [7 + 6]

- » Press [7] + [6] ... to access the following Signature options:
[1] Hear Name
[2] Re-record
[3] Delete

Add a Mailbox [7 + 7]

This option adds a mailbox to the system. Use this option when adding a new user to the *PathFinder^{IP}* system.

- » Press [7] + [7] ... enter the new mailbox number, and press [#] when finished.
These prompts play:
"Enter the mailbox number to add followed by [#]. Press [#] to go back."
"Enter the mailbox number followed by [#]."
The system plays: Mailbox was added and returns to the previous level.



A template mailbox must have been defined in the registry. Registry items are changed from Laptop/PC Administration.

Delete a Mailbox [7 + 8]

This option removes a mailbox from the system.

- » Press [7] + [8] ... enter mailbox number to remove, and press [#] when finished.
These prompts play:
"Please enter the mailbox number to delete followed by [#]."
"Enter the mailbox number followed by [#]."
The system plays:
You have selected to delete mailbox xxx. Press [#] to confirm or [*] to cancel.
If [#] is pressed, system plays: "Mailbox was deleted" and returns to MB Admin.
If [*] is pressed the system plays: "Mailbox will not be deleted" and returns to Mailbox Administration. Press [#] to return to System Administration.

Personal Options [8]

Mailbox Greetings

The mailbox greeting is a message from you that callers hear when they reach your mailbox. It usually tells callers that you are not available and instructs them to leave a message. *PathFinder^{IP}* supports three types of greetings as described.

STANDARD GREETING -- The standard greeting is a generic greeting played when your mailbox is reached by a caller. A typical standard greeting might sound like this:

"You have reached Beth Williams. Please leave your name, number, and a short message, and I'll get back to you."



When recording your greeting, you can review and edit it until you are satisfied with how it sounds.

TEMPORARY GREETING -- A temporary greeting can be used to inform callers that you will be away from your desk or out of the office for an extended period of time.

Recording a Greeting

1. After logging in to your voice mailbox, press [8] to change personal options.
2. Press [1] to edit greeting.
3. Select the greeting to edit:
 - [1] = Standard Greeting
 - [2] = Temporary Greeting
 - [8] = Other Greetings (refer to ["Other Greetings" on page 34](#))
4. Edit the greeting, using the following menu options:
 - [1] = Hear Greeting
 - [2] = Re-Record the Greeting
 - [3] = Erase the Greeting
 - [4] = Activate (Temporary or Other Greetings only)
 - [5] = Deactivate (Temporary or Other Greetings only)

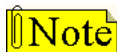


To deactivate your Temporary Greeting, erase it. If you erase your Standard Greeting, a default system greeting (giving your mailbox number) plays for callers.

Other Greetings

You can customize your greeting based on the following parameters:

- | | |
|--------------------------------|--|
| [1] = Internal Greeting | heard only by other <i>PathFinder^{IP}</i> users when they reach your mailbox. |
| [2] = Busy Greeting | plays only while you are using your phone and Supervised Transfers have been enabled. |
| [3] = No Answer Greeting | plays only when you are unable to answer your phone. |
| [4] = Time Sensitive Greetings | used to assign different greetings to different time periods. |



Not all PathFinder^{IP} implementations support internal greetings. Consult your System Administrator for more information.

TIME SENSITIVE GREETINGS -- This type of greeting can be set to play during certain *PathFinder^{IP}*-defined time periods, such as:

- Different times during the day
- After hours
- Weekends
- Holidays

Time periods are set by your System Administrator. To find out what time settings are available, contact your System Administrator.

Password Selection

To keep your messages confidential and prevent unauthorized use of your mailbox, use a mailbox password. Passwords are typically four-digit numbers. If you forget your mailbox password, your System Administrator can reset it for you.

A password should be easy to remember, but not easy for someone else to discover.

- The last four digits of your best friend's home phone number or your favorite relative's birth date ARE good passwords.
- Consecutive or duplicate numbers are NOT good passwords.
Example ... [1] + [2] + [3] + [4] or [5] + [5] + [5] + [5].
- Using the keypad to spell out a word that is meaningful only to you also works well.

Editing Your Password

1. After logging in to your voice mailbox, press [8] to change personal options.
2. Press [2] to edit mailbox password.
3. Choose from these options when editing your mailbox password:
 - [1] = Review password
 - [2] = Record a new password

Edit Mailbox Name

Recording your name provides a personalized identity for your mailbox. When callers leave messages, they hear something similar to the following: "Message has been sent to Jeff Brown." This confirms that messages have been sent to the correct person.

If a name is not recorded for a mailbox, callers will hear the following: "Message has been sent to Mailbox 1234."

Editing Mailbox Name

1. After logging in to your voice mailbox, press [8] to change personal options.
2. Press [3] to edit mailbox name.
3. Choose from these options when editing your mailbox name:
 - [1] = Hear the current mailbox name
 - [2] = Record a new mailbox name

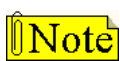
Delete Sent Messages

You have the option of deleting a message that you have sent, as long as the message has not yet been saved or deleted.

Deleting a Sent Message

To delete a message that has been sent, perform the following steps:

1. After logging in to your voice mailbox, press [8] to change personal options.
2. Press [4] to delete sent messages.
3. Enter mailbox number where you sent the message and press [#].



You can leave messages untouched by pressing only [#] (without entering a mailbox number first).

4. As *PathFinder^{IP}* plays each sent message, press either [#] to retain the message or [3] to delete it.
If you press [3] to delete a message ... you must then press either [#] to confirm deletion or [3] to abort deletion.

Other Options [8]

As a mailbox owner, you will be able to control certain additional options and features. By accessing your mailbox, you can change “other” personal options

Once you are in your mailbox, you will be able to select one of the following Other Options (8) from the Personal Options menu (8):

- [1] = Alter message notification settings
- [2] = Change mailbox state
- [3] = Edit personal lists
- [4] = Administer guest mailboxes

Notification Options

Message notification instructs *PathFinder^{IP}* how and where to contact you when a new message is received. This can include sending notification by dialing an alternate telephone number, or by activating a paging device.

If you are unavailable, *PathFinder^{IP}* will periodically redial the notification number until you receive the message. This number can be an internal extension, outside phone number, or digital pager.



You can access your messages manually at any time. However, you may want to activate Notification if you are expecting an important message or plan to be out of the office at an unusual time.

Changing Message Notification

1. After logging in to your voice mailbox, press [8] to change personal options.
2. Press [8] to edit Other Options.
3. Press [1] to change Notification.
4. Select from these options when altering message notification:

- | | |
|--|--|
| [1] = Listen to the current mailbox settings | Tells you what the current notification settings are. |
| [2] = Turn notification off | Disables this feature. <i>PathFinder^{IP}</i> does not notify you of new messages. Only available if notification previously has been activated. |
| [3] = Immediately notify of new messages | <i>PathFinder^{IP}</i> notifies you immediately of new messages. Only available if notification has been turned off. |
| [4] = Enter a specific notification time | Sets a time at which <i>PathFinder^{IP}</i> notifies you of new messages. |
| [5] = Set notification to an outside number | Sets the number where <i>PathFinder^{IP}</i> can attempt to reach you to deliver messages. |



*Do not set the notification number to your own extension number! Otherwise, *PathFinder^{IP}* may leave countless messages in your mailbox telling you that you have new messages.*

Mailbox State

The mailbox state determines how *PathFinder^{IP}* processes a call when someone tries to leave a message. Typically, *PathFinder^{IP}* plays your personal greeting and prompts the caller to leave a message. However, several other options allow the call to be processed in different ways.

To Change a Mailbox State:

1. After logging in to your voice mailbox, press [8] to change personal options.
2. Press [8] to edit Other Options.
3. Press [2] to change the mailbox state.
4. Choose from these options when changing your mailbox state:

| | |
|------------------------------------|---|
| [1] = Turn greeting off | Takes a message without playing a mailbox greeting. This is available only if greeting is currently turned on. |
| [2] = Turn greeting on | Plays mailbox greeting before taking a message. This is available only if greeting is currently turned off. |
| [3] = Take messages in the mailbox | Cancel any forwarding options and begin recording messages in the mailbox. |
| [4] = Forward to a mailbox | Transfers the call to a mailbox (not an extension) other than your own. |
| [5] = Forward to an extension | Transfers the call to another person's extension instead of leaving a message in your mailbox. |
| [6] = Forward to a menu | Transfers the caller to a custom-designed menu. Contact your System Administrator about forwarding calls to a menu. |
| [7] = Forward to a module | Transfers the caller to a specific module. Contact your System Administrator about forwarding calls to a module. |
| [8] = Turn mailbox off | Disables the mailbox. Caller hears: "This mailbox is not available. Press [1] to try another mailbox or [0] for an operator." |

Personal Distribution Lists

PathFinder^{IP} provides the ability to automatically send a message to more than one person through the use of distribution lists. *PathFinder^{IP}* recognizes two kinds of distribution lists:

System Lists -- are created and administered by your System Administrator. You as a mailbox owner can use these lists, but you cannot create or modify them. Typically, system lists are created for groups of people, such as a company department, where more than one person will use the list to reach the entire group.

Check with your System Administrator to find out what system lists are available or to request that a system list be created.

Personal Lists -- are similar to system lists, differing only in that they are created and maintained by individual users.

Guidelines

- » Each mailbox owner can have up to 10 personal lists. List numbers correspond to the keys on the telephone keypad ... [0] through [9].
- » Each personal lists may contain up to twenty-five mailboxes and/or outside numbers.
- » Messages are recorded and sent like any other message and may have delivery options such as confidential, priority, and the like.

To Set Up a Personal List:

1. After logging in to your voice mailbox, press [8] to change Personal Options.
2. Press [8] to edit Other Options.
3. Press [3] to edit Personal Lists.
4. These options are available when editing personal lists:
 - [1] = Review or modify a list
 - [2] = Create a new list
 - [3] = Delete a list

If reviewing or modifying a list ... enter the list number that you want to edit, then select from the following edit options:

- [1] = Hear entries
- [2] = Add a new entry
- [3] = Delete an entry

Guest Mailboxes

Guest mailboxes can be created for those individuals who do not have their own permanent *PathFinder^{IP}* mailbox. Guest mailboxes are especially useful for customers, vendors, or others with whom there is frequent communication. Guests can receive messages from the person who has created the mailbox, and also send a reply.

GUIDELINES

- ❑ As a mailbox owner, you can create up to 10 guest mailboxes and leave up to 10 messages for each guest.
- ❑ If an eleventh message is sent, the oldest message in the guest mailbox is automatically deleted.
- ❑ A guest on *PathFinder^{IP}* can only leave a reply in the guest mailbox if the mailbox owner has left a message for the guest. Otherwise, they leave messages in the standard manner.
- ❑ Guest mailboxes may be deleted if not needed.

MAILBOX OWNER OPTIONS -- Mailbox owners have the following options when working with guest mailboxes:

- ❑ Messages may be forwarded to a guest mailbox
- ❑ Messages may be replied back to a guest mailbox
- ❑ Guest mailboxes may be included in personal lists


The owner's standard mailbox greeting should reflect the availability of any guest mailboxes. A typical greeting might be as follows:

"You've reached Beth Williams. If you think I might have left you a personal message, press [4], then enter the last four digits of your phone number."

(This message assumes that you used the last four digits of a caller's phone number to designate the guest mailbox numbers).

RECORD GUEST MAILBOX GREETING -- Managing your guest mailboxes is your responsibility as the mailbox owner.

- ❑ A mailbox greeting replaces the standard system greeting so that each mailbox owner can personalize their message.
- ❑ In order to leave messages for your guests, you must first record a guest mailbox greeting.
- ❑ Only one greeting is heard for *ALL* your guest mailboxes.
- ❑ Once a guest mailbox greeting is recorded, you can create a guest mailbox.

| | |
|---|--|
|  Note | <i>You must create a guest mailbox before trying to leave a message in it.</i> |
|---|--|

Editing a Guest Mailbox

1. After logging in to your voice mailbox, press [8] to change Personal Options.
2. Press [8] to edit Other Options.
3. Press [4] to administer Guest Mailboxes.
4. When prompted, select from these guest mailbox options:
 - [1] = List current guest mailboxes & number of messages in each
 - [2] = Create or modify a guest mailbox
 - [3] = Delete a guest mailbox
 - [4] = Edit guest mailbox greeting

Leaving a Message

1. After logging in to your voice mailbox, press [2] to send a message.
2. Record your message, then press [#] when you are finished.
3. When you are satisfied with your message, press [1] to send it.
4. Press [*] to send to other addresses.
5. Press [4] to send to a guest mailbox.
6. Enter the appropriate guest mailbox number, then press [#].

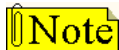


There is no verification given after entering the guest mailbox number. Be sure to enter the correct mailbox number.

Retrieving a Message

Once a guest mailbox has been created, guests can retrieve messages by calling *PathFinder^{IP}* and logging on to your mailbox.

1. While listening to the mailbox owner's greeting, the caller presses [4].
2. The caller is prompted for the guest mailbox number. The guest then enters the mailbox number followed by [#].
3. *PathFinder^{IP}* plays any messages stored in the guest mailbox. A guest can then replay, or reply to any message left in the guest mailbox.



Guests are not allowed to save messages.

ACCESS TO GUEST MAILBOX -- A guest cannot send a message from a guest mailbox if there are no messages from the mailbox owner waiting in the guest mailbox.

Access to the guest mailbox is granted only if the mailbox owner has left a message for the guest. Otherwise, *PathFinder^{IP}* allows the guest to record a message for the owner's mailbox just as it would allow any other caller to record a message.

Optional - DCC Desktop Program

Introduction

This section is a guide to assist the System Administrator and the Desktop Client with the DCC Client Optional Module using the *PathFinder^{IP}* application.

The Client Desktop module allows a Client (user) to take control of their mailbox settings through their personal computer, or using a telephone from a remote location.

Other Optional Programs

» The optional *Text-to-Speech* application allows a client to hear e-mail messages read through a PC or telephone.

» The optional *Unified Messaging* application allows a client to listen to voice mail messages through a PC.

General Description



Desktop Call Control (DccClient) ... used to interact with calls

The DCC program allows an inbound call that is coming through the Vodavi Voice Mail system's auto-attendant to "pop" a screen and present call handling options to the Client on their desktop.



DCC Configuration Utility (DccConfig) ... used to modify call settings

The Client will use this application to set up and modify these user desktop functions:

- » Program Settings - *General* tab
- » Sound Files - *Alerts* tab
- » Call Handling Instructions - *Actions* tab
- » User-Defined Access Buttons - *Buttons* tab
- » Personal List of Addresses - *ACH Contacts* tab
- » Mailbox Voice Messages - *Prompts* tab



Vodavi Voice Messaging (VVMPlayer)... used to respond to voice messages

With an e-mail interface (*Microsoft Outlook*) and a good-quality microphone, the Client can use the VVM program to create and respond to voice messages at their desktop.

When used in conjunction with the optional *Unified Messaging* module, the sound card installed on the Client PC will allow them to hear voicemail messages through their PC speakers.

Optional - DCC Desktop Program

Admin - DCC Web Settings



The System Administrator controls user access to the DCC functions on a per station basis. Use this Menu/Settings table as a guide to ensure that the necessary parameters have been modified or enabled.

| System Admin Menus | DCC Settings | Description |
|--|---|--|
| Accounts / Extension Setting / Desktop Call Control | DCC Allowed Desktop Activated Send Busy Calls to DCC Send No-Answer Calls to DCC | These settings allow the client to maintain their own call parameters. |
| Accounts / Desktop VM Settings | POP3 DELE Saves POP3 Show Saved Audio Attach Format SMTP Push Enabled SMTP Push Address | |
| DCC Manager Settings | TCP/IP Communications Port Heartbeat Interval (Mins) DCC Client Timeout (Secs) | Port that the DCC Switchboard listens on Time between validation processes Time to wait for client response before connection is dropped |
| E-Mail to Voice Mail Converter (TTS) Voice Mail to E-Mail Converter (UM) / Audio Settings | VVM Default | Setting must be enabled if VVM Player will be used. |

Server Programs Required

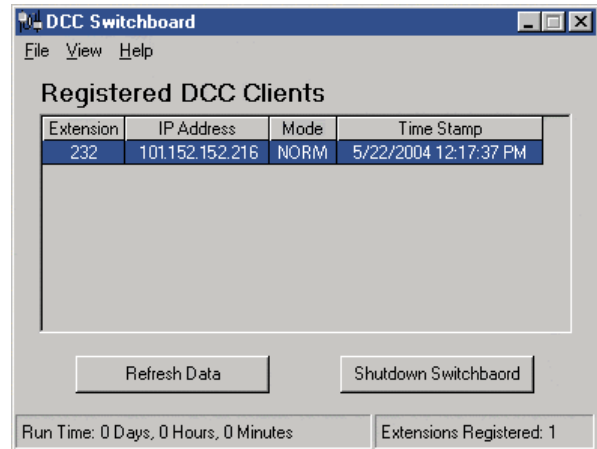
For the Client PCs to access their DCC program, the DCC Switchboard application **must be running**.

- » If this programs were placed in the Programs > Startup group during the installation process, they will open automatically whenever the Server PC is restarted.
- » You can manually open these Server programs by clicking the Windows *Start* menu, and then selecting Programs > *PathFinder^{IP}*.

DCC Switchboard

The DCC Switchboard server program functions as follows:

- » Each time a Client logs in, the Switchboard will verify license and signon information before allowing access to the DCC application.
- » In you should need to shutdown the DCC Switchboard, from this screen you will be able to see which users are logged in.
- » The system will update this DCC Client information at 15-minute intervals. Use the "Refresh Data" button to view the current status.



DCC Switchboard Configuration

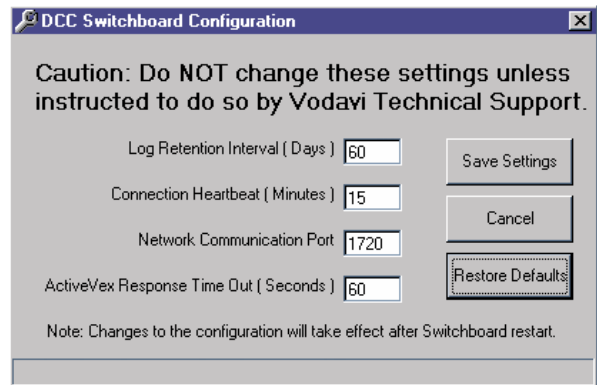
This window is used to define advanced system parameters. These settings are in the *File* menu and should only be changed under direction of Vodavi Technical Support.

Log Retention Interval -- Determines how many days of old log files should be saved. Default = 60 days

Connection Heartbeat -- Determines how often DCC Client connections should be validated. Default = 15 minutes

Network Communication Port -- Determines which port the Switchboard will communicate on for TCP and UDP protocols. Default = 1720 for both protocols

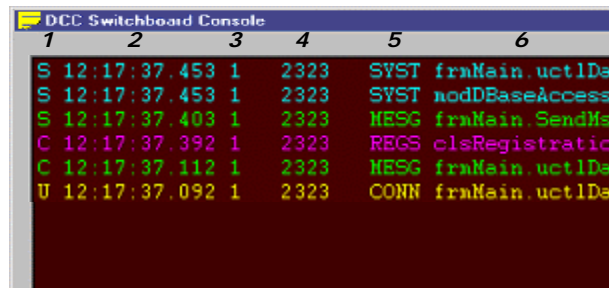
ActiveVex Response Timeout -- Determines the interval that the AvDcc module will use to generate holding call confirmation prompts. Default = 60 seconds



DCC Switchboard Console

The Console window displays logged system data in real-time. This can be helpful if you are having trouble with DCC or if you just want to watch the system activity.

The Logged entries are color-coded for your convenience. In order to control the level of detail in the log file and the console, change the logging level via the *View* menu.



Color Code
 Yellow = Connection oriented events
 Red = Errors
 Cyan = System messages
 Green = TCP/IP msg traffic
 Magenta = DCC Registration

Field Key
 1 = Source of entry: S-Switchboard, C-DCC Client, U-Unknown
 2 = Timestamp of entry
 3 = Connection ID
 4 = Extension
 5 = Log Type
 6 = Log Message

Client - DCC Download & Installation

Before You Begin

Prior to installing the DCC program, make sure your Voice Mail system and the PCs of the clients that plan to use the Desktop application meet the following requirements before proceeding.

System Requirements

- ✓ Vodavi *PathFinder^{IP}* Voice Mail software release 9.0 or higher is installed
- ✓ Desktop Call Control program is activated on the software key
- ✓ Optional *Unified Messaging* module must be set up to allow access to VVM program

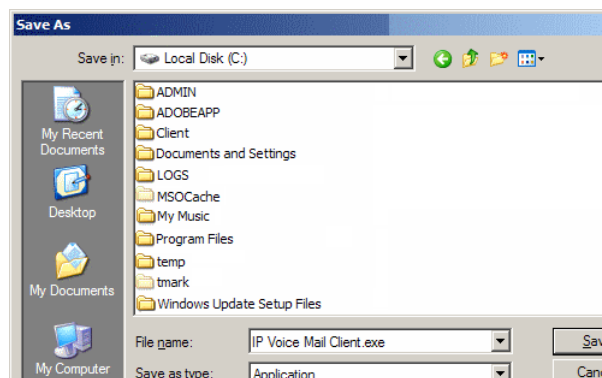
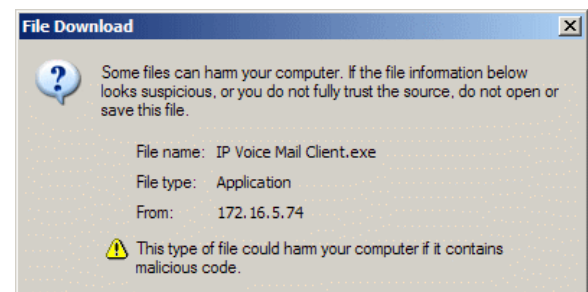
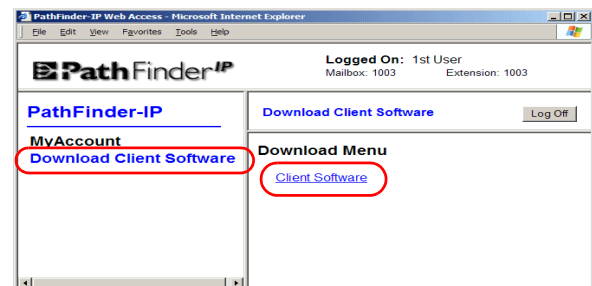
Workstation Requirements

- ✓ Each DCC user must install the Client Software on their computer as shown in the "File Download Process".
- ✓ BEFORE loading the Client Software, a properly working soundcard must be installed on the computer in order to use the DCC and VVM programs.

File Download Process

The DCC Client program is easy to access from a user's PC.

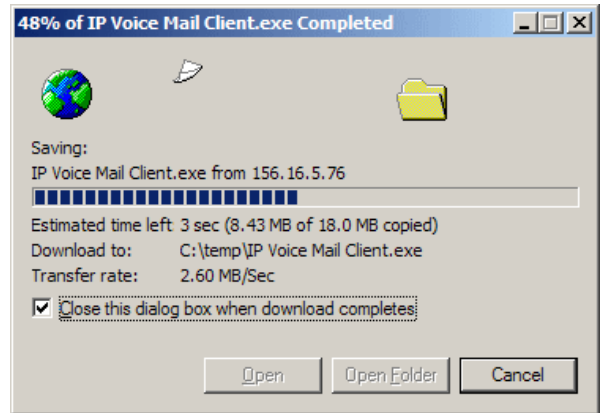
1. First, log in to the *PathFinder^{IP}*.
2. From the left-pane window, select "Download Client Software".
3. In the right-pane window, click the "Client Software" link.
4. When the "File Download" window displays, click the [Save] button to install the Client Software on to your computer.
5. From the "Save As" dropdown window, select the location where the program should be installed, typically on your local hard drive (C:).



- 6. After clicking the [Save] button, the "Download" window will display while the program system files are transferred to your computer.

During this process:

- » The DCC program will be added to your Windows Startup group. This will open the program automatically when you restart your PC.
- » Manually remove the program from the Startup Group, if desired.



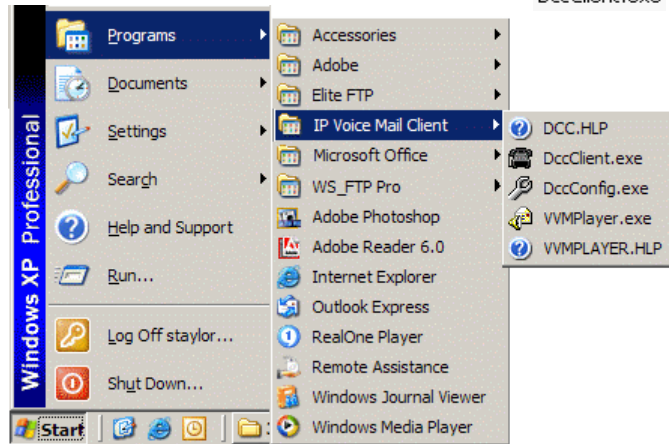
- 7. When the installation is finished, select the "Restart your computer" option.

Logging in to DCC


First-Time Login

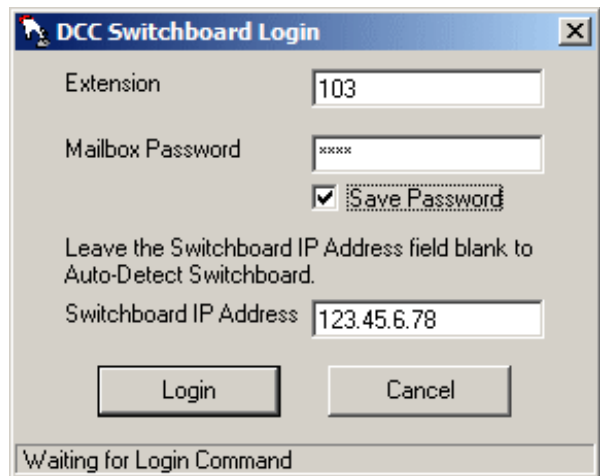
After installing the Client Software, and restarting your computer, the DCC program will open.

- » You will have the option of allowing the Client program to place shortcut icons on your desktop for easy access to the DCC applications.
- » If you choose not to accept this option, you can access the applications manually by going to the Start/Programs menu as shown ... =>



Switchboard Login

- » After the Client Software is installed, double-click on the program shortcut  on your desktop, or go to Start/Programs to open the DCC program.
- » When the *DCC Switchboard Login* window displays, enter your extension number and mailbox password, the system will search for the required IP address.
- » If multiple systems are running and *PathFinder^{IP}* is unable to locate the IP Address, you will need to enter the Server Name **or** IP Address manually.
- » When the login is successful, the *Desktop Call Control* window will auto-open.



Optional - DCC Desktop Program

DCC Operating Guidelines

When a Client logs into the DCC Client, the following program features were designed to function as follows:

Screen Pop -- By default, the screen will "pop" (become active desktop window) when a new call is presented through the auto-attendant.

If the screen does not pop up, the default ring .WAV file will play, but the Client will need to double-click the DCC icon in the system tray in order to use the DCC Client.

Ringling -- Ringling is set to a .WAV file recording of a short continuous ring.

This .WAV file can be customized by the Client as well as turned off completely. However, if the ringling is turned off, the screen will automatically pop up.

Call Screening (Voice Announce) -- Call Screening allows the Client to identify the incoming caller prior to taking action for that call.

The Client can customize the call-screening requirement on a per call basis or require it for all calls.

Call By Call -- The call by call action requires a button that requests the caller to state their name after it has been presented to the DCC.

All Call -- Must be checked on the Setup menu to require the name of each caller.

Caller ID -- If the phone system is equipped to send, or if the caller enters Caller ID, the DCC program will analyze and display the information.

When the Client enables either Caller ID option, a system message will display the appropriate amount of time for the No Answer Timeout setting.

Call Button Setup -- The Client can customize up to 15 call/action buttons that will display in 5-button increments. For buttons to operate properly, the Client must first set up a prompt and/or action.

DND Alert -- The Client can enable or disable a "DND alert" to remind them that they are in DND. This alert plays when a new message arrives and after the DND alert timer (default 30 minutes) has expired.

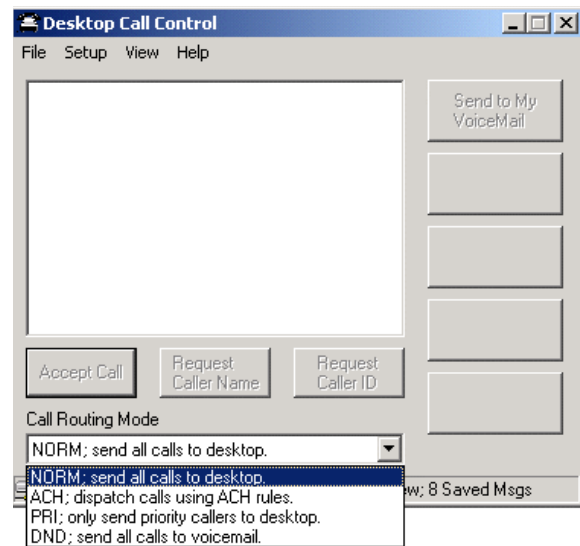
The reminder is a .WAV file and can be customized from the desktop. An alert will play when the Client is in DND and a caller leaves a message in their mailbox.

Priority Calls -- When a call is presented, and Priority Call is active, the Auto Call Handling personal call list is searched.

If the number entered by the Client matches a member on the list and is marked "Priority Call Yes", it is considered a priority call.

Voice Files -- The server computer stores the voice files. When the Client is editing any of these files, a copy is placed at the local computer for editing. When the editing is complete, the file is transferred back to the server.


MWI Signaling -- The status bar on the DCC window displays the number of messages in the Client's mailbox. A .WAV file plays each time the number of calls increase.



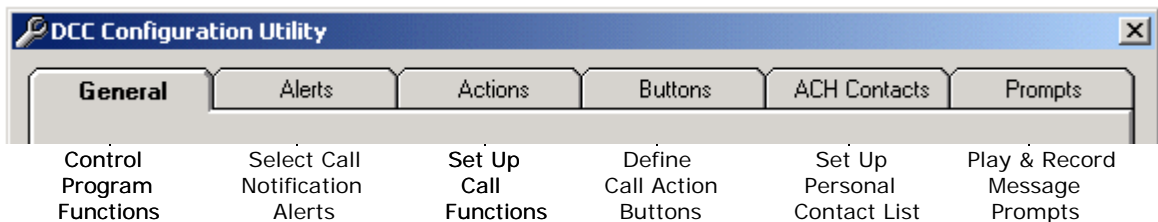
DCC Configuration Utility

The DCC Configuration Utility is the desktop application that will allow the user to define the parameters of their DCC Client program.

Program Access





The DCC call handling options can be accessed from the DCC "View > Configuration" menu, or by using the Configuration shortcut  placed on the Client's desktop during the installation process.

As illustrated, the DCC settings are divided into six categories. Whenever the desktop program is active, the user will be able to access and modify specific call functions.



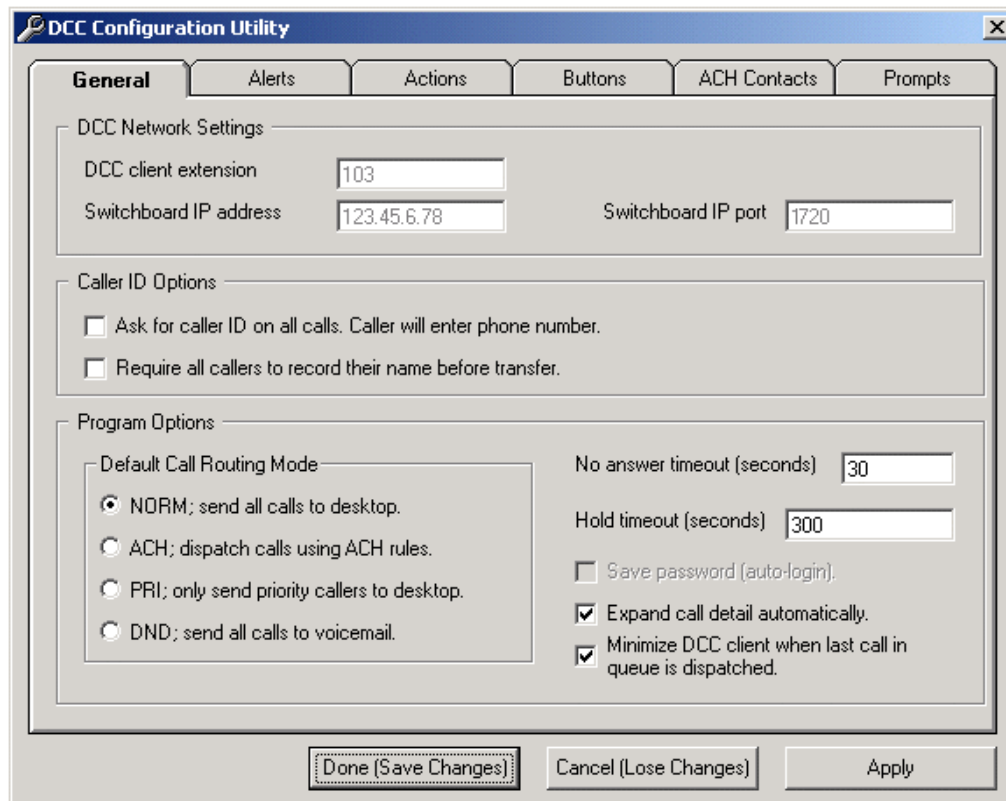
Using the Correct Order

For the following DCC features to function properly, the Client should configure the settings in the order shown:

- 1  Pre-recorded Voice **PROMPTS** will be used to set up call Actions, ACH Contacts, and Buttons.
- 2  Pre-defined call **ACTIONS** will be used to set up ACH Contacts and Buttons.
- 3  After names & phone numbers have been added to the **ACH CONTACTS** list, entries can be associated with pre-defined Actions.
(If Caller ID is available ... the system will search this list of contacts and take any action that is set up.)
- 4  User-access **BUTTONS** can be set up, once voice Prompts are recorded and Actions have been defined.

General Tab

The General tab will allow you to set up the call-handling functions for your incoming calls, as well as, how the calls will display on your desktop.



DCC Network Settings

The DCC Network Settings are “read-only” fields in the Configuration Utility. They are set during the login process.

DCC Client Extension

The extension that you used to sign into the client.

Switchboard IP Address

The IP Address or Name of the DCC Switchboard.

Switchboard IP Port

The IP Port used to connect to the DCC Switchboard.

(The default setting for the port is 1720.)

Caller ID Options

If your system has Caller ID, you can request these call-screening options.

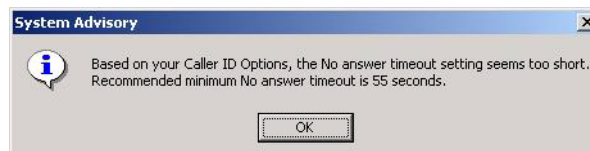
Ask for Caller ID ...

When selected, the caller will be prompted to enter their Phone Number.

Require All Callers ...

When selected, the caller will be prompted to say their Name.

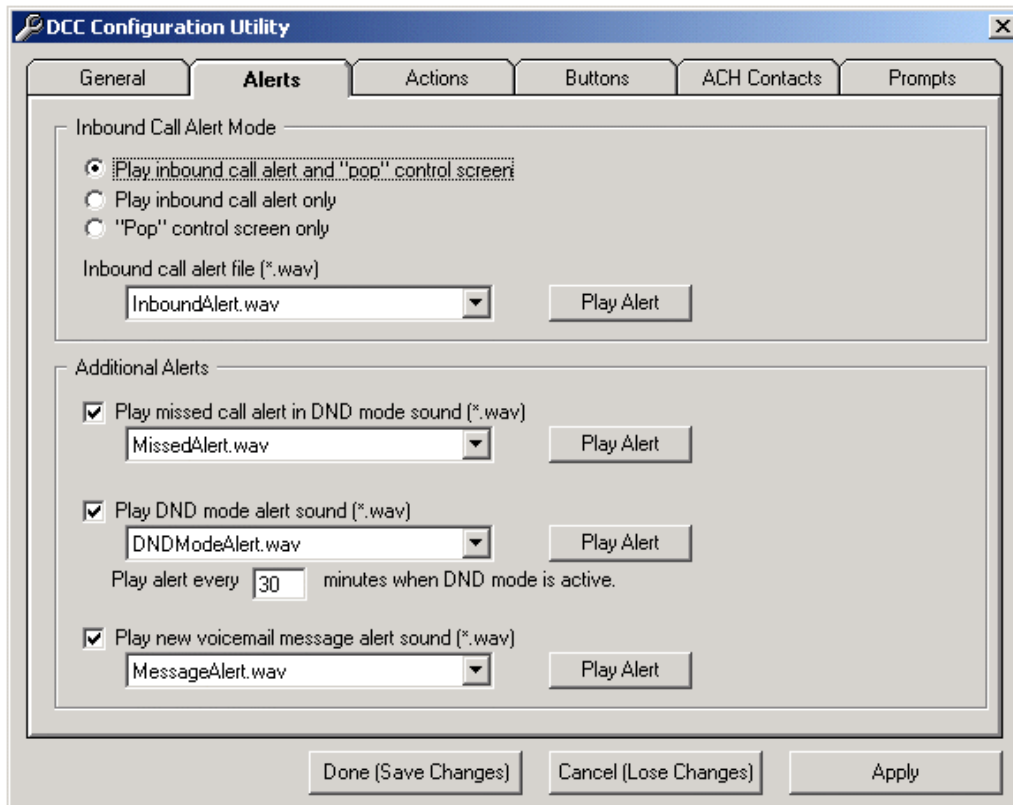
If BOTH options are selected ... you will receive a system message telling you the “no answer time-out” setting seems too short. Refer to the recommended time-out settings shown below.



| | |
|---|--|
| Program Options | These options control the operation of the Desktop Call Control programs. |
| Default Call Routing Mode | <p>This setting controls the startup Call Routing Mode of the DCC Client program. This may be changed in the DCC Client at run time. Only one option may be selected at any given time.</p> <ul style="list-style-type: none"> <input type="checkbox"/> NORM -- Callers will be sent to the desktop. <input type="checkbox"/> ACH -- Callers will be sent to voicemail if they do not have special ACH rules defined for them. When this mode is used, all callers will be asked for their phone number. <input type="checkbox"/> PRI -- Callers will be sent to voicemail unless they have been defined as a priority caller. When this mode is used, all callers will be asked for their phone number. <input type="checkbox"/> DND -- All callers will be sent to voicemail, no exceptions. |
| No Answer Timeout (seconds) | <p>This setting controls how long the system will allow a call in queue to remain unacknowledged by the user. When you are automatically asking callers to record their name or enter their Caller-ID, you must increase the "No answer timeout" setting.</p> <p>The system will give you an advisory prompt when you change the "No answer timeout" setting, or check either one of the Caller ID Options. You can then determine whether or not you want to make the change.</p> <p><i>Recommended settings are:</i></p> <ul style="list-style-type: none"> Normal -- 30 seconds Record caller name & ask for caller ID -- 55 seconds Record caller name only -- 40 seconds Ask for Caller ID only -- 45 seconds |
| Hold Timeout (seconds) | This setting controls how long, in seconds, you will be allowed to keep a caller on hold. The default for this setting is 60 seconds. |
| Save Password | If this option is checked then when you start the DCC Client or Config Utility, you will be automatically logged in. |
| Expand call detail automatically | If this option is enabled then whenever you receive a call, all the call details will be expanded. |
| Minimize DCC client when last call in queue is dispatched | The DCC Client will be minimized when there are no calls, if Minimize DCC Client when last call in queue is dispatched checkbox is marked. |

Alerts Tab

The Alerts Tab Controls define the way the DCC Client behaves when Call Events happen.



Inbound Call Alert Mode This where the 'Client' can choose the way they alerted of an incoming call.

The two alerts available are: Play an audible alert OR 'Pop' up the Control Screen as a visual alert that they have a call. The two alerts can be used alone or in conjunction with each other.

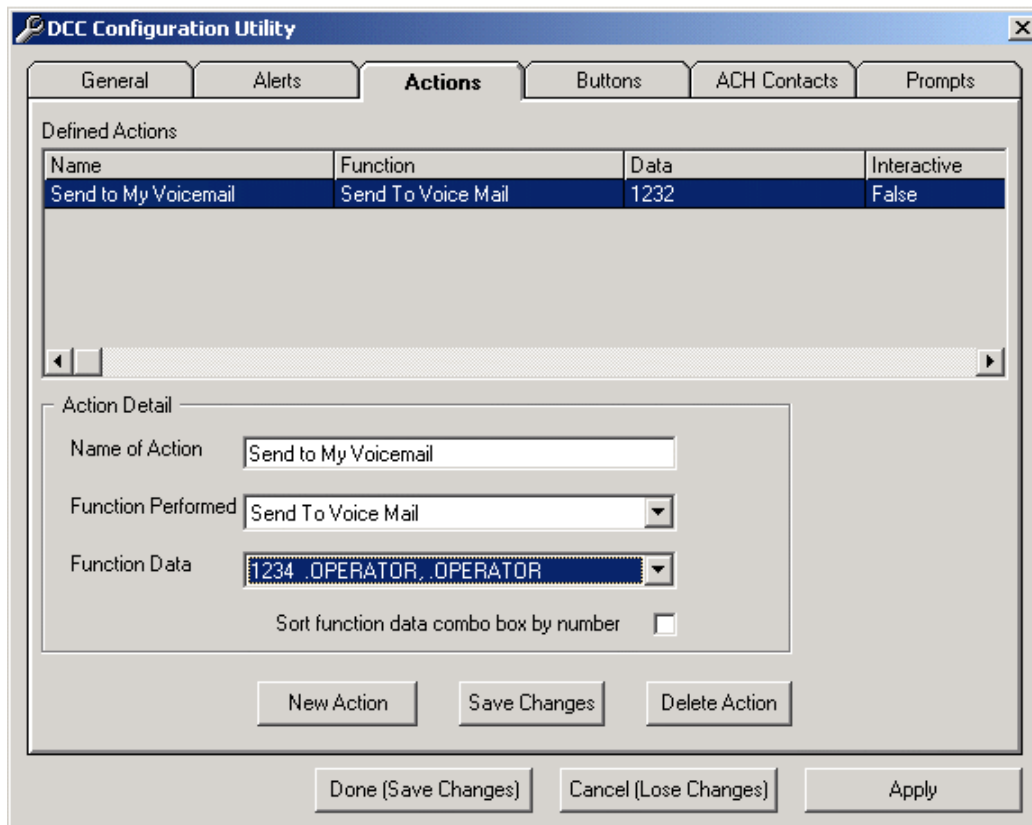
Additional Alerts

This where the 'Client' can choose additional alerts for DND missed calls, DND active reminder, along with the alert for New Voicemail.

The selected alerts are active only when the checkbox is marked.

Actions Tab

The Action Tab is used to define the actions that are used in the button configurations as well as contact actions.



Defined Actions

The list of Actions which are already defined for use by a button or contact action.

Action Detail

This is where you create, change, or delete an action. In order to change or delete, an action must not be associated with a button or contact action.

Name of Action -- The name that will be associated with the action.

Function Performed -- What action is to occur when called upon. The functions available are:

- Transfer to Extension
- Transfer to Phone Number
- Hold
- Send To Command File
- Send To Menu
- Send To Time Control
- Send To Voice Mail

Optional - DCC Desktop Program

Function Data -- Data related to the function to be performed. The options available are:

| | |
|---------------------------------|---|
| <i>Transfer to Extension</i> | ... Extension to transfer caller to. |
| <i>Transfer to Phone Number</i> | ... Phone number to transfer call to. |
| <i>Send To Command File</i> | ... Name of command file. |
| <i>Send To Menu</i> | ... Name of menu to send caller to. |
| <i>Send To Time Control</i> | ... Name of time control to send caller to. |
| <i>Send To Voice Mail</i> | ... Voice Mailbox to send caller to. |

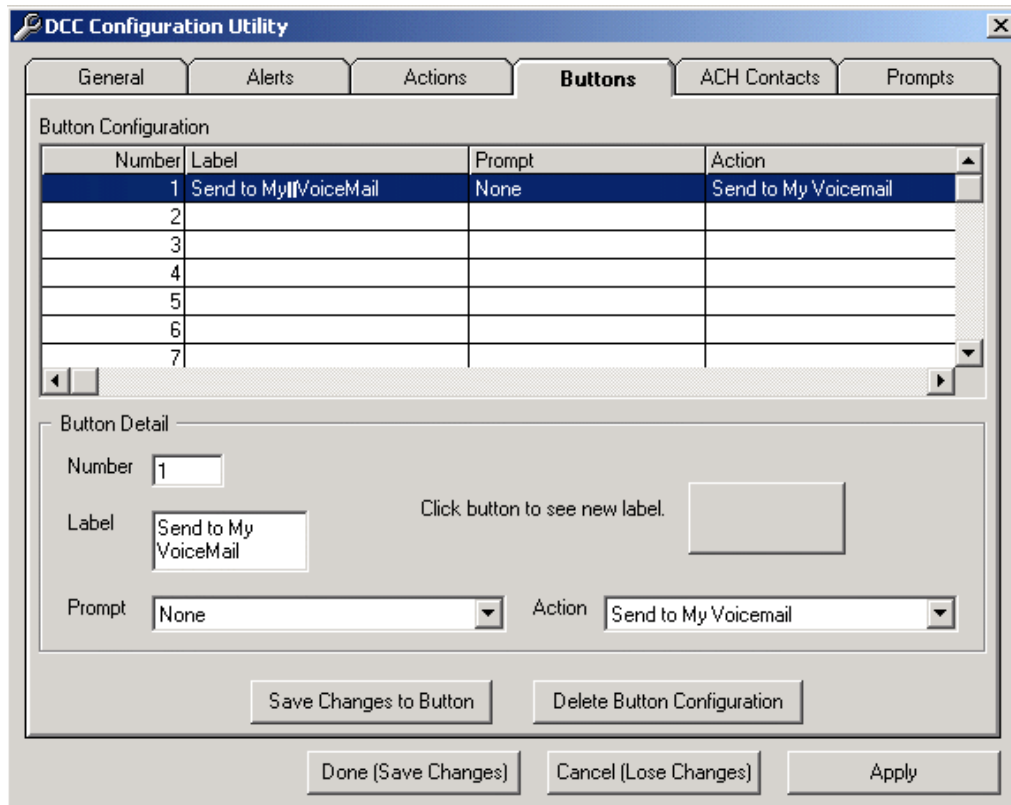
Sort function data combo box by number -- Select this option to view the function data in number order.

Button Options

New Action
Save Changes
Delete Action

Buttons Tab

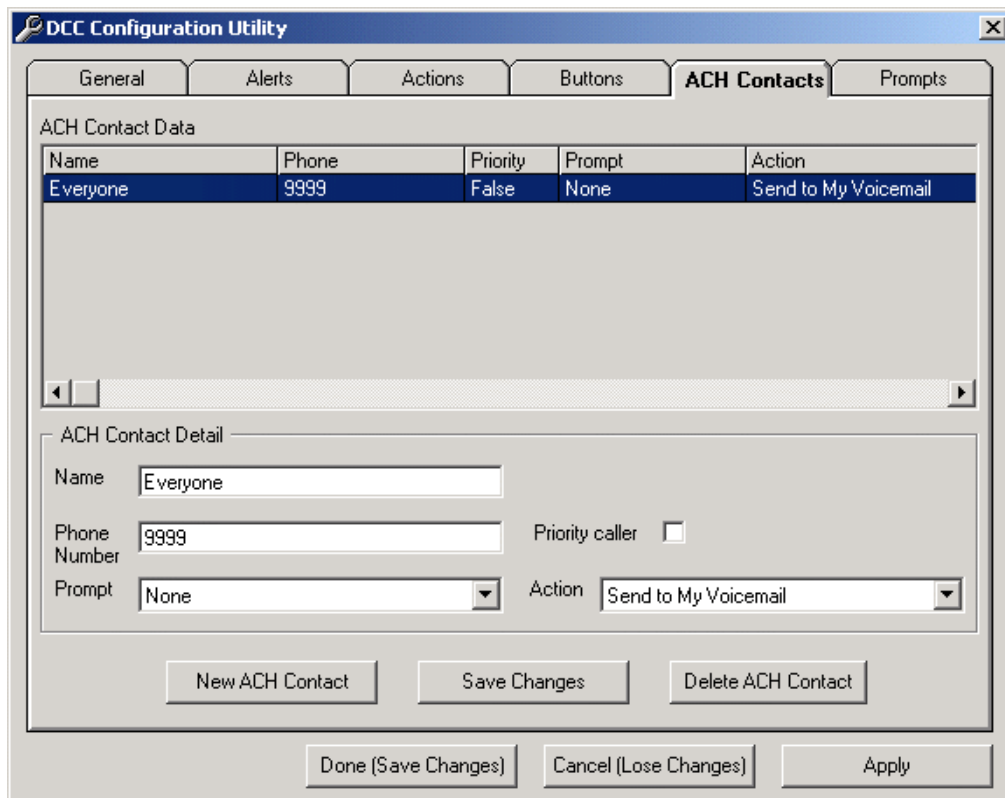
There are 15 custom buttons allowed on the DCC Client. This Tab is where you configure what those buttons do.



- Button Configuration** Lists the current buttons that are available to use. Details included in the list are: Button #, Button Label, Prompt for Button, Action performed.
- Button Detail**
- Number* -- The number of the selected button.
 - Label* -- The label that is used for the button on the control screen.
 - Prompt* -- Prompt played to the caller when the button is pressed.
 - Action* -- Pre-defined action from 'Actions' tab.
- Button Options**
- Save Changes to Button* -- This must be pressed in order to save any changes that were made.
 - Delete Button Configuration* -- Delete selected button settings.

ACH Contacts Tab

This tab allows you to manage your Contacts. Defining contacts allow you to perform different actions based on who is calling. This custom handling is achieved using ACH (Automatic Call Handling). When not using ACH mode you will see the name of the person calling when you ask for CallerID.



ACH Contact Data People who are on your contact list.

ACH Contact Detail *Name* -- Name displayed on Control Screen.

Phone Number - This is the number that will be compared to the number the caller enters.

Prompt -- Prompt played to caller after entering their CallerID.

Priority Caller -- This checkbox, if enabled, will flag the caller as a priority caller. When the PRI Call Routing Mode is in effect, priority callers will ring the desktop while all others go to voicemail.

Action -- Pre-defined action from 'Actions' tab. This is the action that will be performed for this caller when ACH Call Routing Mode is in effect.

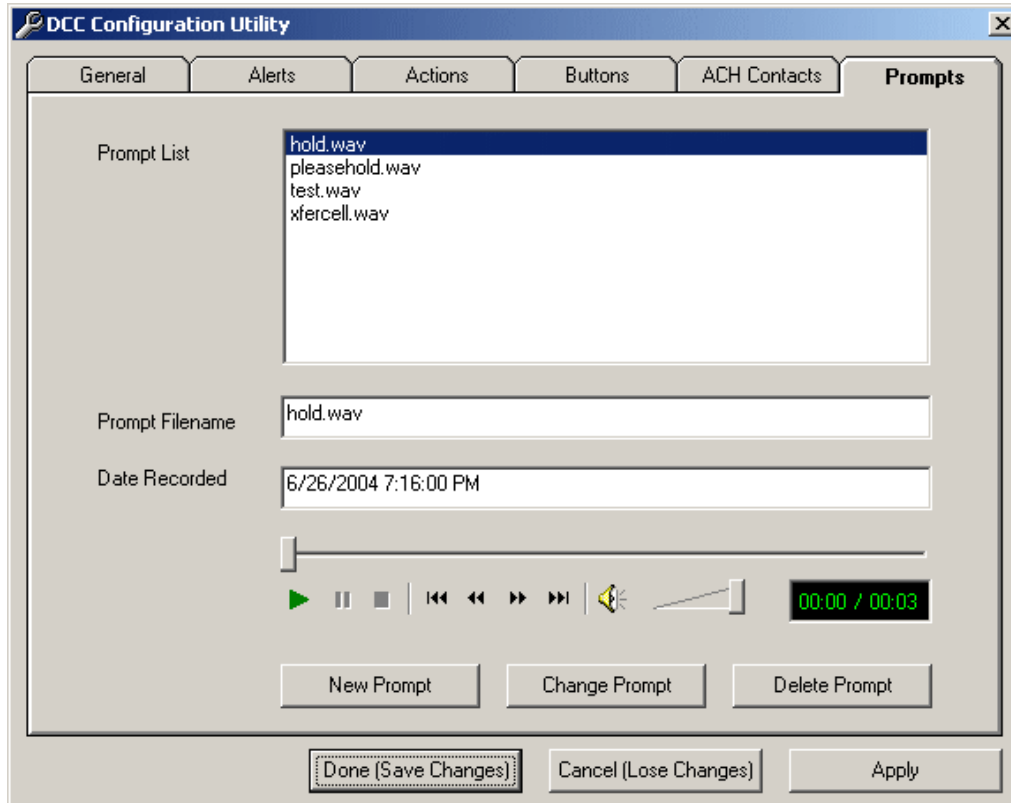
Button Options *New ACH Contact* -- Create a new entry in the Contact List/Contact Data.

Save Changes -- Save changes that were made to the selected entry in Contact Data.

Delete ACH Contact -- Delete the selected entry from Contact Data.

Prompts Tab

This tab allows you to manage your custom prompts.



Prompt List

List of available prompts which can be used by DCC. Prompts are audio files that can be played to the caller.

Prompt Filename

Name of prompt selected from the Prompt List.

Date Recorded

Date and time the selected prompt was recorded.

Button Options

New Prompt – Launches Prompt Recorder application.

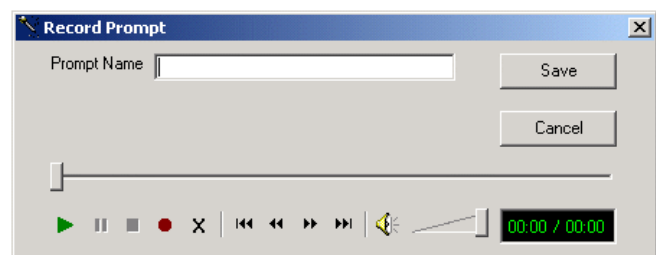
Change Prompt – Allows you to change a previously recorded prompt.

Delete Prompt – Deletes the selected prompt.

Prompt Recorder -- allows the user to create & record custom prompts to play for callers.

To record a new prompt:

1. Type name of prompt and press <ENTER>.
2. To record the prompt, press RECORD.
3. To stop recording, press STOP.
4. To re-record the prompt, press RECORD.
5. When satisfied with recording, press SAVE.
6. To exit without saving, press CANCEL.



VVM Player

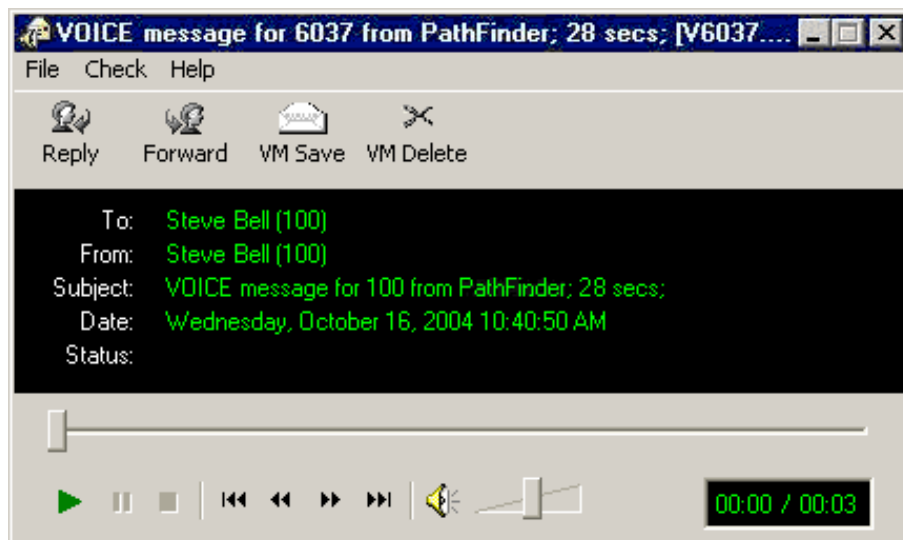
Overview

VVM-Player is the "Voice Mail Player" application that allows you to manage the playback and recording of Unified Voice Messages on the client workstation.

With the VVM-Player, you can easily reply to and forward voice messages using an integrated address book. You can also select to mark messages as Urgent or Private.

Once installed, voice messages delivered to your e-mail client will have the file extension ". VVM". When you double-click the attachment, the VVM-Player will launch and display the message information.

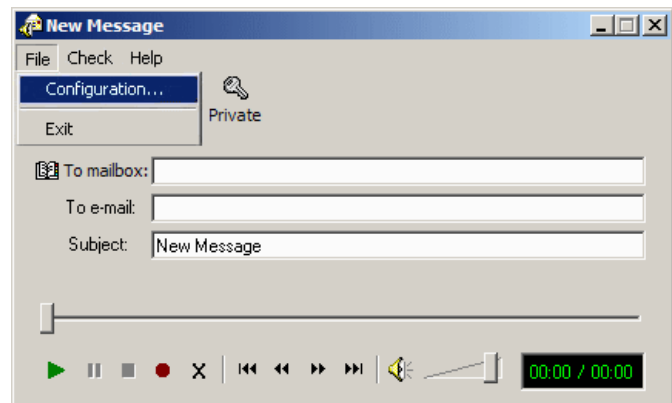
From the player screen, you can listen to the message and select to reply or forward the message.



VVM Configuration

The VVM application is installed as part of the DCC Client Installation.

1. Once VVM-Player is installed, click on the program shortcut to run the application.
2. When the "New Message " screen displays, select "File" and then "Configuration".

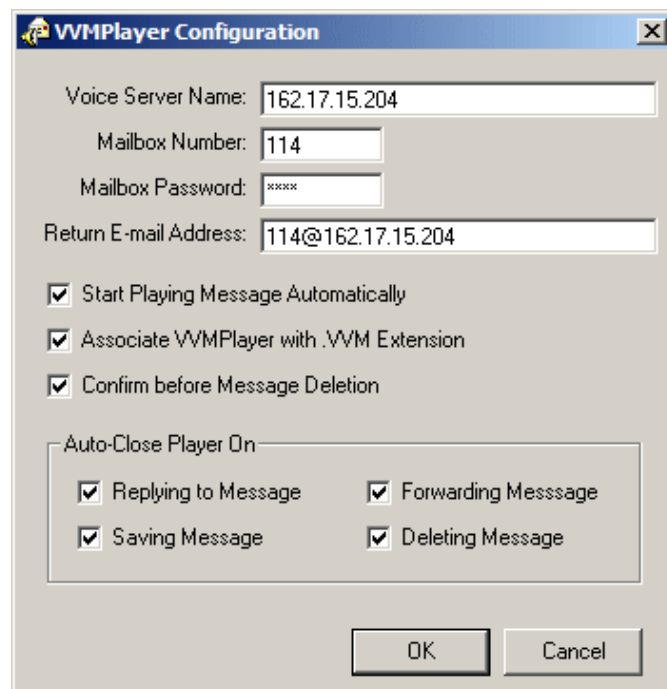


3. The "VVMPlayer Configuration" screen that opens will allow you to modify the VVM-Player for proper operation, if needed.

If the *PathFinder^{IP}* is up and running ...

The name, mailbox, and e-mail fields are filled in automatically, -and-

All message options will be enabled.



Optional - DCC Desktop Program

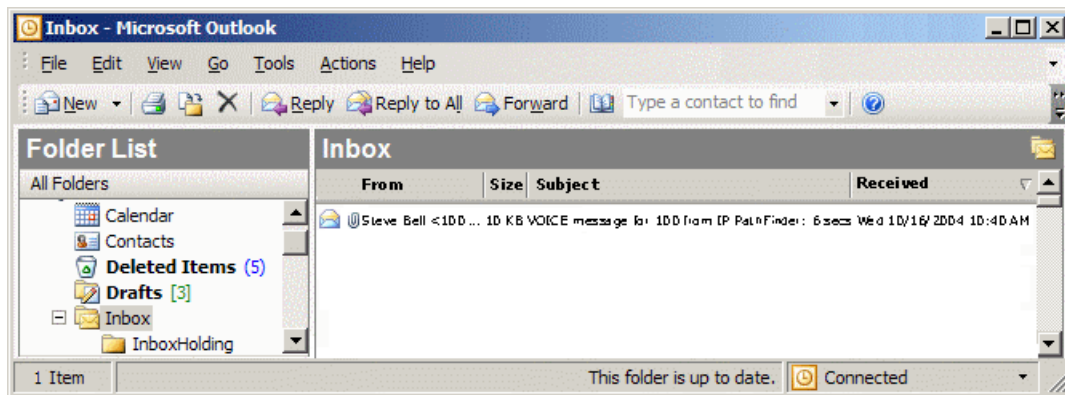
| | |
|---|---|
| Voice Server Name | This is the name of the voice mail server running the server software. The name should be a properly formatted TCP/IP machine name that is reachable by this computer. |
| Mailbox Number | This is the mailbox number that should be associated to all of the voice messages that the VVM-Player originates. The mailbox number MUST exist on the <i>PathFinder^{IP}</i> system. |
| Mailbox Password | This is the mailbox password for the mailbox listed above. It must match the password for the mailbox on the <i>PathFinder^{IP}</i> system. |
| Return E-Mail Address | <p>This is the return address that anyone you send a message to will see and reply to. For almost all systems, this should be your VPIM address for your voice mailbox, which is your voice mailbox number and the address/name of your <i>PathFinder^{IP}</i> voicemail server, such as 1000@MyFeatureServer.com</p> <p>See your <i>PathFinder^{IP}</i> System Administrator for the correct server name or address to use.</p> <p>In rare cases, this address could be your e-mail address for your e-mail account, but this can produce undesirable results if you receive VPIM voice messages in reply that your e-mail client cannot correctly decode.</p> |
| Start Playing Message Automatically | If checked, when the VVM-Player is launched to play a voice message, it will automatically start message playback. If item is not checked, you will have to click the "Play" icon to start message playback. |
| Associate VVMPlayer with .VVM Extension | If checked, VVM-Player will associate itself will all files ending in ".VVM". You should always leave this item checked. |
| Confirm before Message Deletion | If checked, VVM-Player will ask you to confirm by selecting Yes or No, before deleting a voice mail message on the <i>PathFinder^{IP}</i> server. This is to protect against accidental deletions. |
| Auto-Close Player On | <p>If any of the following are checked, then VVM-Player will automatically close itself after you perform the associated action(s) as a time saving step.</p> <ul style="list-style-type: none"> Replying to Message Saving Message Forwarding Message Deleting Message |

After entering the information above and clicking "OK", the system will contact the voice server and indicate that all new voice messages that are to be delivered to the e-mail client should be sent with the file name changed from ".WAV" to ".VVM".

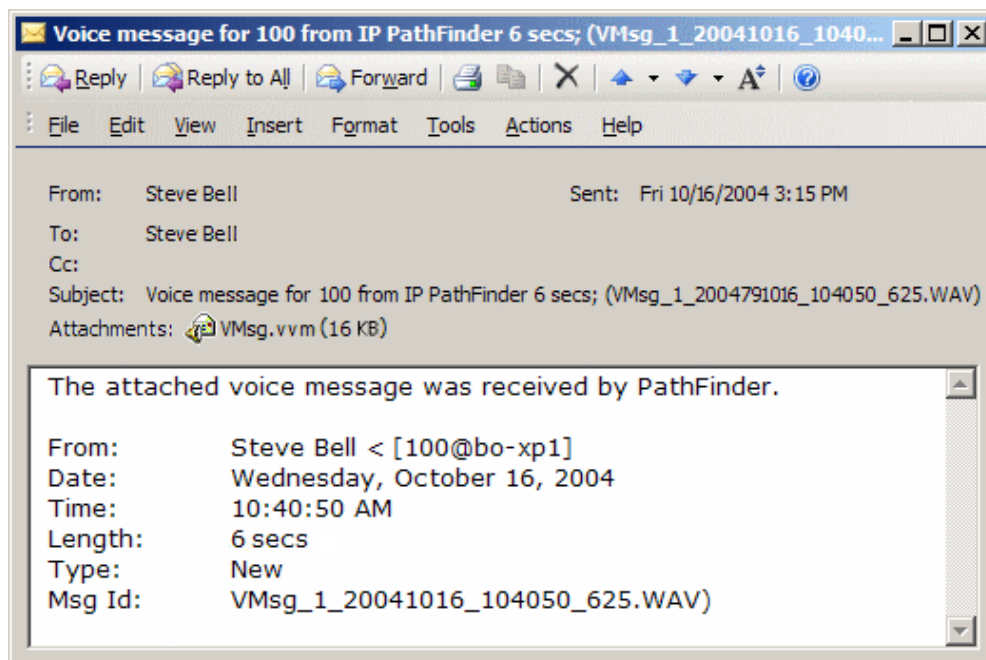
Receiving a .VVM Message

When your e-mail client receives a voice mail message from *PathFinder^{IP}*, it will be a sound file attachment (either .VVM or .WAV depending on your configuration) and it will be displayed something like this (example from Outlook 2000):

When you open the e-mail message, you will see a short e-mail message description of the voice mail message, and the sound file attachment (in this example, a .VVM file):

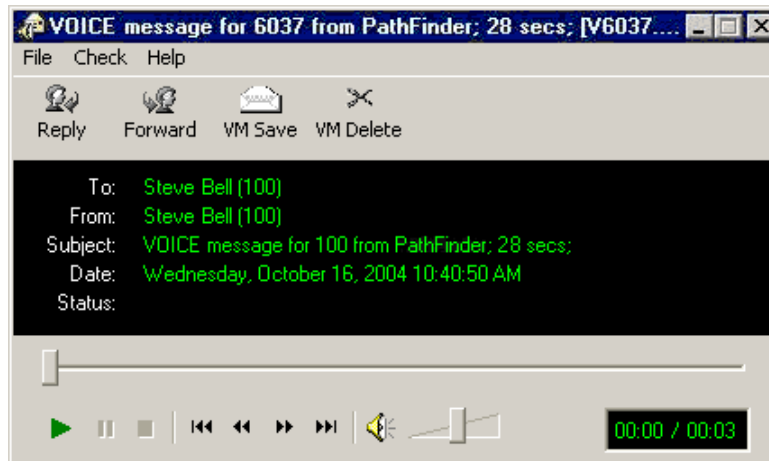


When you want to hear the voice mail message, double click on the .VVM attachment, and VVMPlayer will open up and let you Play, Reply, or Forward the message.



Playing a Message

This is the window you see when you open a *PathFinder^{IP}* voice mail message with the VVMPlayer.



Message Play Buttons - The Message Play Buttons along the top of the VVMPlayer "Voice Message" window are to help you control whether you record a message in response (Reply or Forward), and how to handle (Save or Delete) this voice mail message on your *PathFinder^{IP}* Voice Mail System.

| | |
|-----------|---|
| Reply | Clicking "Reply" will cause VVMPlayer to bring up the sound file recording form with addressing fields to let you reply with a voice message to the mailbox that originated the current voice mailbox message. |
| Forward | Clicking "Forward" will cause VVMPlayer to bring up the sound file recording window with addressing fields to let you send the current voice mailbox message, along with any additional voice preambles to various voice mailboxes and e-mailboxes. |
| VM Save | Clicking "VM Save" will cause <i>PathFinder^{IP}</i> to mark the current voice message as Saved in your voice mailbox. |
| VM Delete | Clicking "VM Delete" will cause <i>PathFinder^{IP}</i> to mark the current voice message as Deleted in your voice mailbox. |

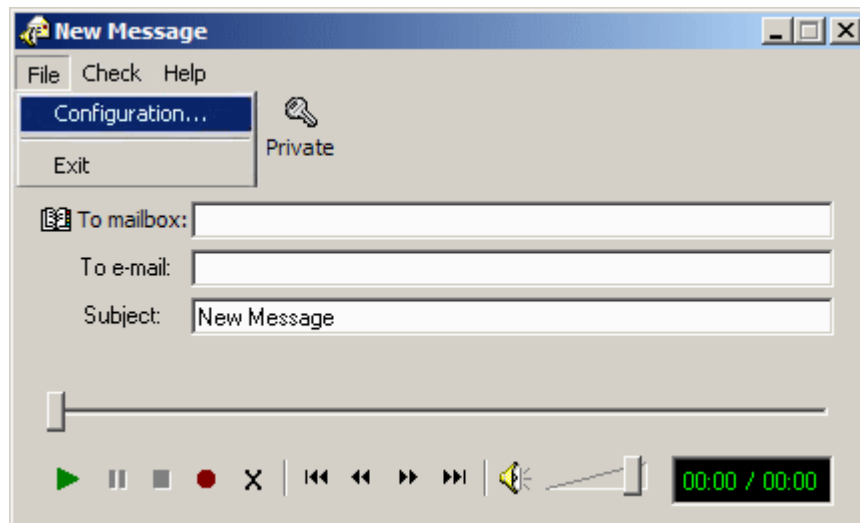
Sound Buttons - The Message Sound Buttons along the bottom of the VVMPlayer "Voice Message" window are used to record and play back a voice message that you want to attach to message.

| | |
|----------|--|
| Play | Begin playing the current sound file. |
| Pause | Pause the playing of the current sound file. |
| Stop | Stop the playing of the current sound file. |
| Record | Begin recording into the current sound file. |
| Sound | Enable/Disable sound output. |
| Volume | Sliderbar to increase/decrease sound volume. |
| Position | Current/Total recording position and length. |

Originating a Message

When the VVM-Player is started without a VVM file, the "New Message" screen is displayed. If you are listening to an existing message and select to "reply" or "forward" a message, the original screen is displayed.

In either case, you can record and then send voice messages to other mailboxes within the system or external e-mail addresses.



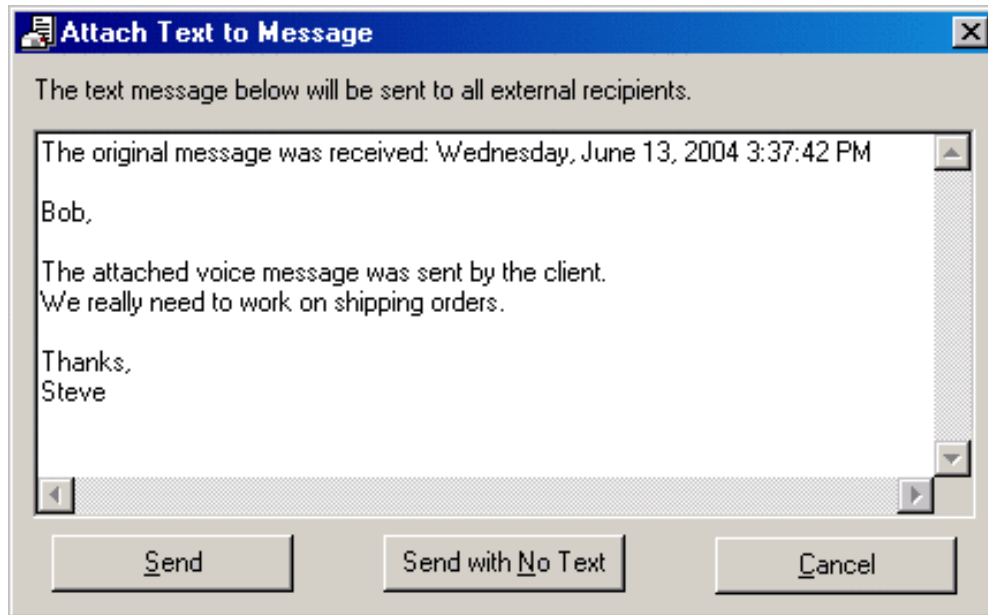
Message Send Buttons - The Message Send Buttons along the top of the VVMPlayer "New Message" window are to help you control the sending of your sound message.

| | |
|---------|--|
| Send | <p>Clicking "Send" will cause the system to check the addresses and then check to make sure that a reply has been recorded. If none has been recorded, the system will ask you if that is what you intended.</p> <p>Next, if you are sending to external e-mail addresses, the system will prompt you for a text message that can be attached to the outgoing voice message. Refer to "Attach Text To Message".</p> |
| Check | <p>Selecting the "Check" icon will cause the system to validate all of the "To mailbox" addresses against the mailbox list kept on the server.</p> <p>External e-mail addresses will be checked for basic syntax. External e-mail addresses must have name, then the '@' symbol and then a company or domain name. The system does not check that the e-mail address actually exists, only that it is formatted correctly.</p> |
| Urgent | <p>Clicking the "Urgent" box will mark the message as urgent in the receiver's mail system.</p> |
| Private | <p>Clicking the "Private" box will mark the message as private in the receiver's mail system.</p> |

Attach Text To Message

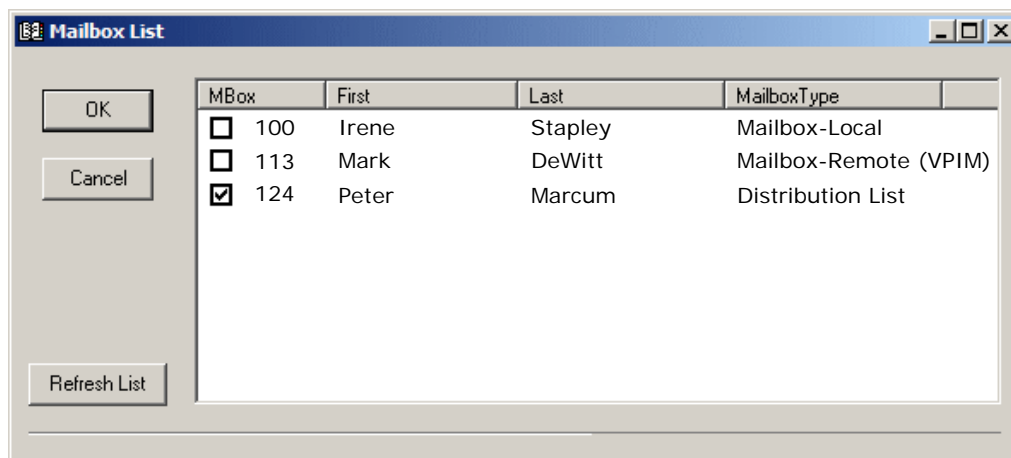
This window allows a user to attach additional text to a voice message. The *Attach Text to Message* window will open whenever:

- » "Reply" or "Forward" is selected while listening to an existing message,
- or-
- » "Send" is selected after creating a new message.



Address Book

The "Address Book" screen is used to assist in the addressing of new messages. The data in this list is downloaded from the DataServer located in the voice server. Clicking "Refresh List" will cause the system to go back to the voice server and download a new address book. You can check the box next to each mailbox number to select the person to be included in the "To" list for the new message.

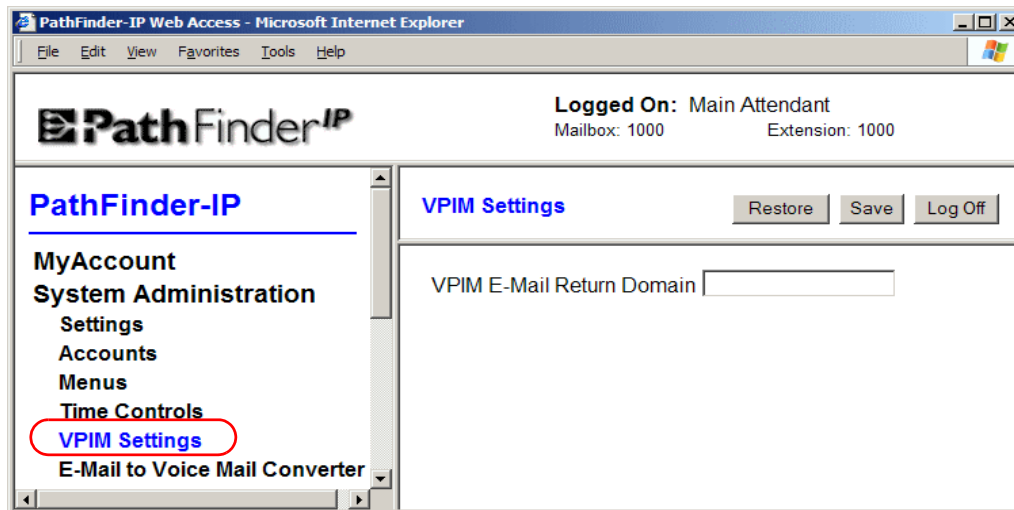


Addresses

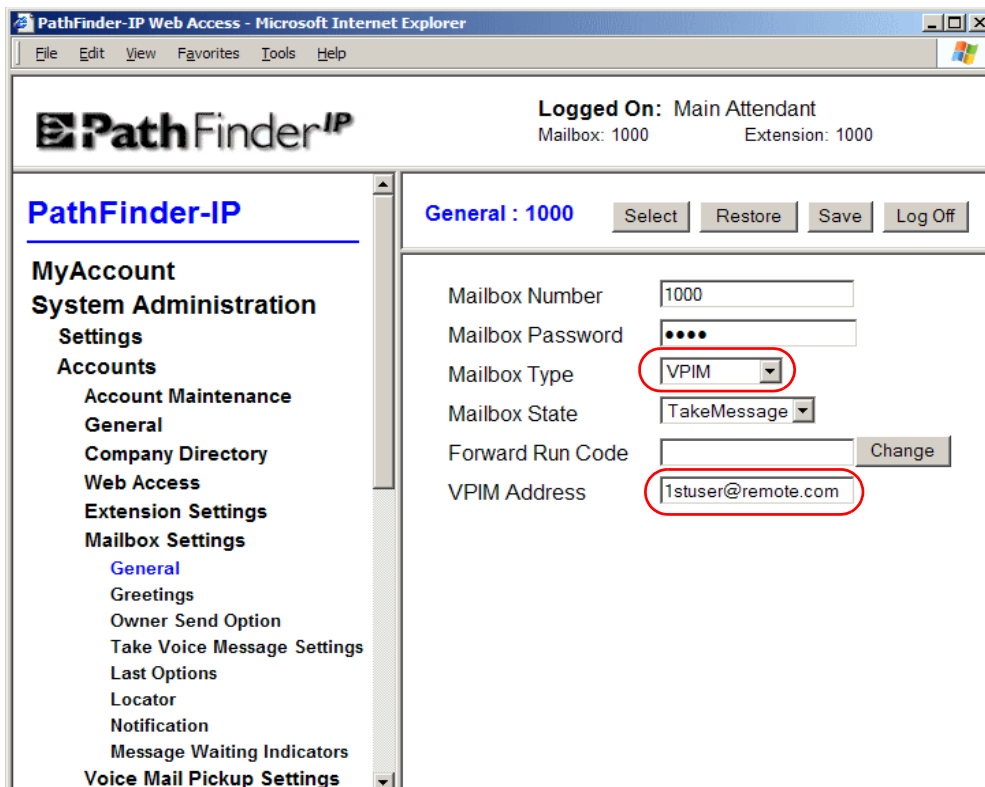
- To Mailbox** You may enter one or more voice mailbox number(s) or the personal mailbox name. You can also click on the Address Book icon to bring up the address book of local *PathFinder^{IP}* voice mailboxes. You may use local *PathFinder^{IP}* mailboxes (ex: 1234), *PathFinder^{IP}* distribution lists (ex: 6000), and remote *PathFinder^{IP}* VPIM mailboxes (ex: 5004 see VPIM Addresses) Multiple addresses if all types may be entered if separated by semi-colons (;) ex: 1234; 6000; 5004.
- To E-mailbox** You may enter one or more e-mailbox addresses to send a .WAV sound file to. Multiple e-mail addresses may be entered if separated by semi-colons (;) ex: test@host.com; target@hotmail.com Each address should be a properly formed e-mail address. Commas can separate multiple addresses. You may also specify a proper name with the e-mail address by using the following as an example: "Bill Gates <bgates@microsoft.com>"
- Subject** You may type in the subject of the message as you want it to appear on the destination mail system.
- To address a message, you can type in the mailbox number or the personal mailbox name. You can also click on the "Address Book " icon to bring up the address book. Multiple "To" addresses can be specified by separating them with a semi-colon.
- External v-mail addresses can be specified in the "To mailbox" field. VPIM addresses are actually configured in *PathFinder^{IP}* to look like internal mailboxes, so there is no real difference in how you enter them here. For more information, refer to the Administrator Mailbox Settings, or VPIM address.

VPIM Addresses

PathFinder^{IP} systems that are connected to a network can send and receive voicemail messages to other voicemail systems, including other *PathFinder^{IP}* systems. VPIM, or Voice Profile for Internet Mail, is the protocol used for this type of message transfer.



In order to use VPIM addresses from your VVMPlayer, your *PathFinder^{IP}* System Administrator must configure an internal mailbox as a VPIM mailbox for each external VPIM mailbox you wish to send to. The screen below shows a Mailbox Type of "VPIM", and the VPIM Address of 1stuser@remote.com. When a message is stored into such a mailbox, *PathFinder^{IP}* sends the message to the VPIM address using a VPIM protocol.



Troubleshooting - DCC Applications

Desktop Call Control

1. DCC Client will not run unless DCC Switchboard is running on the *PathFinder^{IP}*.
2. Client machine must have a sound card installed.
3. View Notebook ... this program will take about a minute to come up.
4. If the "Application error from Login Form error 430" message is received:
 - a. The MDAC is too low on your client machine.
 - b. Update the MDAC off the *PathFinder^{IP}* CD located at: \Client\MDAC\mdac_typ.exe

DCC Call Logs

These advanced troubleshooting tools are available on each Client's computer and will help to provide a history of their call activity.

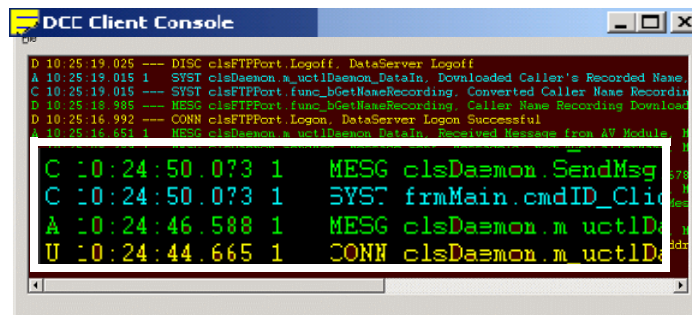
- » **Logging Detail** -- This DCC option will allow the Client to specify the level of detail needed for a call log report (*DCC Setup menu*).

STANDARD ... shows standard call detail, which includes: when the DCC connects to the *PathFinder^{IP}* and the TCP/IP address, as well as when it was disconnected.

DETAILED ... lists most call transactions, to include Standard call detail.

DEBUG ... shows all interaction between the *PathFinder^{IP}* and the Client PC.

- » **Call Log** -- Using the "logging detail" specified, this DCC option will generate a current call activity report (*DCC View menu*) that will automatically open in *Notepad* when selected.
- » **DCC Client Console** -- This DCC option will display system data logged in real-time (*DCC Setup menu*). The entries are color-coded to make details easier to read.



CONSOLE COLOR CODE

- Cyan - System messages
- Green - TCP/IP msg traffic
- Red - Errors
- Yellow- Connection events

CONSOLE FIELD KEY

- Field 1 - Source of Entry:
 - A - ActiveVex Module
 - C - DCC Client
 - D - DataServer
 - S - Switchboard
 - U - Unknown
- Field 2 - Timestamp of Entry
- Field 3 - Connection ID
- Field 4 - Extension
- Field 5 - Log Type
- Field 6 - Log Message

Desktop Messaging

1. Client PC must have a sound card installed.
2. For time-sensitive greetings:
 - a. "Use Rules" must be checked.
 - b. Double-click on time greeting number.
 - c. Check "Rule Enabled" and then fill in time information.
3. Notification Settings – Locator Numbers
"Use rules" must be checked to modify entries.
4. E-mail reading is predefined so that one could respond to an e-mail via the phone.
5. Setting up e-mail/master list for SMTP push (ADMIN ONLY):
 - a. Do not enable a push AND pull from Outlook at the same time.
 - b. You will receive duplicate messages if both e-mail protocols are set up.

VVM Player

1. Client must have Outlook file extension set to .VVM in order to use VVM Player.
If the .WAV file extension is selected, the VVM Player cannot be used.
2. VVM Player must be setup:
 - a. Open up the VVM Player.
 - b. Click on File / Configuration, then select Setup.
 - c. The IP address of the *PathFinder^{IP}* machine must be entered along with the mailbox number and password.
 - d. Click on the option that will associate the .VVM extension to the VVM Player.
3. In order for the MWI to operate on the phone associated with the client workstation, the VVM Player must be used.
 - a. Click on the VM Delete button in the VVM Player to delete the message.
 - b. When the system asks "Do you want the message to be deleted from the server", the response must be "YES".
 - c. This will not delete the e-mail in the Inbox, however it will delete the message from the server and turn off the MWI on the phone.

Optional - Messaging Capabilities

Client E-Mail Program Settings

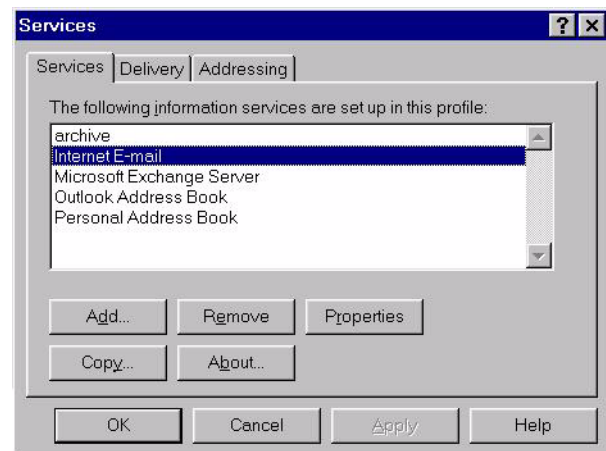
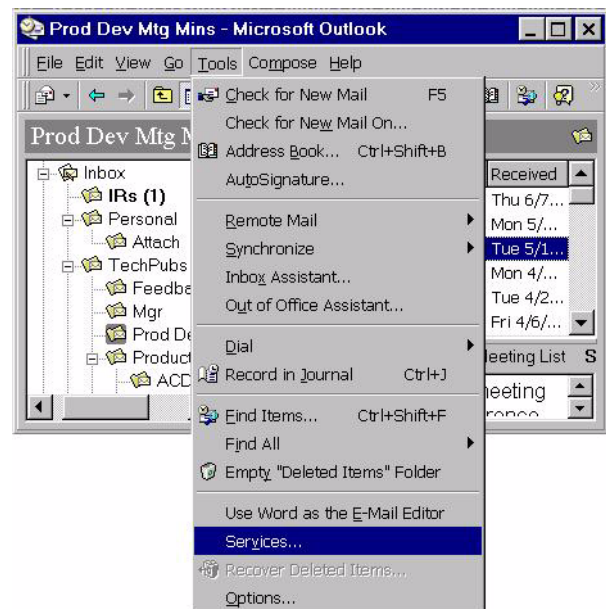
The "optional" *Unified Messaging* application allows e-mail, voice mail, and fax-mail to be displayed in one e-mail client. You will need to change certain profile/property settings to allow *PathFinder^{IP}* to interface with your E-mail program (e.g., Outlook).

Setting Up Microsoft Outlook

For Windows 98 Users

To use Outlook for sending/receiving e-mails, and responding to voicemail messages from your Desktop, complete the steps as follows:

1. Open your Microsoft Outlook program.
2. From the menu bar, select **Tools > Services ...**
3. After the *Services* window displays, select "Internet E-Mail", then click **Add**.



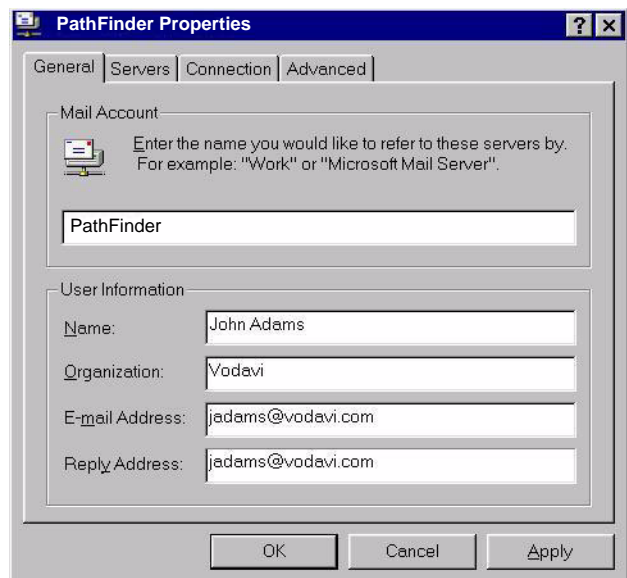
Optional - Messaging Capabilities

4. When *Add Service to Profile* window displays, select "Internet E-mail" then click **OK**.



5. In *Properties* "General" window, complete server and user information as indicated.

- Mail Account -- Use "*PathFinder*" for the name of the server. As you enter the server name, the *Properties* window will change to reflect the new name.
- Name -- Your name as you would like it to appear when sending a message.
- Organization -- The name of your company.
- E-mail Address -- Your company e-mail address.



6. When finished, click **Apply**. The *system* will display the message: "Please enter a valid POP3 server."
7. Click **OK**, the application will display the *Properties* "Servers" window.

8. In the new *Properties* window, enter the server and login information as indicated.
 - Outgoing mail (SMTP) -- IP address of the *PathFinder*.
 - Incoming mail (POP3) -- The same IP address used for incoming mail.
 - Account Name -- Your extension number.
 - Password -- Your voice mailbox password.
9. To retain a copy of your e-mail messages on the Server, click the "Advanced" tab and checkmark: "Leave a copy of messages on server".

PathFinder Properties

General Servers **Connection** Advanced

Server Information

Incoming mail (POP3): 123.45.6.78

Outgoing mail (SMTP): 123.45.6.78

Incoming Mail Server

Account name: 1234

Password: xxxxx

Remember password

Log on using Secure Password Authentication

Outgoing Mail Server

My server requires authentication

Settings...

OK Cancel Apply

10. Click **Apply** to have the system capture the information you just entered.
11. Then click **OK** to close the *Properties* window.
A system message will remind you to exit Microsoft Outlook to add this new service to your e-mail application profile.
12. Click **OK** to acknowledge message, then close remaining "open" Outlook windows.
13. To activate *Unified Messaging* application, close and re-open Outlook as suggested.

PathFinder Properties

General Servers Connection **Advanced**

Server Port Numbers

Outgoing mail (SMTP): 25 Use Defaults

This server requires a secure connection (SSL)

Incoming mail (POP3): 110

This server requires a secure connection (SSL)

Server Timeouts

Short Long 1 minute

Sending

Delivery

Leave a copy of messages on server

Remove from server after 5 day(s)

OK Cancel Apply

Client E-Mail Reading

Using the "optional" *Text-to-Speech* program, you will be able to listen to your e-mails being read over the phone.

- » When you call in to your mailbox and select the "listen to e-mail" option ... you will hear who sent the message, what time it was sent, and what is in the subject line.
- » After the entire message is read ... you will be able to send a response by attaching a .wav file to the message, or you can select one of the 9 predefined e-mail messages. (Refer to "[Client E-Mail Program Settings](#)" on page 67.)

E-mail Access via Telephone

Mailbox Prompts

- » Once you access your voice mailbox, you will be presented with the following system prompts:
 "You have X new messages, and X saved messages."
 "To retrieve messages ... press [1]."
- » Depending on the messages received, press the number associated with the type of message you wish to hear:
 "You have X (*voice, page, fax, or e-mail*) messages ... to retrieve msgs, press [X]."
 1 - Voicemail 2 - Page Mail 3 - Fax Mail 4 - E-mail

Envelope Information

After pressing [4] to retrieve your e-mail messages ... the first envelope will play, followed by the e-mail text.

| E-mail Envelope Information |
|--|
| <p>If an e-mail is not marked urgent, the envelope will be read as follows:</p> <p style="text-align: center;"><i>"Playing envelope for new message ..."</i></p> <p>Originating address/name (when available) The subject is ... From ... Received ... (date & time) Number of lines ... (number of) attachments ... Name of attachment ... Sent to (address in "To" field) ... Message</p> <p style="text-align: center;"><i>"End of envelope."</i></p> <p>For MULTIPLE messages:</p> <p style="text-align: center;"><i>"Continuing with message play ..."</i></p> <p>The items listed above will be read for each message.</p> <p>When all e-mails have been read, the TTS Reader will finish with: <i>"End of document reached."</i></p> |

E-mail Message Options

Lists playback selections in sequential order:

| Message - Playback Options | |
|-----------------------------------|--|
| Main Menu | |
| [0] | Play message envelope |
| [1] | Play message text |
| [2] | Save message |
| [3] | Delete message |
| [4] | Forward message |
| 1 | - Forward message as is |
| 2 | - Forward with a text message (1- 9) |
| 3 | - Forward with a voice message |
| 1 | : Select e-mail address by spelling name |
| 2 | : Select e-mail address from pre-defined list |
| 3 | : Forward to a mailbox |
| | (Up to 5 addresses can be addressed at one time) |
| | : Help |
| [5] | Reply to message |
| 1 | - Reply to sender |
| 3 | - Replay to a mailbox |
| 1 | : To reply with voice response |
| 2 | : To reply with text message (1-9) |
| * | - Exit |
| [6] | For additional options: |
| 1 | - Replay |
| 2 | - Pause message |
| 3 | - Skip to next message |
| 6 | - |
| 7 | - |
| 0 | - Call addressee |
| * | - Repeat this menu |
| [7] | Skip to previous sentence |
| [8] | Skip to next sentence |
| [9] | Disconnect and hang-up call |
| [#] | Go back to main owner menu |
| [*] | Repeat this menu |

To e-mail a response using a standard telephone, the name must be entered manually.

To respond or forward messages, the following options are available:

- Canned e-mail address; 9 per mailbox
- Mailbox number mapped to e-mail address
- Spell name using the keypad
- Allow more than one address as well as CC for forwarding
- If there are any addresses in the "BCC" field, they are ignored
- Forward attachments

When a message is forwarded, send any attachments with it as the file was sent to you.

E-mail Message Handling (Priority)

All e-mail messages are automatically prioritized in the order they are received. The messages marked "Urgent" are received first.

The "priority" field in your personal e-mail list can be used to prioritize members of that list. All other messages are listed in the order received.

E-mail Responses (Pre-defined)

You will have access to 9 pre-defined e-mail responses. Each response can be up to 255 characters in length.

This allows you to send or respond to an e-mail through a telephone. Only the e-mail address and initial telephone number are required.

Pre-established E-mail Addresses

Master E-mail List

You will be able to access a "master e-mail address list" using the *PathFinder^{IP}* "dial by name" function.

When prompted, enter the pre-defined number of characters for the person's first or last name, followed by the [#] key.

Example ... dial [5][6][4][6]+[#] for the name "John".

Multiple Matches

If more than one match is found ... then all matches will be read as shown in the following example:

"For John Adams at jadams@vodavi.com, press 01"

"For John Adams at jadams@email.com, press 02"

"For John Brown at jbrown@net.com, press 03"

Client E-mail List

You can add an "unlimited" number of e-mail addresses to your personal e-mail list. The addresses will be stored in the master list area, but they can only be accessed by your mailbox.

You will also have the ability to import/export e-mail addresses to the "Server." This action will give you better *response time* when accessing the e-mail database at your Desktop.

| FirstName | LastName | EmailAddress | Mailbox | Type | PriorityNum |
|-----------|----------|-------------------|---------|------|-------------|
| John | Adams | Jadams@vodavi.com | 255 | P | 1 |
| Bob | Brown | Bbrown@net.com | | S | 0 |
| Jayne | Smith | Jsmith@vodavi.com | 245 | M | 0 |

SUPERVISOR NOTE -- When a mailbox is deleted, the client's personal e-mail list is also removed.

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