



***VBS AUTOVOICE  
Telephony Server  
User Guide***

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## Letter to User

Congratulations on your purchase of the VBS (Voicemail Broadcast System) Telephony Server series from U.S. Infotel Corp. Your VBS will meet your telephony needs by providing a robust application built on stability, backed by rigorous testing and unlimited free technical support. To maximize your Telephony Server, take time to read the following manual. If at anytime you have a question, feel free to contact technical support via email, [support@usinfotel.com](mailto:support@usinfotel.com), or phone, 1-800-941-2590.

Sincerely,


**U.S. Infotel Corp.**

### Notice to VBS Telephony Server Users:

You may encounter compatibility issues when attempting to install additional software/hardware packages on the VBS Telephony Server. Before you install any additional software on your VBS Telephony Server, please verify with the software/hardware manufacturer that it is compatible with the Windows 2000 Professional<sup>®</sup> operating system. For additional information on Windows 2000 Professional<sup>®</sup> please consult the Windows 2000 Professional<sup>®</sup> Quick Start Guide that accompanied your VBS Telephony Server or visit <http://www.microsoft.com>.

## Conventions

This document uses the following conventions:

Item	Convention
Menu items and button names	<b>Boldface font</b>
Note to user:	<i>Italic font</i>
Caution: You are capable of doing something that might result in equipment damage or loss of data.	

## Related Documentation

The following additional documentation is available:

### Online Documentation

- VBS Telephony Server Online User Guide (.pdf)

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# Chapter One: Unpacking and Assembly

## Contents

### ***Breakdown of components***

The Telephony Server will arrive in two boxes; the smaller box contains the actual computer, while the larger box contains the monitor and other devices, such as the keyboard. First unpack the large box and separate the components, the following components are included:

- Keyboard
- Mouse
- Monitor
- Monitor Power cord
- Speakers
- Phone cord (Modem)
- Microphone
- Additional software
- Telephony Server Manual

The smaller box contains the following components:

- Computer (also referred to as the tower)
- Power cord

Once all of the components are unpacked, decide where to place the Telephony Server. Make sure the location has a level surface, power outlet(s), and access to standard analog telephone line(s), (not a PBX extension).



**In order to protect you Telephony Server from power surges, U.S. Infotel Corp. recommends using a surge protector and UPS. This will help eliminate the risk of damaging your Telephony Server during a storm or power-outage.**

## Assembly

### ***Overview***

Before beginning assembly, USIC suggests placing the monitor, speakers, mouse, microphone and keyboard on your desktop and placing the tower on the floor. This will help keep the cords and components organized.

To connect the components use the following step-by-step guide; in order to avoid any connection based problems make sure all connections are tight and secure.

## **Connecting Your Components**

- 1) Plug the monitor cord into the blue faced connector on the back of the tower
- 2) Plug the black monitor power cord into the back of the monitor and then into the wall jack (or surge protector/ups)
- 3) Plug the black tower power cord into the back of the tower and then into the wall jack (or surge protector/ups)
- 4) Plug the mouse cord into the round green connector on the back of the tower
- 5) Plug the keyboard cord into the round purple connector on the back of the tower
- 6) Plug the speaker cord into the small round green connector on the back of the tower
- 7) Plug the speaker power cord into the wall jack (or surge protector/ups)
- 8) Plug the microphone into the small round pink connector on the back of the tower

## **Attaching Phone Lines**

Once the Telephony Server's main components are connected, attach the phone line(s) to the telephony card(s). The telephony card(s) can be found on the back of the tower towards the bottom, and depending on the number of lines purchased, will have a phone jack for each telephone line. Each telephone jack will contain a label (1,2,3, etc.), which correlates to a Line Module in the VBS application (Line 1, Line 2, Line 3, etc.).

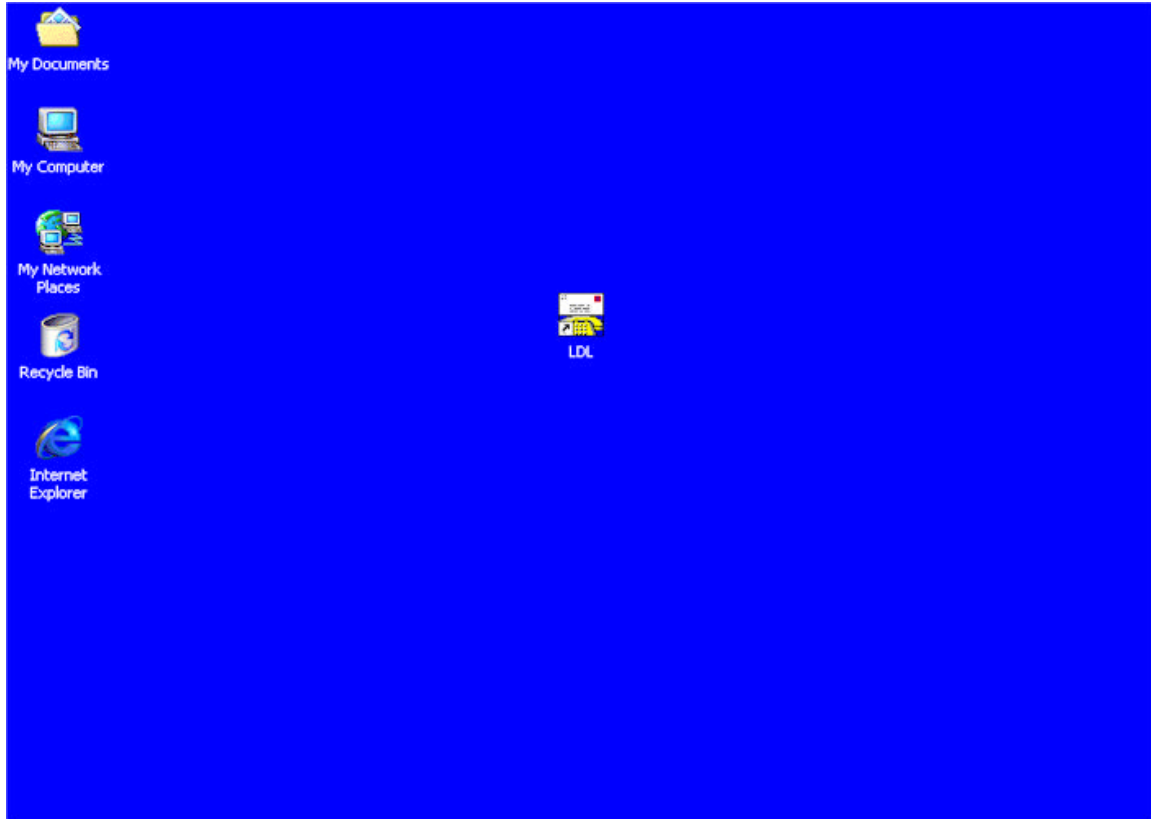
Please note that the Telephony Server does contain a standard 56K modem, which contains two telephone jacks (Line In/Line Out). *The modem will not be utilized in the VBS application to conduct outbound dialing or receive inbound calls, instead the modem is used for connecting to the Internet.*

## **Starting your Telephony Server**

Once you have all of the components connected start the Telephony Server.

- Turn on the monitor
- Turn on the speakers
- Turn on the computer by pressing the **Power** button on the tower
- The Telephony Server will start loading Windows 2000 Professional®
- The first screen that will appear is the *Welcome to Windows* logon prompt

By default, the Telephony Server login name is **VBS**; no password is necessary. Press **OK** and the Telephony Server will continue to load Windows 2000 Professional®.



Please note that although it may appear that Windows 2000 Professional<sup>®</sup> has finished loading when the icons appear on the desktop, program drivers may be loading in the background. Be sure to give your Telephony Server a few additional moments when loading to avoid any possible issues.

## ***Introduction to Windows 2000 Professional<sup>®</sup>***

### **Logging On and Shutting Down**

If you are new to using the Windows 2000 Professional<sup>®</sup> or even an experienced Windows 9x user, USIC recommends reading the following section.

Unlike Windows 9x, Windows 2000 Professional<sup>®</sup> will not restart by pressing the **CTRL, ALT** and **DELETE** keys at the same time. Instead, to restart or shutdown the Telephony Server complete the following steps:

1. Make sure the VBS application is not running
2. Press the **Start** button
3. Select **Shutdown**
4. In the *Shut Down* window select **Restart** or **Shutdown**

Selecting **Restart** will restart the Telephony Server. Selecting **Shutdown** will power down the Telephony Server, there is no need to press the **Power** button on the tower, only turn off the monitor and speakers.


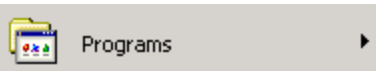

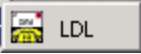
*Serious Technology from Serious People*

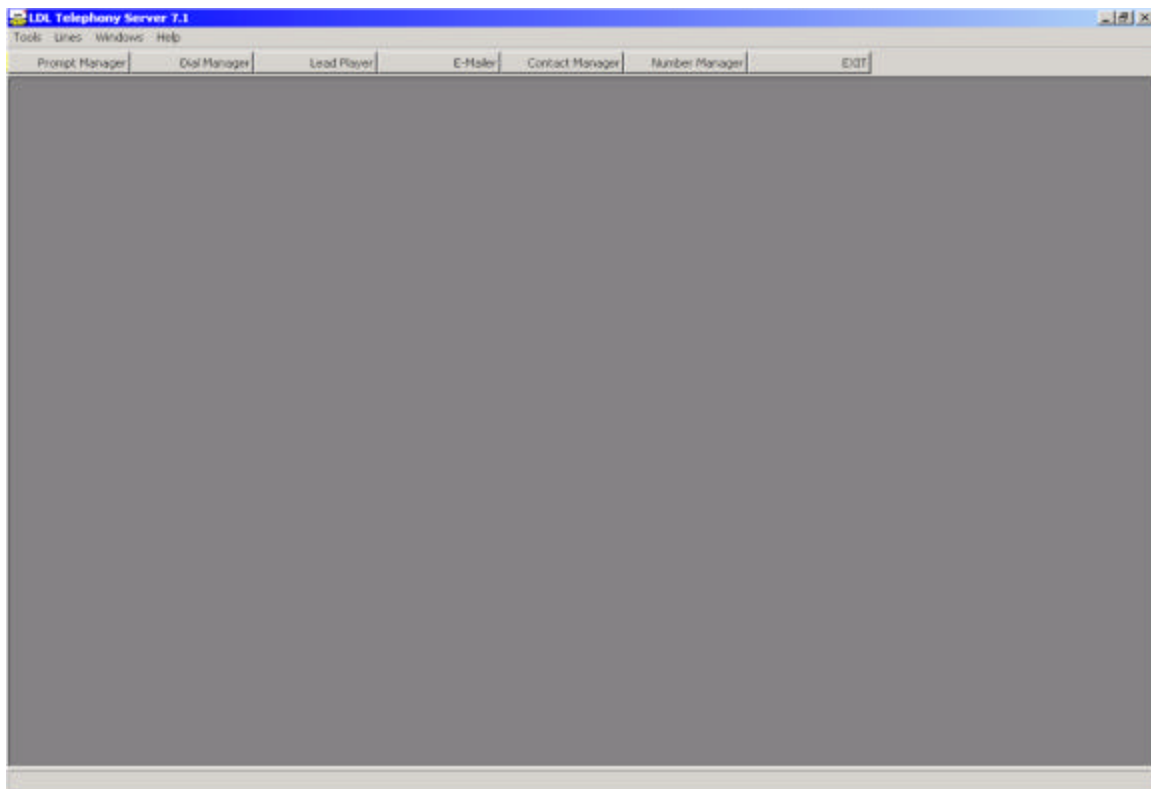
**Before you install any additional software or hardware**

Before installing any additional software/hardware run the VBS application. Please be aware that installing additional software/hardware may cause the VBS Telephony Server to function improperly. Please check that the software/hardware you intend to install is compatible with Windows 2000 Professional®.

**Opening the VBS Application****Overview**

To start the VBS application complete the following steps:

- Press 
- Press 
- Press 
- Press 



The upper most toolbar contains the **Tools, Lines, Windows,** and **Help** menus. This toolbar is used to set Dialing Rules, open and close the Line Module(s), and close all other open modules.

The Module bar opens the different modules that comprise the VBS application. Contained within the module bar are the **Prompt Manager, Dial Manager, Lead Player, E-Mailer, Contact Manager, Number Manager** and **Exit** button.



**Warning: USIC strongly recommends that you do not exit individual modules or the VBS application by using the ALT-F4 key command or ending the process via the Task Manager. Instead, always exit modules and the overall application using the appropriate EXIT button.**

## Chapter Two: Using Dialing Rules

### Dialing Made Simple

#### **Overview**

Before dialing, you will need to establish dialing rules for the Telephony Server. Dialing rules are used to instruct the Telephony Server on whether or not to dial a "1" for long distance, include only the area code or only dial the prefix and suffix.

#### **Area Code**

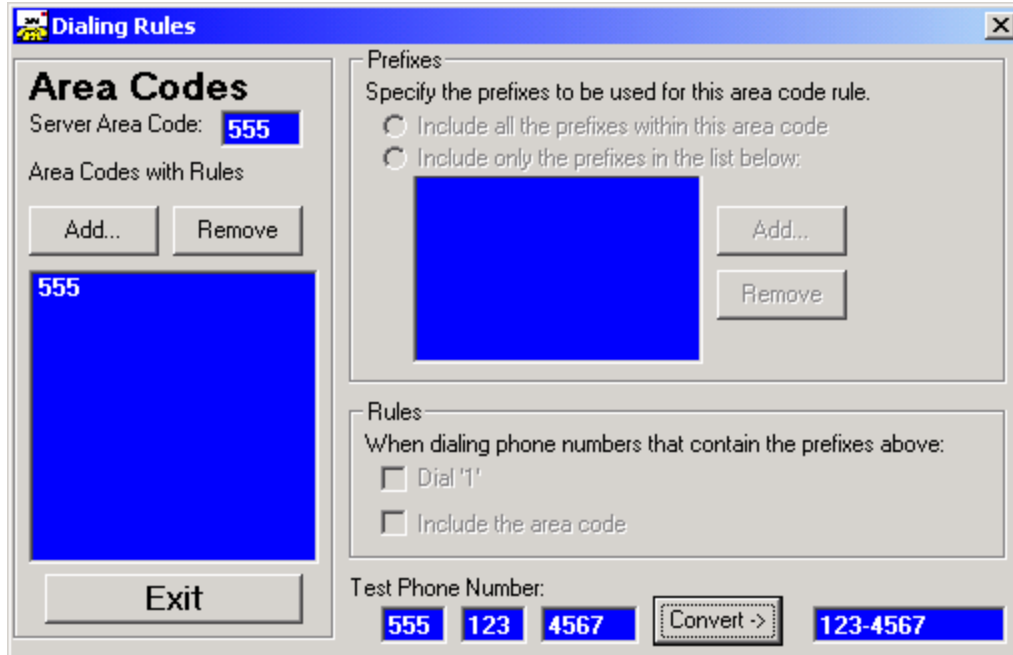
First, enter the local area code into the **Server Area Code** box. Next, for each area code dialed, enter in the area code and determine how the number should be dialed:

- Adding an area code without selecting any dialing rules, will dial the number based on seven digit dialing (prefix and suffix)
- By selecting **Include Area Code** the area code will be dialed before the prefix (ten-digit dialing)
- By selecting **Dial '1'**, a 1 will be dialed, then the area code, then the seven digit number
- By default, if a dialing rule is not established for an area code, the number will be dialed using **1-###-###-####** formatting.

Since a single area code can contain prefixes that are both local and long distance calling zones use the **Specify the prefixes to be used for this area code rules** to assign specific prefixes either long distance dialing, ten digit dialing, or seven digit dialing.

#### **Special Cases**

When entering the Live Voice Transfer or Testing Dialing Method phone number enter the 10-digit phone number (area-code, prefix and suffix); making sure you have established the proper dialing rule(s) based on the area code(s).



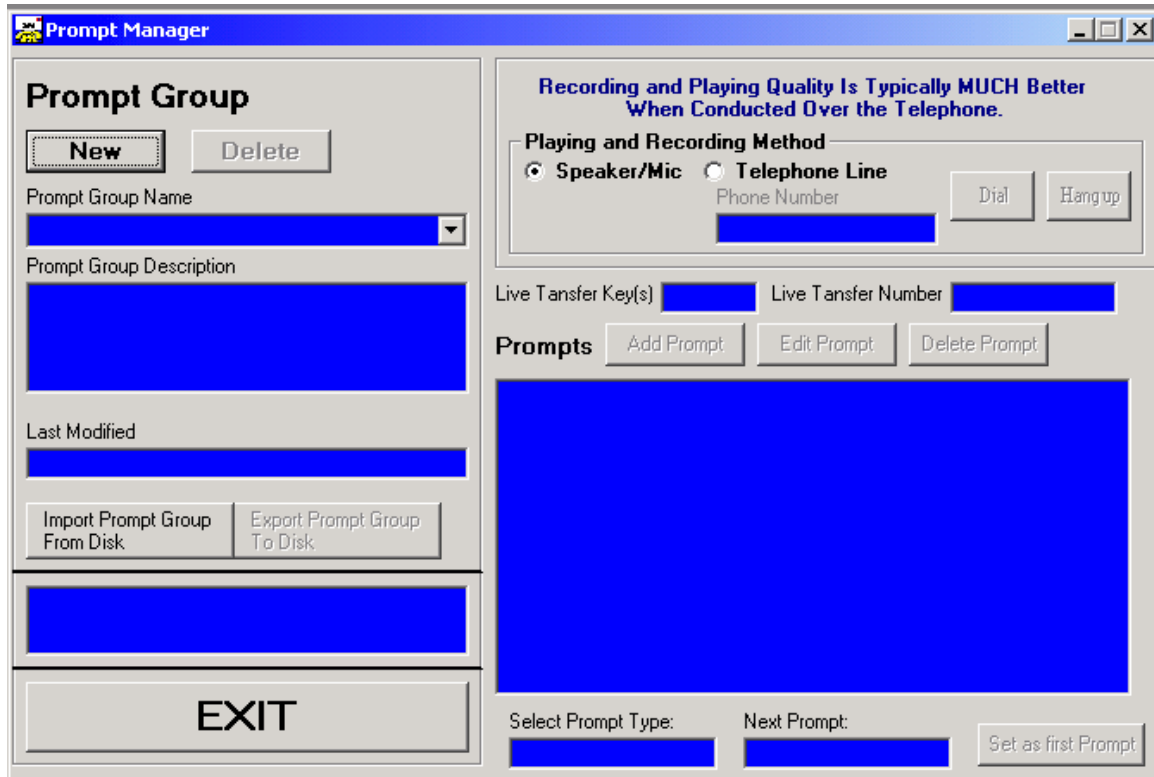
### ***Test Phone Number***

USIC strongly recommends that you use the **Test Phone Number** utility to determine if the dialing rules have been setup correctly. To use the **Test Phone Number** utility enter the area code, prefix and suffix of a number and then press **Convert**, the format of the converted phone number shown is how the number will be dialed during outbound calling.

## Chapter Three: Using the Prompt Manager

### What is a Prompt Group?

Each Prompt Group is comprised of individual prompts, or voice recordings. Prompt Groups can contain just one prompt or multiple prompts.



### What are the different types of Prompts?

To customize your Prompt Groups, four types of Prompts are available, **Play Menu**, **Play Message**, **Record Message** and **Record Digits**.

#### ***Play Message***

The Play Message Prompt broadcasts a message. For example, *“Hello, this is a notice that school has been cancelled.”*

#### ***Play Menu***

The Play Menu Prompt will guide callers to a predetermined Prompt by pushing a specified key. For example, *“Hello, for information on Product A, press 1, for information of Product B, press 2.”*

## Record Message

The Record Message Prompt allows callers to leave a message, commonly referred to as a lead. For example, *“Hello, at the tone leave your name, number, and a good time to call. (tone plays).”*

## Record Digits

The Record Digit Prompt allows callers to enter information in the form of digits. For example, *“Hello, please enter your age.”* (Digit(s) would then be entered).

## Live Voice Transfer

Live Voice Transfer will connect callers to an operator or other predetermined phone number. To utilize Live Voice Transfer predetermine 1) what phone number will callers be transferred too, and 2) what key(s) will the caller enter to be transferred.

For example, instruct callers to press *“\*\*”* or *“1234”* to be transferred. *Please note that “#” cannot be used as a transfer key.*

Enter the information in the **Live Voice Transfer Key(s)** box and the **Live Voice Transfer Number** box. Next, broadcast the **Live Transfer Key(s)** to callers using a Prompt.



**Please note: Live Voice Transfer will not function without Three Way Calling. If you experience problems using Live Voice Transfer please contact USIC Technical Support, your phone system may require additional keys to be entered to utilize Three Way Calling.**

## What is the difference between Speaker/Microphone Recording and Telephone Line Recording?

Your VBS Telephony Server provides two methods for recording prompts, Speaker/Microphone and Telephone Line.

## **Speaker/Microphone**

The Speaker/Microphone method involves recording prompt(s) through the microphone and listening to recording(s) through the speakers.

- To record prompt(s), press **Record**.
- To end recording press **Stop**
- Press **Play** to listen to the recorded message through the speakers.

## **Telephone Line**

To use the Telephone Line recording method you will need two available analog phone lines in addition to one non-cordless telephone. In Telephone Line recording, an outbound call will be placed to the second available number.

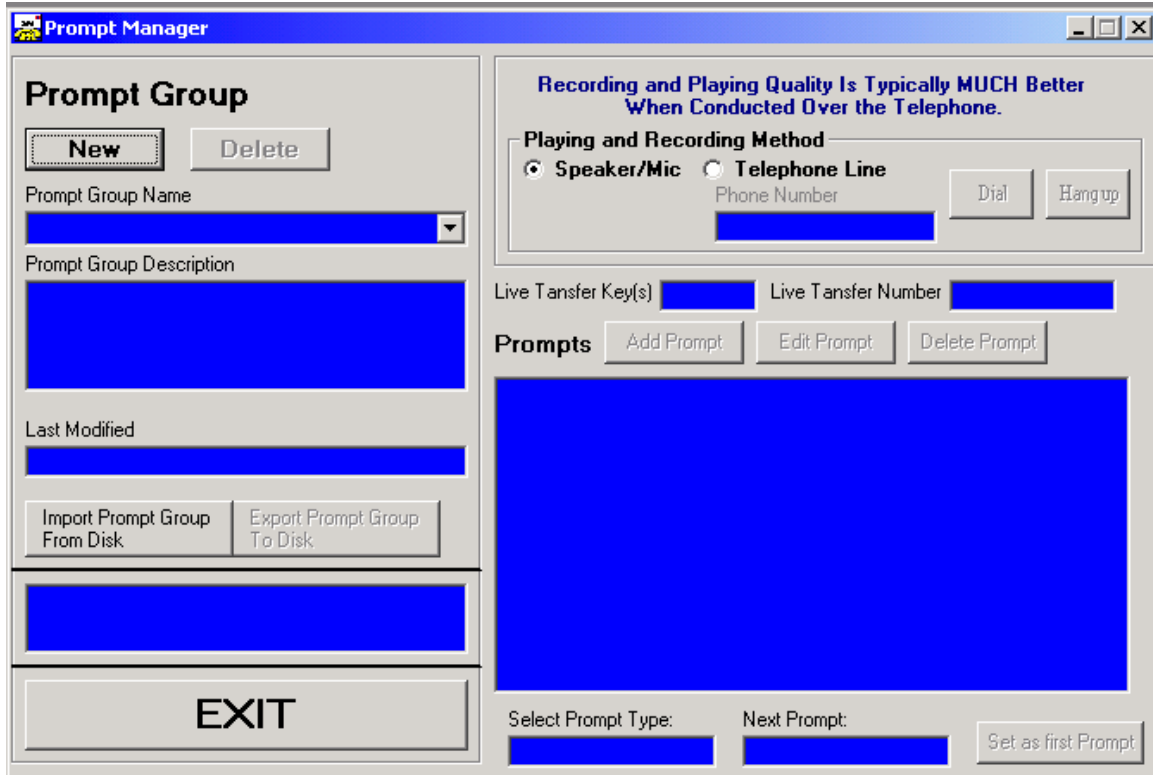
- Connect a telephone line to Line 1 of the telephony card
- To dial the second number, enter the phone number in the **Phone Number** box and press **Dial**.
- When the phone rings pick it up and say "Hello". This will cause the phone to act like a microphone
- To begin recording, click **Record**, wait for the tone from the telephone handset and then begin recording the message into the telephone
- To finish recording press **Stop**.
- Playback your recording through the telephone by pressing **Play**.
- Upon completing the recording(s), press **Hang Up** and then hang up the telephone.

*Please Note: For optimal recording quality, USIC recommends using the Telephone Line Recording method.*

## **Now What?**

### **Creating a New Prompt Group**

Open the Prompt Manager module by clicking the **Prompt Manager** button on the Module toolbar. Now that the module is open, press **New** to start constructing the Prompt Group.



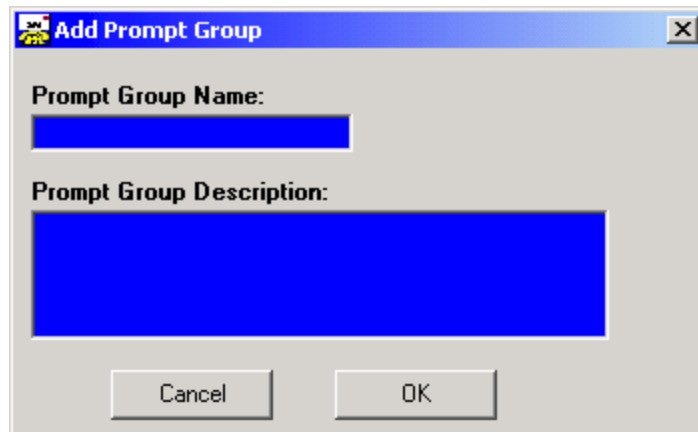
After pressing **New**, enter a name and description for the Prompt Group in the *Add Prompt Group* window. Please note: Only letters, numbers, spaces and underscores are allowed in the **Name** and **Description** boxes.

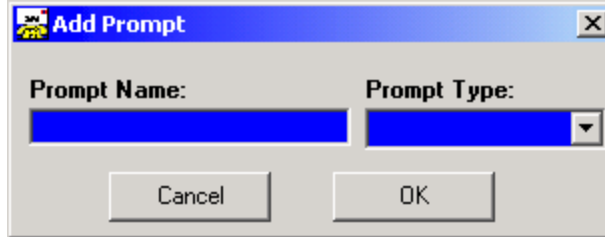
Each Prompt Group must have a distinct name, even if you delete a Prompt Group you will not be able to use the Prompt Group name again.

Press **OK** when you have finished entering in the Prompt Group name and description.

### **Adding Prompts**

Next, add the individual prompt sections. To add a prompt press the **Add** button, the *Add Prompt* window will open:



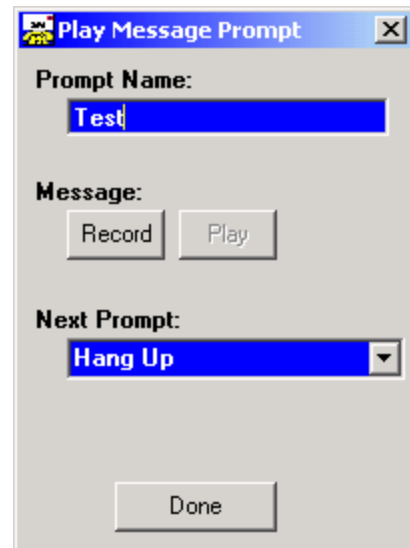


## ***Recording the Prompt and Setting Features***

Depending on the **Prompt Type** selected, a window will open that will allow you to make recording(s) and set prompt features. Although each prompt type is different, the recording process is the same. Record the prompt by pressing **Record**. To finish recording, press **Stop**. To listen to the recorded message press **Play**. You can rerecord a prompt as many times as needed.

### **Play Message**

The play message prompt will broadcast a message to callers.

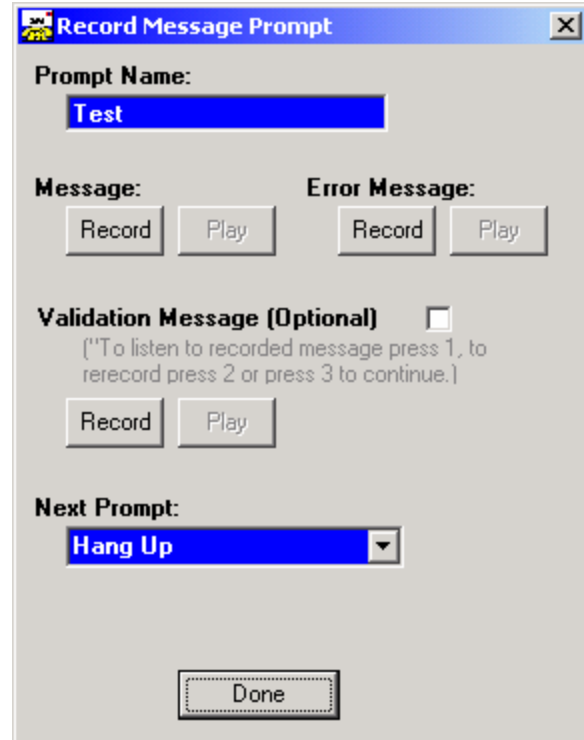


## Record Message

The record message prompt will instruct callers to leave a message.

The record message prompt will also allow callers to playback their recorded message and rerecord the message if necessary. By default the **Validation Message** is not active, to activate this feature select the check box next to **Validation Message (Optional)**.

The **Error Message** portion of the Record Message prompt will play an error message you record if the caller does not correctly record or rerecord a message.



The screenshot shows a dialog box titled "Record Message Prompt" with a close button (X) in the top right corner. The dialog contains the following elements:



- Prompt Name:** A text input field containing the word "Test".
- Message:** A section with two buttons: "Record" and "Play".
- Error Message:** A section with two buttons: "Record" and "Play".
- Validation Message (Optional):** A section with an unchecked checkbox and a text description: ("To listen to recorded message press 1, to rerecord press 2 or press 3 to continue."). Below this are two buttons: "Record" and "Play".
- Next Prompt:** A dropdown menu currently showing "Hang Up".
- Done:** A button at the bottom center of the dialog.

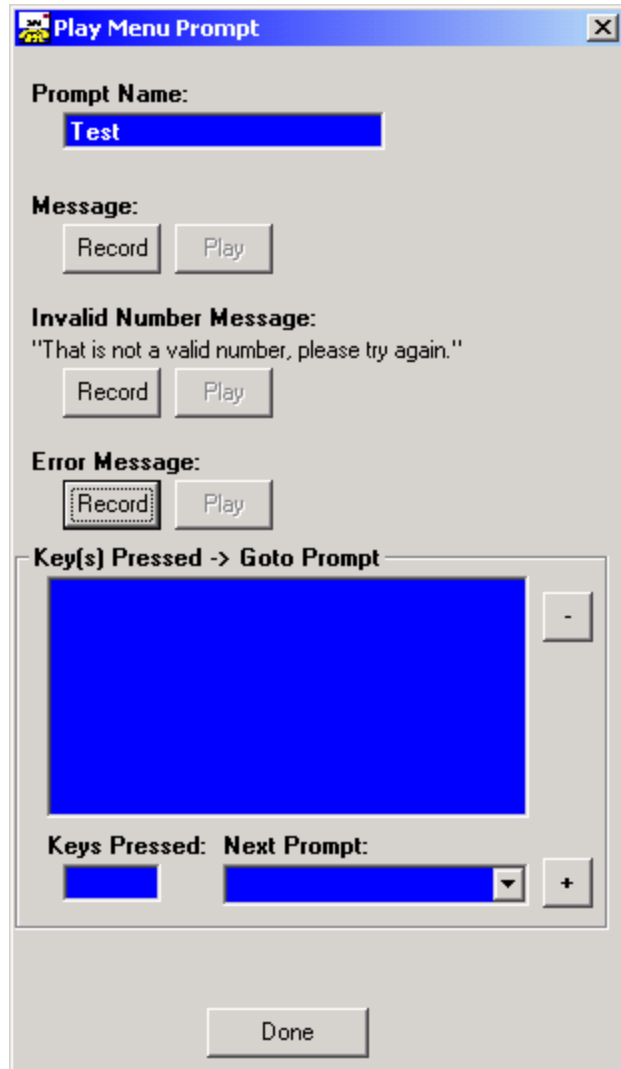
### Play Menu

The Play Menu prompt allows callers to chose options (prompts) by pressing predefined keys.

After recording the initial message, you have the option of recording the **Invalid Number Message**, which is played when a caller enters a key not predefined, and the **Error Message**, which plays prior to the call ending due to invalid response(s).

To match a digit with a prompt, enter the digit (1-9) in the **Key Pressed:** box and then select the prompt that will be played when the digit is pressed in the **Next Prompt:** box (the default next prompt is Hang Up). With this

information entered press the  button to add the digit and prompt to the **Key(s) Pressed -> Goto Prompt** window. To remove a prompt-key combination, highlight the selection and press .

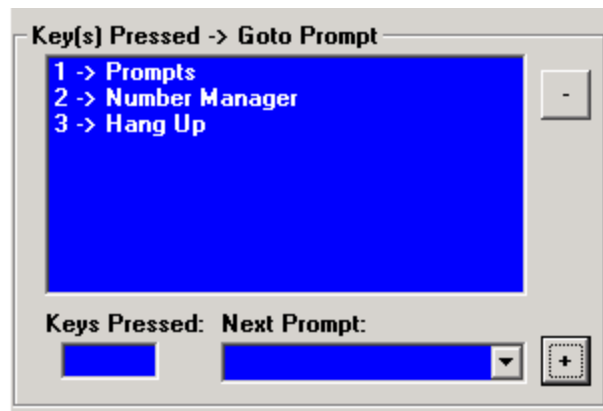


The following is an example of how to structure a test **Play Menu** prompt:

**Message:** *"Hello, for information on creating Prompts press 1, for information on the Number Manager press 2, to end this call press 3."*

**Invalid Number Message:** *"You may only press 1, 2 or 3."*

**Error Message:** *"This call will now end, Thank You"*



## Record Digits

The Record Digits prompt records a response in the form of numbers generated by the keypad.

After recording the initial **Message**, define the advanced features of the Record Digit prompt.

The **Min Error Message** can be recorded to inform callers they have entered too few digits. Once you determine the number of digits callers will need to enter you can enter the minimum number of digits accepted and the maximum number of digits accepted in the **Min Digits:** and **Max Digits:** boxes.

The **Invalid Number Message** informs callers they have entered a digit that is not accepted. Specify which digits and characters are accepted by using the **Allow Following digits:** box. Place a check mark next to each number and character callers can enter.

The following is an example of how you may want to construct a test Record Digit Prompt:

**Message:** *"Hello, please enter your age."*

**Min Error Message:** *"You must enter at least one digit."* Set the **Min Digits:** to 1 and set the **Max Digits:** to 2.

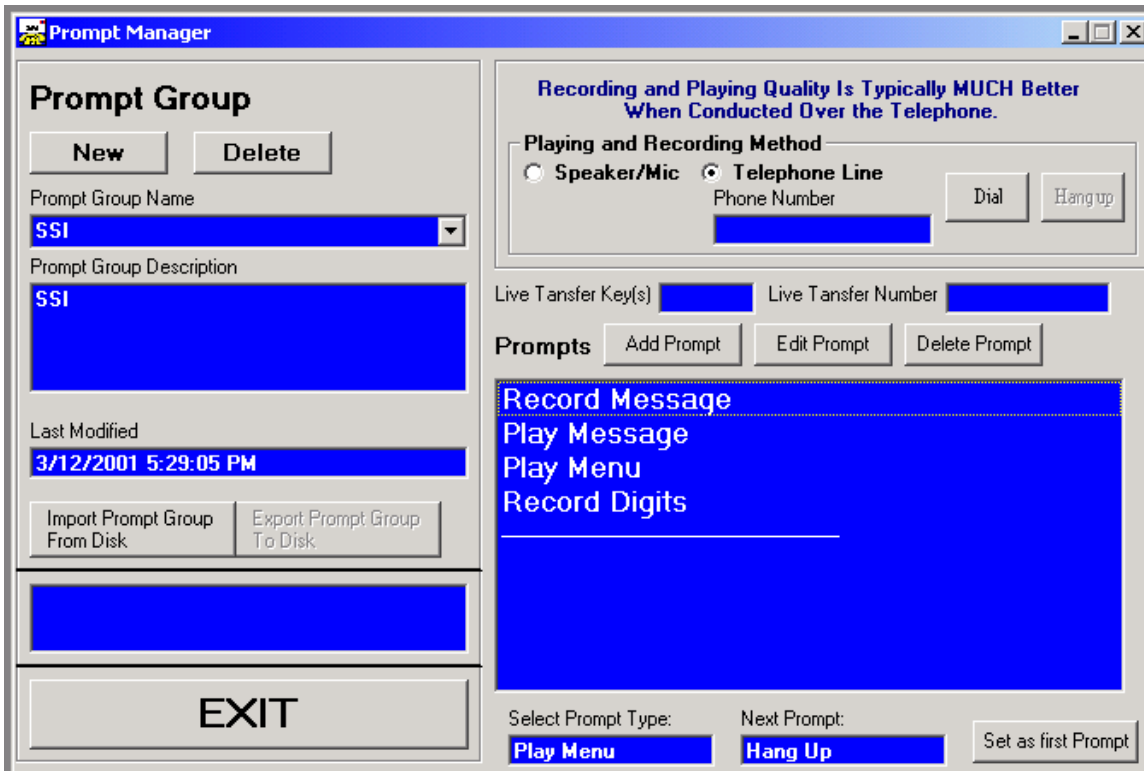
**Invalid Number Message:** *"You may only enter numbers 1-9 and 0."* Check all selections except \*(star).

## Prompt Play Order

To determine the order in which prompts play, set the Prompt Play Order. The following example will illustrate how to set the Prompt Play Order:

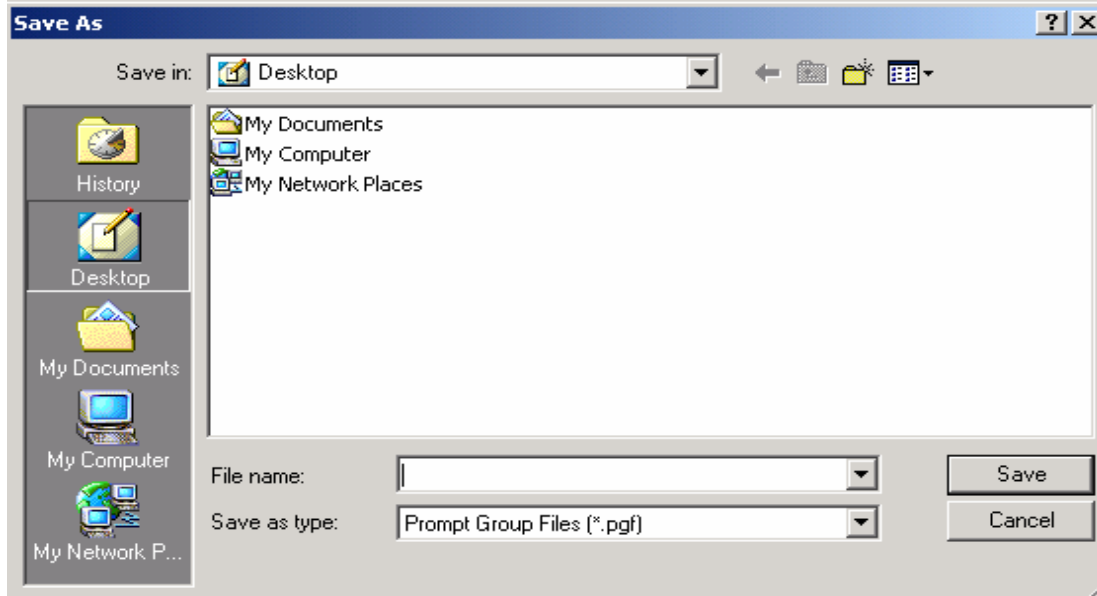
A Prompt Group is created named USIC; within the USIC Prompt Group you have 4 prompts named *Play Message*, *Record Message*, *Record Digits*, and *Play Menu*.

First, determine which prompt will be played first, this is done by selecting the prompt you want played first, in this example *Record Message*, and then pressing **Set as First Prompt**. By pressing **Set as First Prompt**, a line will appear under the prompt that will play first. To set the second prompt, open the initial prompt, *Record Message*, by highlighting the prompt and clicking **Edit Prompt**. Set the **Next Prompt** box to the name of the prompt you want played next, *Play Message*. To set the prompt that will play third, select the prompt in second position, *Play Message*, press **Edit Prompt** and set **Next Prompt** to the prompt to be played third, *Play Menu*. Finally to set the prompt that will be played last, *Record Digits*, select the prompt in third position, *Play Menu*, click **Edit Prompt** and then set the **Next Prompt** to the prompt you want played last, *Record Digits*. There is no need to set the **Next Prompt** on the last prompt played, the default, Hang Up, will end the call. When finished the Prompt Group will match the following screen:



## Exporting Prompt Groups

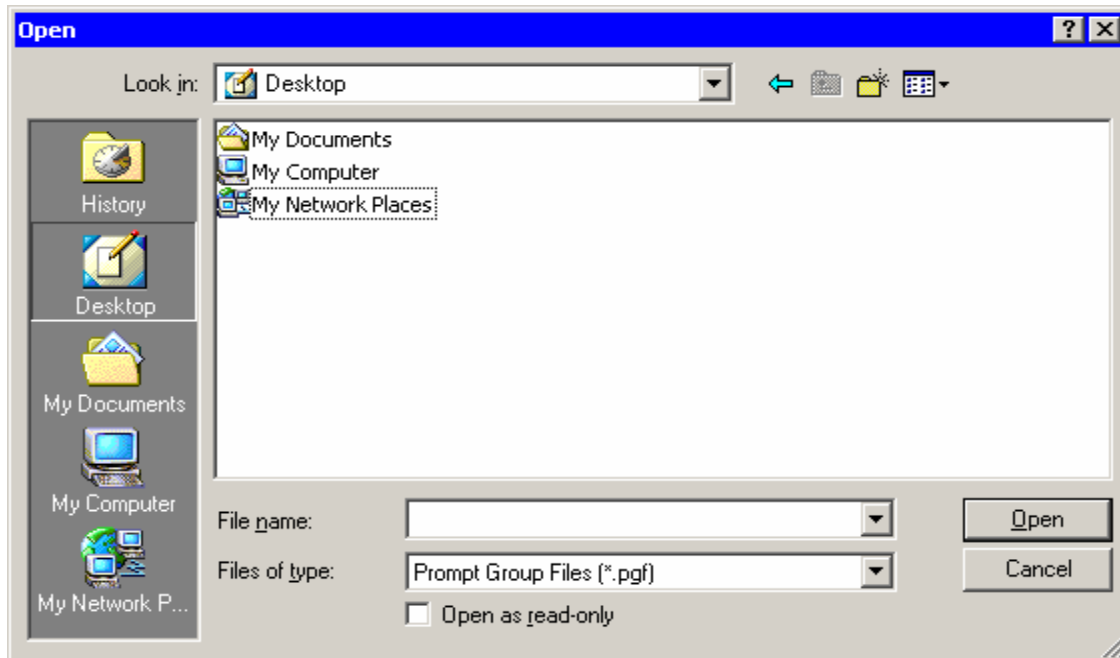
As with any application it is always a good idea to back up files periodically. To backup a Prompt Group, press **Export Prompt Group to Disk**. From the Save As window determine where to save the Prompt Group, enter a name for the



Prompt Group, then press **Save**.

## Importing a Prompt Group

To import a Prompt Group previously backed up, press **Import Prompt from Disk**. From the *Open* window, locate the Prompt Group to import, press **Open**.



## Chapter Four: Using the Dial Manager

### Overview

A Dial Job links the Prompt Group, the phone numbers to be dialed, and the Line Module(s) together.

To create a dial job answer the following questions:

- Which Prompt Group(s) will be played during outbound calling?
- Which Line Module will carry out the Dial Job?
- Which dialing method will be used, *Number*, *Contact* or *Test*?
- What dialing modifiers are needed?

The screenshot shows the 'Dial Manager' application window. The window title is 'Dial Manager'. On the left side, there is a 'Dial Job' section with a 'New' button and a 'Delete' button. Below these are fields for 'Job Name' (a dropdown menu), 'Job Description' (a large text area), and 'Last Modified' (a text field). At the bottom of this section is a large 'EXIT' button. On the right side, there are several configuration options: 'Dialing Method' (a dropdown menu with a 'Set' button), 'Predial Modifier' (a text field), 'Postdial Modifier' (a text field), 'Prompt Group to play on Live Voice:' (a dropdown menu), 'Prompt Group to play on Answering Machines or Extended Answers:' (a dropdown menu), 'Number of Redials Attempts:' (a dropdown menu), 'Redial Every XX Minutes:' (a dropdown menu), 'Reset Busy:' (a checkbox), and 'Add Job To Phone Line' (a dropdown menu).

## Create a Dial Job

### Name Your Dial Job

Press **New** and enter a name and description for the Dial Job. Please note: Only letters, numbers, spaces and underscores are allowed in the **Name** and **Description** boxes.

### Dialing Methods

Select which Dialing Method to use:

- Number Method
- Contact Method
- Test Method

### Number Method

The Number Method uses ranges of telephone numbers for outbound calling. To use the Number Method select **Number** from the **Dialing Method** pull down menu, then press **Set**. The *Number Dialing Method* window will open. Enter the number ranges to dial or exclude from dialing.

Use the Increment feature to space out calling in blocks of 1, 10, 20, 30, 40, 50, or 60.

For example, to call the number range 555-555-1000 to 2000 insert these values in the **Include Suffixes** boxes and then press **Include**. To exclude the 1100 to 1200 range of suffixes, insert 555-555-1100 to 1200 in the **Exclude Suffixes** boxes and the click **Exclude**. With the number ranges entered increment calling by selecting a value from **Increment**. By default, numbers will increment sequentially.

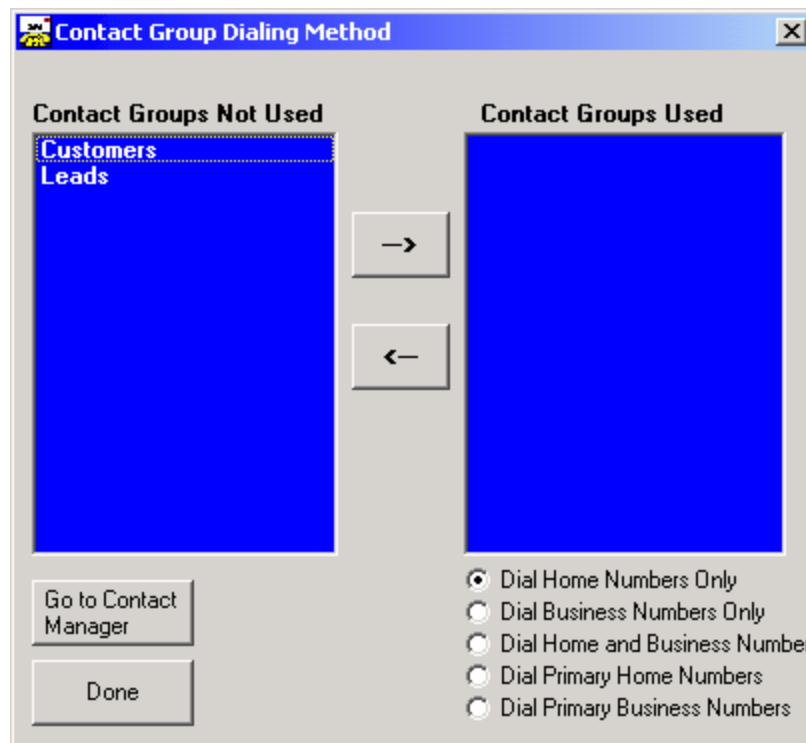
555-555-1000  
555-555-1001  
555-555-1002

By selecting an Increment of 10, numbers would be dialed in the following order:

555-555-1000  
555-555-1010  
555-555-1020

## Contact Method

The Contact Dialing Method dials phone numbers stored in the **Contact Manager**. To use the Contact Dialing Method select **Contact** from the **Dialing Method** pull down menu, then press **Set**, the *Contact Group Dialing Method* window will open. In order to use the Contact Dialing Method, contacts have to be assigned to a specific group, to create a group press **Go to Contact Manager**.



Highlight the group to call in the **Contact Groups Not Used** and then use the



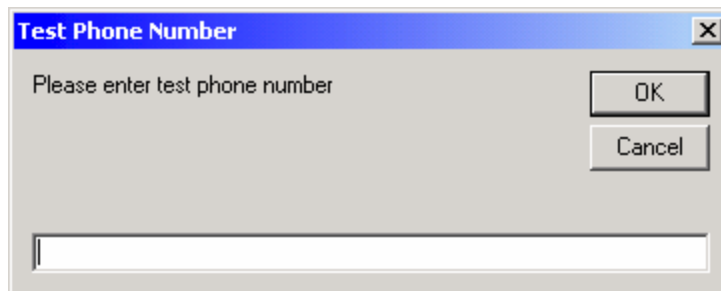
button to move the group onto the **Contact Groups Used** window.

Next, select which of the contact's phone number(s) to dial.

- **Dial Home Number Only** will only dial the number listed in the Home Number box of the contact
- **Dial Business Number Only** will only dial the number listed in the Business Number box of the contact
- **Dial Home and Business Numbers** will dial both the Home and Business Number of the contact
- **Dial Primary Home Numbers** will first attempt to dial the contact's Home Number, if unsuccessful will then attempt to dial the contact's Business Number
- **Dial Primary Business Number** will first attempt to dial the contact's Business Number, if unsuccessful will then attempt to call the contact's Home Number

### Test Method

The Test Method provides a way to test Prompt Groups and Dial Job details before starting a large scale Dial Job. To use the Test Method select **Test** from the **Dialing Method** pull down menu and press **Set**. In the *Test Phone Number* window enter the phone number to dial.



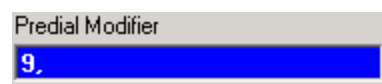
Once the Dial Job is started, the test phone number will be called repeatedly until you stop the Dial Job.

### Assign Calling Modifiers

Specify any additional dialing rules, specific to your location by entering values in the **Pre Dial Modifiers** and **Post Dial Modifiers** boxes.

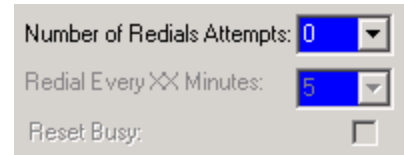
- Enter any pre dial modifiers in the **Pre Dial Modifiers** box, for instance, dial 9 to reach an outside line or \*67 to block caller-id.
- Enter and post dial modifiers in the **Post dial Modifiers** box

Please note: After entering in a Pre/Post Dial Modifier follow the value with a comma (,).



## Busy Numbers

If during dialing a busy number is reached, specify how many times the busy number should redialed and at what increment it will be retried. By default busy numbers are not redialed, to redial busy numbers determine the number of redial attempts in the **Number of Redial Attempt** pull down menu and the increment the busy numbers will be retried in the **Redial Every XX Minutes** pull down menu.



If multiple Dial Jobs are set on one Line Module, selecting **Reset Busy** will clear out all busy numbers from the previous Dial Job. By leaving **Reset Busy** unchecked, the previous Dial Job's busy phone numbers will be retried during the new Dial Job.

## Assign Prompt Groups

Next, determine which Prompt Group will play on Live Voice answer and which Prompt Group will play on Answering Machine/Extended Answer. You can assign the same Prompt Group to play on both or assign different Prompt Groups. To select a Prompt Group for Live Voice Answer, use the **Prompt Group To Play on Live Voice**: pull down menu and select the correct Prompt Group. To select a Prompt Group for Answering/Extended answer, use the **Prompt Group to play on Answering Machines or Extended Answers** pull down menu and select your Prompt Group.



**Please note that by leaving either Live Voice and/or Answering Machine/ Extended Answer blank (signified by None) no prompt will be played.**

## Assign to a Line

Each Dial Job must be assigned to a Line Module. To assign a Dial Job to a Line Module select the number of the Line Module from the **Add Job to Phone Line** pull down menu and the press **Add Job to Phone Line**.




**Please note that if you do not press Add Job to Phone Line, the Dial Job will not be assigned to a Line Module.**

## Modifying your Dial Jobs

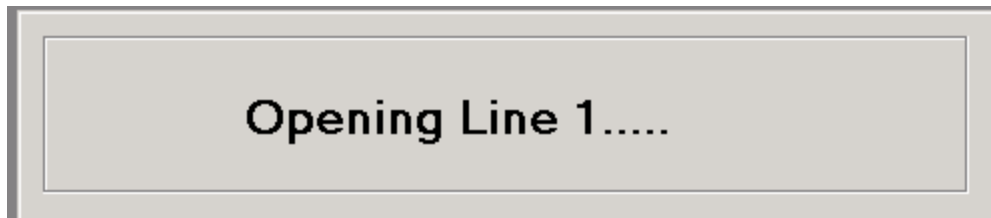
Once you have assigned a Dial Job to a Line Module, USIC recommends not changing any aspects of the Dial Job, instead if you make a mistake or need to change a setting, create a new Dial Job.

## Chapter Five: Using the Line Module(s)

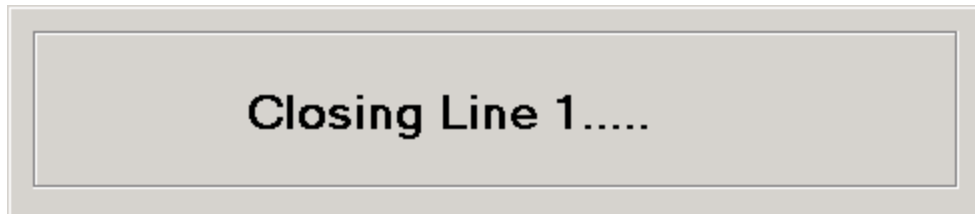
### Opening and Closing Lines

The Line Module(s) oversee all dialing activity on the Telephony Server. The number of lines your Telephony Server contains determines the number of Line Modules contained in the VBS application. The VBS application will allow you to open and close lines both independently and together using the **Line** menu in the toolbar.

To open the Line Module(s) either select the individual line to open, **Open Line X**, or select **Open All Lines**. Each Line Module will open separately, with the opening of each Line Module signaled by the appearance of the following window:



To close an individual Line Module select **Close Line X** from the **Line** Menu in the toolbar, to close all lines select **Close All Lines** from the Line Menu in the toolbar. Each Line Module that closes will display the following window:



**Warning: If a Line Module is placing or receiving a phone call, under no circumstance should you close the Line Module using the Line Menu or Task Manager End Process command. Instead use the Stop button on the Line Module, wait until the line is hung-up, and then close the line using the Line menu.**

## Starting and Stopping

Once assigned to a Line Module, the name of the Dial Job will appear in the **Scheduled Job** box. If more than one Dial Job is assigned to a Line Module, the Dial Jobs will be called in the order in which they were assigned.

To start the Dial Job(s) press **Start**. Text will start to appear in the **Trace Box**, this is a visual display of call activity; what number is being dialed, what prompt is being played, is a message being recorded, etc. To clear this text press **Clear**.

To stop a Dial Job that has not finished press **Stop**.



**Please note that the Dial Job will not stop immediately, instead the current number dialing will finish and then the Dial Job will stop.**

When a Dial Job has finished, a message will appear in the **Trace Box**.

## Inbound Calling

The Telephony Server can be used to receive inbound calls; to utilize this feature select **Play Prompt Group On Incoming Calls**, then select the Prompt Group to play from the pull down menu. To save the Prompt Group selected press **Save Settings**. Now, whenever an inbound call is received the selected Prompt Group will play, there is no need to press **Start** to begin inbound calling.

## Remote Lead Checking

To remotely listen to leads select **Play Leads on Incoming Call** and enter in a four-digit password (default password is 1234). Each time you select **Play Leads on Incoming Call** or change the password press **Save Settings** for the changes to take effect.

Now when you call the phone number for the Line Module that has **Play Leads on Incoming Calls** selected you will hear a brief period of silence after the call connects, enter in the password using the keypad. The menu options for remote lead checking are as follows:

- Press Four to listen to the previous Lead
- Press Five to listen to the current Lead again

- Press Six to go to the next Lead
- Press Seven next to add a Lead's number to the Number Manager
- Press Eight to delete the current Lead
- Press Nine to start over from the beginning

## Additional Features

The Line Module also contains the Dialing Schedule. To open the Dialing Schedule press **Schedule**. The Dialing Schedule sets what days and times the Telephony Server places outbound phone calls. The default schedule is Sunday through Saturday, from 9:00am to 9:00pm.

The count of numbers dialed will appear in the **Number Called** window.

To remove a Dial Job from the **Scheduled Job** window press **Remove**.



***Never remove a Dial Job in progress; always stop the Dial Job first by pressing Stop.***

By default the **Call Tracing** box is checked, Call Tracing saves a systematic analysis of all calling, both inbound and outbound, to a log file specific to each Line Module. Do not delete the Call Tracing log(s) unless instructed by USIC Technical Support.

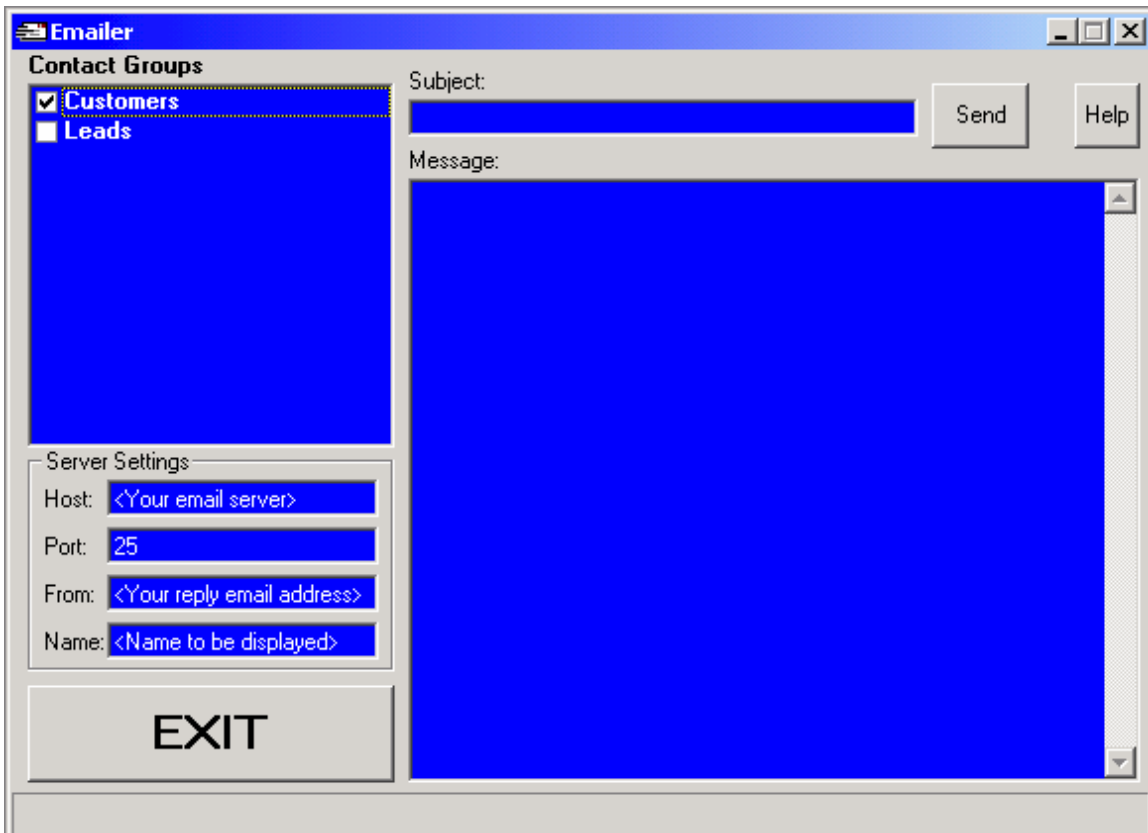
## Chapter Six: Using the E-mailer

### Before you Begin

The E-Mailer will allow you to send text/html-based emails to contacts. To use the E-Mailer you will need to connect to the Internet at the time the email is being sent. Before using the E-Mailer, you will need to obtain the following:

- An account with an Internet Service Provider (ISP).
- The address of the ISP's outgoing mail server, for example [smtp.someisp.com](mailto:smtp.someisp.com). (The name of the ISP's mail server can be obtained by visiting your ISP's homepage or by calling your ISP's technical support).
- An email address with the ISP, [VBS@someisp.com](mailto:VBS@someisp.com).

Once you have the above, you will need to enter or import the email addresses of your contacts into the Contact Manager and assign the contacts to a group. Contact Groups will automatically appear in the **Contact Groups** window when you open the E-Mailer module. To select a group to receive email, place a check mark next to the Contact Group:



## Server Settings

Before sending an email, enter your mail **Server Settings**:

### **Host:**

- Enter the name of the ISP's outgoing mail server, for example [smtp.someisp.com](mailto:smtp.someisp.com).

### **Port:**

- The Telephony Server's link to the outgoing mail server, the default port is 25.

### **From:**

- Enter in the sender's email address.

### **Name:**

- Enter the name to display to contacts.

### **Subject:**

- Enter a headline for the email message.

### **Message:**

- Enter the message in either text or html format.

## Sending Emails

Once the **Server Settings** are completed, and a connection to the Internet is present through your ISP, press **Send**. Be aware that you should not Exit the E-Mailer until the **Done Sending e-mail** prompt appears. Although it may seem the Telephony Server is not responding the send email process may be in progress. A variety of factors can influence the time it takes to send emails, including the number of emails in a Contact Group, the speed of your Internet connection, and general Internet traffic.

## Chapter Seven: Using the Contact Manager

### Overview

The Contact Manager stores contacts used in both outbound dialing and emailing. The Contact Manager consists of three levels, the actual contact, the group(s) a contact belongs to, and the category. Each level will be examined in the following sections in addition to customizing the Contact Manager to meet your specific needs.

### What is a Category?

By default, the Contact Manager has one Category, **Main Contacts**, viewable through the **Category Name** pull down menu. Create Contacts within the default Category or create new Categories. To create a new Category press **New** (underneath the **Contact Manager** heading).

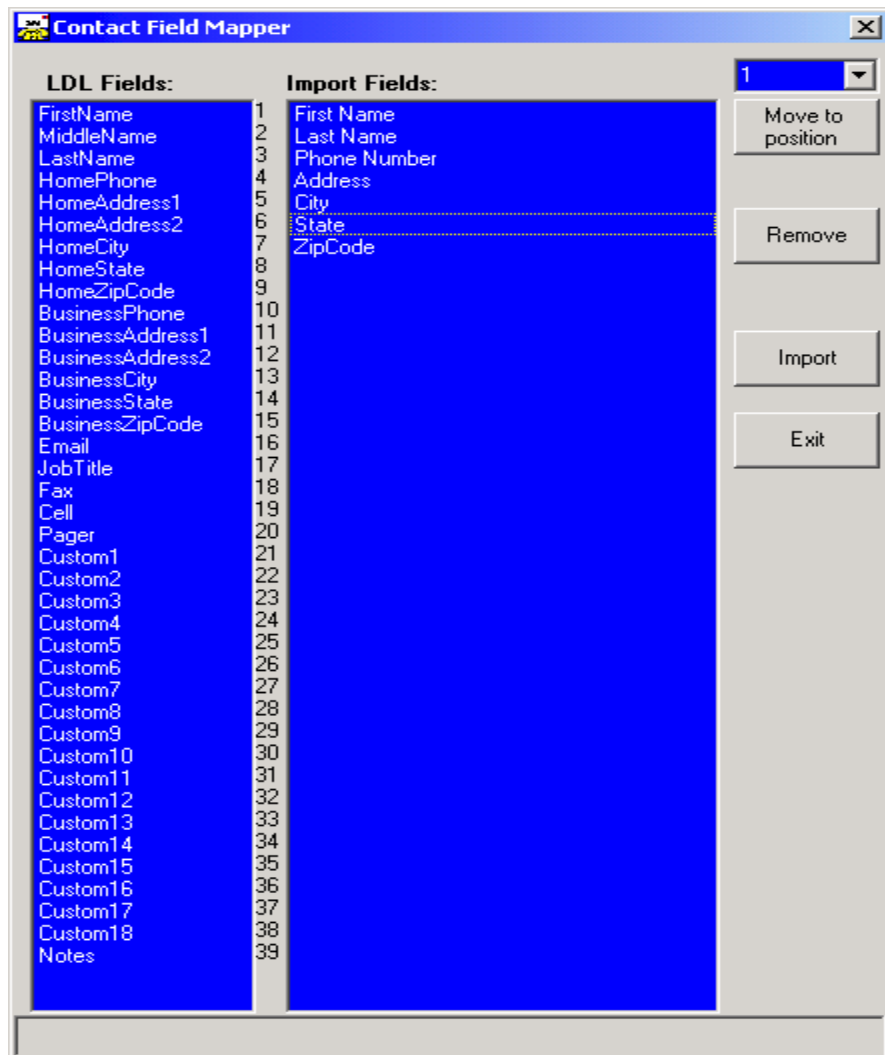
Since contacts can only belong to one Category, the Move feature allows you to move a contact from one Category to another. To use the Move feature complete the following:

- Highlight the contact to move in the Category display window
- Select the Category to move the contact to using the pull down menu next the **Move** button
- Press **Move**
- The contact will move to the new Category

## Importing

To populate a Category you can either manually enter each contact or import a list of contacts. To import a list of contacts complete the following steps:

- 1) Select the Category you want to import the contacts into by using the **Category Display** pull down menu or create a new Category
- 2) Press **Import**
- 3) Locate the file containing the contacts you want to import, the contacts must be saved in a file that contains column headers



- 4) The *Contact Field Mapper* will open displaying the fields available in the Contact Manager and the fields available in the imported file. If there are no fields listed in the **Import Fields** the file may not be in the correct format, contact USIC Technical Support for further assistance.
- 5) The *Contact Field Mapper* will allow you to arrange the **Import Fields** with the **VBS Fields**. To match the headings in the **Import Fields** with the **VBS Fields**, select the field in the **Import Fields** window; identify the position to move the field to in the **VBS Fields** (5,12, 30, etc.). Then use the Move Position pull down menu to enter the number and press **Move to Position**.
- 6) The heading contained in the **Import Field** will move into position next to the selected heading in the **VBS Field**. Repeat the moving process until all **Import Fields** are matched correctly to the **VBS Field**.
- 7) To conclude the import process press **Import**. This will begin the migration of contacts from the file to the Contact Manager. You can track the progress of the import process at the bottom of the Contact Manager.



**Warning: USIC does not recommend stopping the import process once underway. Furthermore, during the import process it may seem as though your Telephony Server is “frozen” or “not responding.” This may be occurring due to the number of contacts you are trying to import. USIC recommends letting the Telephony Server finish the import process before restarting the Telephony Server or using the Task Manager to end the process.**

## **Export**

The export function allows you to save contacts contained in a Category into a Comma Delimited (\*.csv) file with headers. To begin exporting, select the Category to export using the **Category Display** pull down menu, then press **Export**. You will be prompted to enter a name for the exported file and a location to save the file, press **Save**.

## **Searching**

If a Category contains several contacts, the search function can quickly find a contact or contacts.

- Select the Category to search using the **Category Display** pull down menu.
- In the **Field** window, select which field to search (Fname, Lname, Email, Custom1, etc.).

- In the **Value** field, enter the value for the search (405-516-2420), U.S. Infotel Corp., etc.).
- Select how you want to query the contacts, using the >, <, =, like, and Starts with operators
- To conduct the search, press **Search**
- To view all contacts in a single Category press **Show All**. Please note: Contacts are displayed in groups of 12; use the arrows to move between groups of contacts.

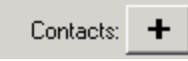

## What is a Group?

While a Category contains all contacts entered manually or imported, a Group can contain contacts from multiple Categories. Groups are an essential part of the Contact Manager because Groups determine the phone numbers called in the **Contact Dialing Method** and determine the emails used in the **E-Mailer**.



### Adding a Group


To build a Group press , enter a name for the Group and press **OK**. The Group will now appear in the **Contacts Group** window. To delete a group, press  in the Group window. *Please note: Deleting a Group will not delete a contact.*

### Adding a Contact to a Group

To add a contact to Group, highlight the contact in the specified Category, highlight the Group, then press . To delete a contact from a Group, highlight the contact within in the Contact window and press .

### Adding a Category to a Group

To convert a Category into a Group, use the  button. Select the Category to move into a Group, highlight the Group, and then press . All of the contacts contained in the Category will then be moved into the specified Group. *Please note: Depending on the amount of contacts contained in a Category, the import process may take anywhere from a few seconds to a few minutes.*

To remove all of the contacts contained in a highlighted Group, press .

## Contacts

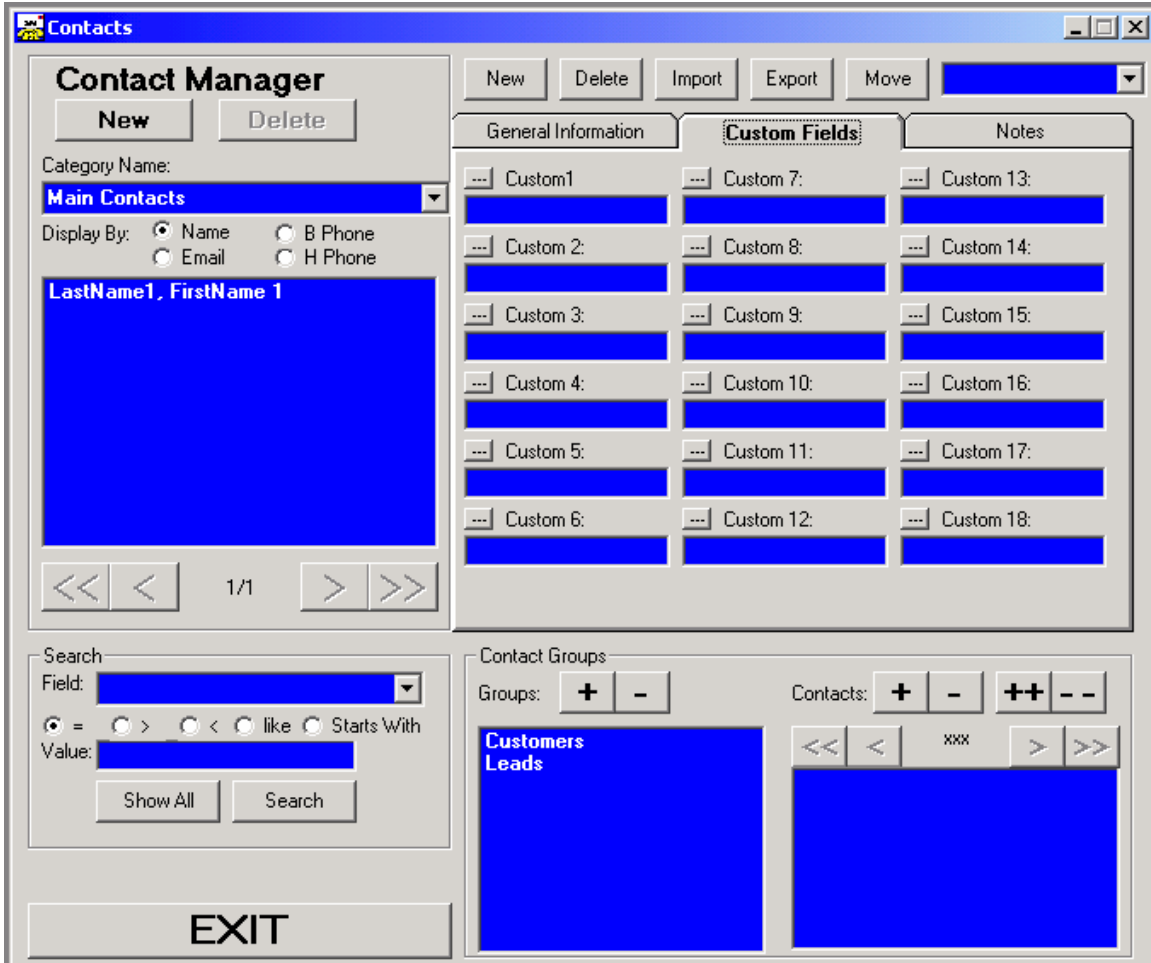
### ***New Contact***

Contacts are the individual records that comprise the Contact Manager. Each Contact is a part of a Category and can be assigned to multiple Groups.

- To enter in a new contact select the Category that the Contact will belong to or create a new Category
- Press **New** (located above the **General Information** tab)
- Upon pressing **New** you will see the **First Name** and **Last Name** field on the **General Information** tab populate with *First Name#* and *Last Name#*
- The same information is displayed in the Category display window, *LastName#,FirstName#*.
- Enter in all relevant information, overwriting the default information in the **First Name** and **Last Name** fields.

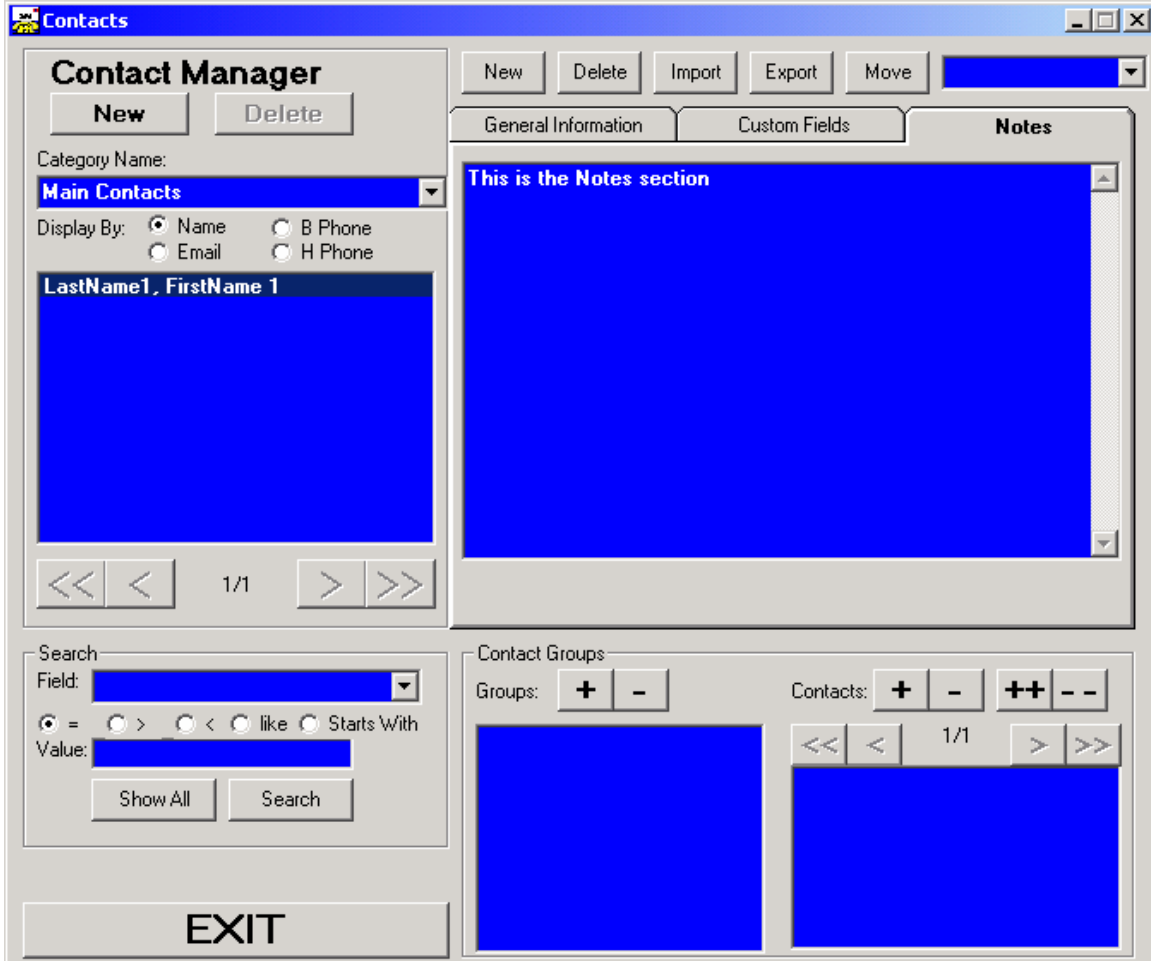
### ***Customizing***

Customize the fields on the **Custom** Tab to contain information specific to your contacts. In total, there are 18 custom fields; each field can be renamed with up to a 16-character name. Keep in mind that changes made to one custom field on one Contact will impact all Contacts in all Categories



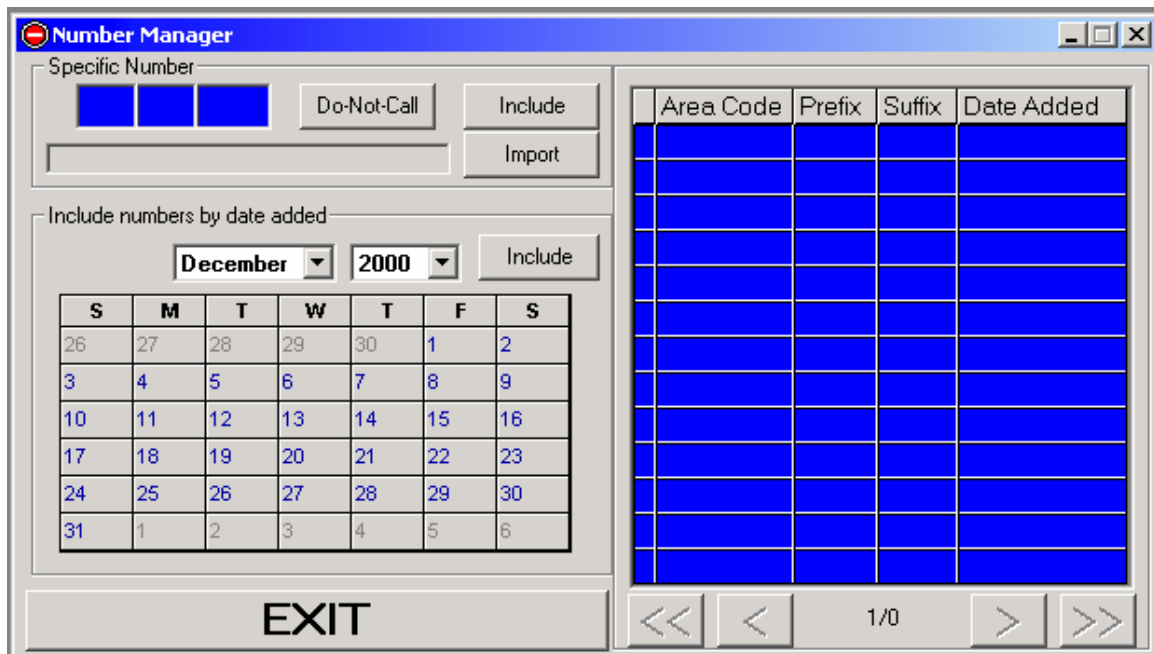
**Notes**

The **Notes** tab will allow you to enter notes for each Contact.



## Chapter Eight: Using the Number Manager

The **Number Manager** excludes specific numbers from future callings. Numbers can be excluded by manually entering the number or by importing a compiled list of numbers. In addition, numbers can be re-included back into the calling cycle by using the include by date and include manually features.



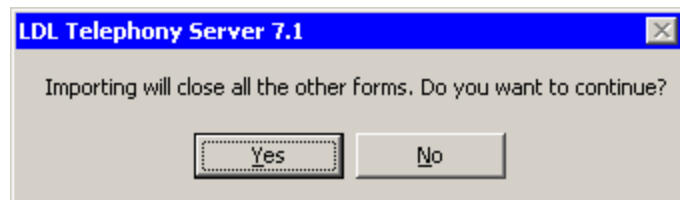
### Excluding

#### *Manually*

To manually exclude a single number enter the area code, prefix and suffix in the **Specific Number** boxes. Once entered, click **Do-Not-Call**, the number will then appear in the Number Manager grid broken down by Area Code, Prefix, Suffix and Date Added. The Number Manager grid will display 12 excluded numbers at one time, if there are more than 12 excluded numbers use the arrow buttons to scroll through the groups of excluded numbers.

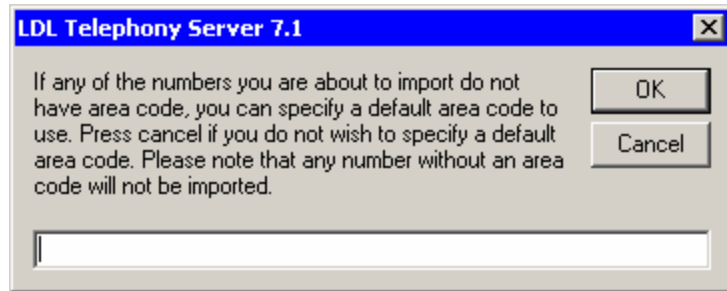
#### *Importing*

If you have multiple numbers to exclude, the import function provides an efficient automated method for adding numbers to the Number Manager.



- To use the Import function, press **Import**.

- Press **Yes** on the prompt that appears warning that all modules will be closed including the Line Modules(s). Press **No** to cancel the import process.
- Next, if the list does not contain phone numbers with an area code, enter an area code for the numbers.
- If the list of numbers already contains an area code, leave the text field blank and press **OK**.



***Please note: Numbers will not be added to the Number Manager without an area code.***

- Locate the list of phone numbers in the *Open* window.
- Press **Open**
- The Import process will begin after pressing **Open**, with the progress of the import shown on the blue progress bar.

Depending on the number of phone numbers on the list, the import process may take anywhere from a few seconds to several minutes. To stop the import process while in progress, press **Stop Import**.

## Including

### ***Manually***

Excluded numbers can be re-included into the calling cycle by clicking on the number in the Number Manager grid and pressing **Include**.

### ***By Date***

To re-include numbers in the calling cycle by the date they were excluded, select the date you want to include on the calendar and press the **Include** button (next to the year display).

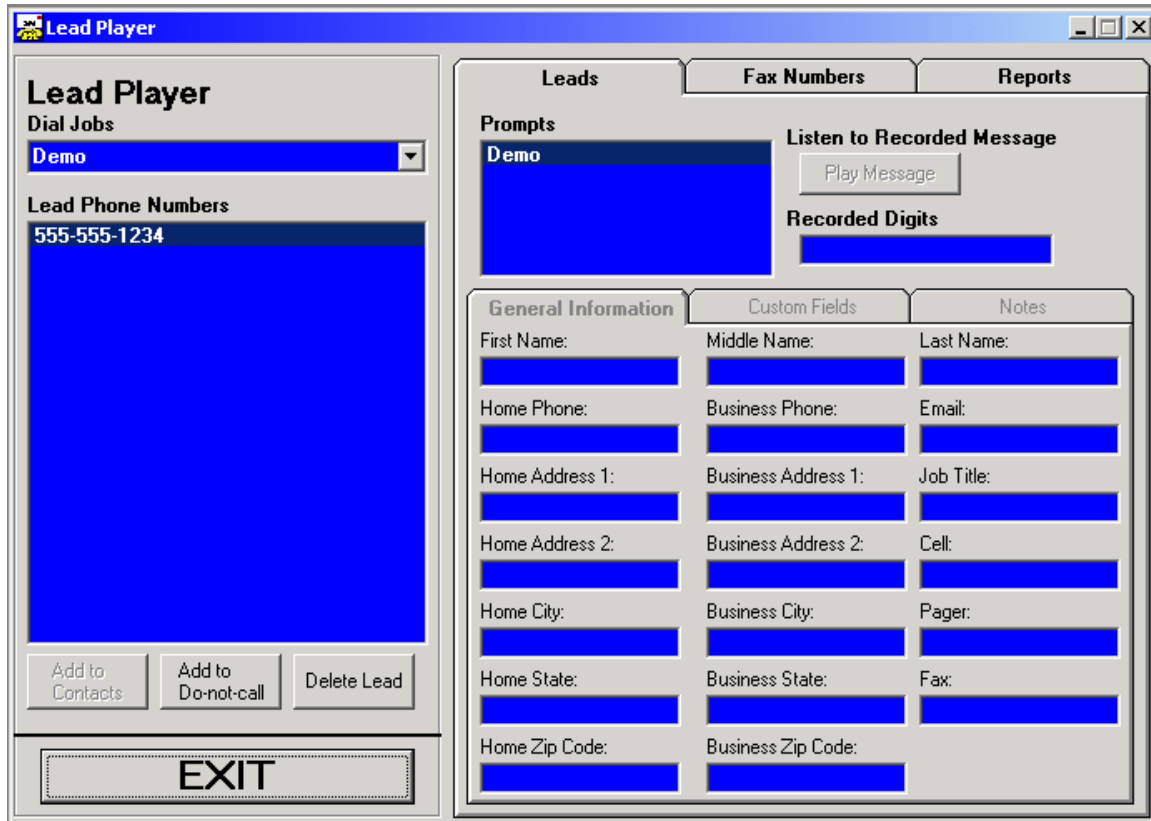


***Caution: All numbers excluded prior to and on the date you selected will be included back into the calling cycle.***

# Chapter Nine: Using the Lead Player

## Overview

The Lead Player stores and plays messages left by callers, compiles all phone numbers returned as fax numbers, and display calling activity reports. Open the Lead Player by pressing the **Lead Player** button in the module toolbar.



## Types of Leads

Leads come in two forms:

- Voice Messages from the Record Messages Prompt
  - Voice messages can be played by pressing **Play Message**
- Digit Based Messages from the Record Digit Prompt
  - The recorded digit will display in the **Recorded Digits** window

## Playing Leads

To check leads, select the Dial Job from the **Dial Job** pull down menu. Depending if any leads were left, you will see a list of phone numbers. If the Line Module(s) were set to receive inbound calls, select **Incoming Calls** from the **Dial Jobs** pull down screen to view any possible leads.

*Serious Technology from Serious People*

To listen to the recorded message or view the recorded digit, select a phone number from the **Lead Phone Numbers** list. Then, select the prompt you want to listen to or view from the **Prompt** window.

- If the lead is a voice message, the **Play Message** button will activate under the **Listen to the Recorded Message** heading. Press **Play Message** to listen to the lead, Press **Stop** to stop playback.
- If the lead is a recorded digit, the digit recorded will appear in the **Recorded Digit** window. An **xxxx** in the **Recorded Digit** window signifies the lead did not correctly enter in the required digit(s).

## Features

The following options are available in the **Lead Player**:

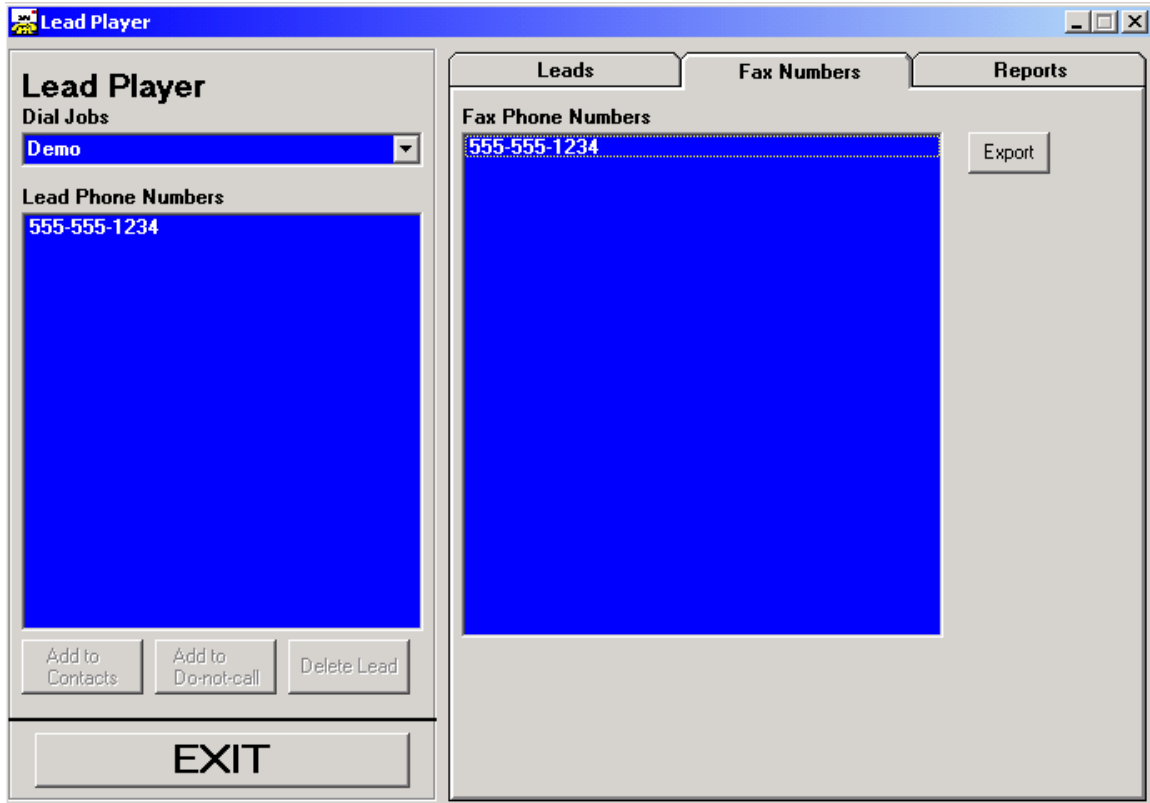
- To add the lead to the Number Manager, excluding it from future dialing, press **Add to Do-not-call**
- To add to the lead to the Contact Manager, press **Add to Contacts**, the *Add Lead to Contact* window will open prompting you to enter a **First name**, **Last name**, a **Category** for the new contact, and whether the number recorded is a **Home** or **Business** number. Press **Add** to add the contact the Contact Manager.
- To delete the lead press **Delete Lead**



**Caution: Deleted leads cannot be retrieved.**

## Fax Numbers

While making outbound calls the VBS application will detect if a number dialed is a fax machine. Detected fax numbers are stored in the Lead Player based on Dial Job under the **Fax Number** tab. To export detected fax numbers select the Dial Job from the **Dial Job** pull down menu and press **Export**. The fax numbers will be exported into comma delimited (\*.csv) file type.



## Reports

The **Report** tab of the Lead Player provides analysis of your calling activity.

### Lead Info

Press **Lead Info** from the **Reports** tab to view information on leads for all Dial Jobs. The report will be displayed in the report window and will return:

- The count of leads
- The percent leads of total numbers called
- The percent leads with total number of voice answers

### Live Answer

The Live Answer report shows the lead result and what prompt recorded the lead. The Live Answer report is Dial Job specific, select the Dial Job to view and press **Live Answer** (the **Live Answer** button will only activate if the Dial Job selected contains a lead). The Live Answer report is in table format containing the following information:

- Phone number of lead
- Prompt that recorded lead
  - If the lead was a voice message, the file path of the voice recording will be displayed.

- If the lead was a record digit message the recorded digit will be displayed

The Live Voice Answer Report can be exported into a Comma Delimited (\*.csv) file format by pressing **Export**.

### **Call Details**

The Call Details Report will display the calling activity for all Dial Jobs on a specific date. To use the report press **Call Details**, use the calendar to select the date to view, and then press **OK**.

The report will display in table format with the following columns:

- Number
- Type of Number (Home or Business)
- Start Time
- Duration (calls less than 1 minute display has 0)
- Result (Answered, No Answer, Busy, Fax Machine, etc.)
- Lead (Yes or No)
- Dial Job Name
- Prompt Group
- Phone Line (Number of Line Module)
- Live Transfer (Yes or No)

The Call Details Report can be exported into a Comma Delimited (\*.csv) file format by pressing **Export**.



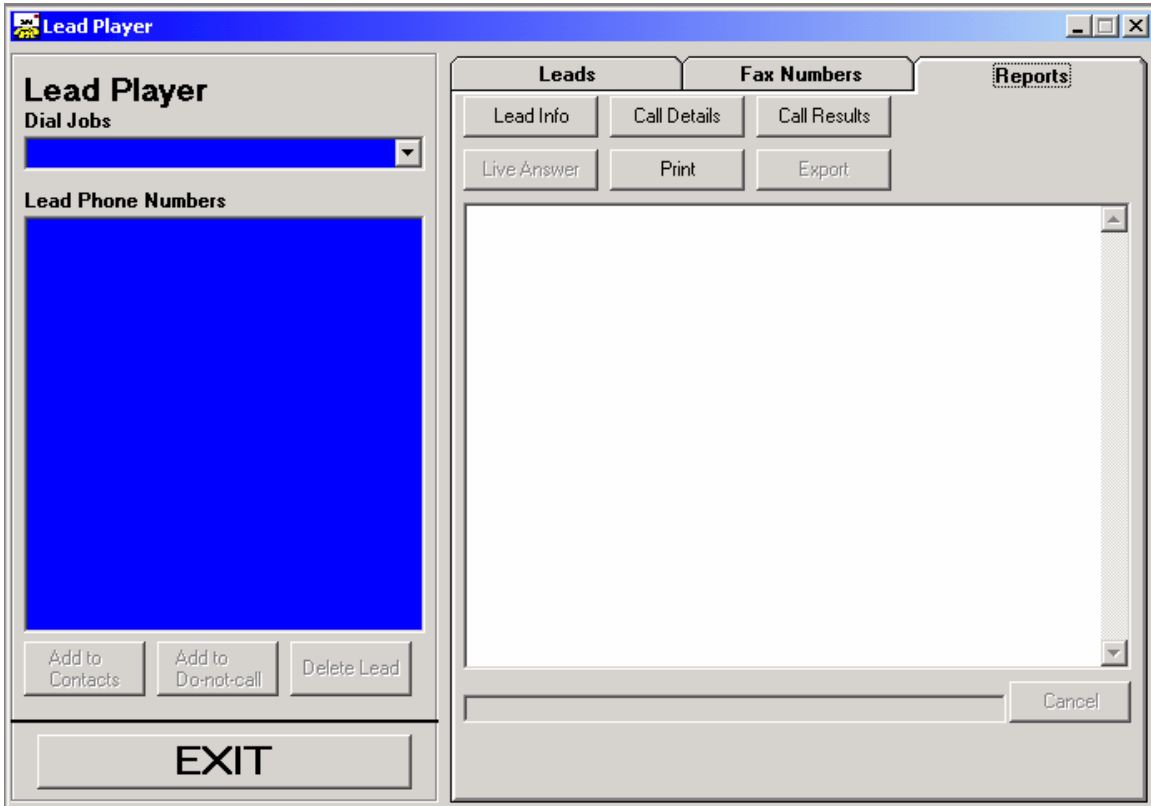
**Caution: Please be aware that for dates containing a heavy call volume the Call Details report may not display immediately; refer to the blue status bar to determine the progress of the report.**

### **Call Results**

The Call Results report displays the results of all Dial Jobs. To run the report, press **Call Results**, when the report is finished loading it will appear in the report window and will display the following results in both count and percentage format:

- No Results
- Error
- Answer
- Answering Machine
- Intercept
- No Ring
- No Answer
- Busy

- CPA Tone
- Answer Fax



## Appendix A: Troubleshooting Guide *Common Solutions*

The *Troubleshooting Guide* contains solutions to common issues users of the Telephony Server encounter. If you find that you are unable to resolve an issue(s) using the *Troubleshooting Guide*, please contact USIC Technical Support (1-800-941-2590) or email [support@usinfotel.com](mailto:support@usinfotel.com)

### Question 1:

I have plugged in the Telephony Server following the directions outlined in the manual however the Telephony Server will not start.

### Answer 1:

Check to make sure that both the connection to the monitor and computer are secure both at the wall and on the computer and monitor end. In addition, check to make sure the monitor is turned ON, signified by a green light.

### Question 2:

When starting the Telephony Server I receive an "Unable to find NTLDR " DOS error?

### Answer 2:

A non-bootable disk is inserted in the floppy drive, remove the drive from the disk and restart the Telephony Server.

### Question 4:

I stopped the Line Module(s) while calling and the calling did not automatically stop?

### Answer 4:

If you stop the Line Module(s) while calling by pressing **Stop**, the Telephony Server will finish the call in progress and then stop.

### Question 5:

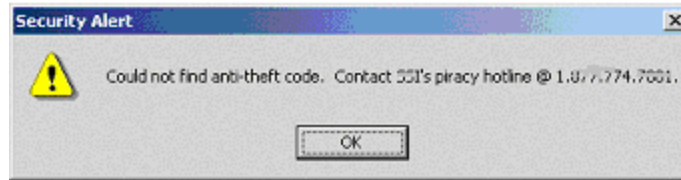
I was unable to call in and check my leads, while the Telephony Server was making outbound calls?

### Answer 5:

The Telephony Server cannot be accessed remotely to check leads while the Telephony Server is making outbound calls. You can only call into check your leads when the Telephony Server is not scheduled to make outbound calls.

## Question 6:

When I open the VBS application I receive the following message:



## Answer 6:

You have removed the security key that was attached to the parallel port of your Telephony Server. Attach the security key back on to the parallel port, if you have lost the security contact USIC Technical Support.

## Question 7:

When printing reports the table prints of the page, what can I do?

## Answer 7:

Change your printer settings to print in Landscape mode instead of the default Portrait mode.

## Question 8:

In the Device Manager there is a red **X** over a device labeled **Unknown PCI Bridge**, should I enable this device?

## Answer 8:

No, you should not enable this device, the **Unknown PCI Bridge** is caused by the use of a PCI based Telephony Card within the Windows 2000 Professional<sup>®</sup> operating system, which utilizes Plug and Play technology.

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