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## Supervisor's User Guide



# Interchange Supervisor's User Guide

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## Supervisor's User Guide Models

This Interchange Supervisor's User Guide is applicable for the following system models.

Product	Required Software Version
Interchange	Software versions 11.1 and later

## Document Revision History

Date	Affected Pages	Change
March 2003	ALL	Original Release
March 2004	ALL	Rebrand (new Comdial logo)
April 2006	ALL	Rebranding only (Vertical)

## SYSTEM OVERVIEW

Once the installing technician sets up the Interchange system at a site, an on site system supervisor must be appointed to perform day-to-day system maintenance tasks. This manual defines the tasks that you, the System Supervisor, may need to perform. It also provides information about how to complete each task.

Before you attempt to perform any system supervisor functions, you must be familiar with the basic capabilities and structure of the Interchange system.

### What Does Interchange Do?

In its simplest form, Interchange acts like a telephone receptionist. It answers incoming calls and transfers them to the appropriate extension. If the called extension is not available (busy or no answer), Interchange offers to take a message or try an alternative extension.

Interchange functionality includes:

- Automated attendant features
- Voice mail features

These two functions work together to provide smooth call coverage at an Interchange site.

*What Does Interchange Do? (continued on next page)*

*What Does Interchange Do? (continued)***WHAT IS AN AUTOMATED ATTENDANT?**

The automated attendant features perform the tasks of a live attendant.

Live Attendant	vs	Interchange Automated Attendant
Answers an incoming call by lifting telephone.		Answers an incoming call by going "off-hook."
Greets the caller with a phrase such as, "Welcome to [XYZ Company]."		Greets the caller by playing a pre-recorded greeting such as, "Welcome to [XYZ Company]."
Asks to whom the caller wishes to speak.		Plays a pre-recorded greeting that prompts the caller to either: dial the extension of the party they are trying to reach, or choose from a list of voiced options.
Listens to the caller's response.		Listens to the digits dialed by the caller.
Says, "Please hold."		Plays a pre-recorded phrase, "Please hold..."
Calls the required extension by hook-flashing and dialing the extension number.		Calls the required extension by hook-flashing and dialing the extension number.
Listens for busy tone, ring tone, answer, etc.		Listens for busy tone, ring tone, answer, etc.
If the extension is busy, offers to let the caller hold. If the extension does not answer, offers to take a message or try another extension.		If the extension is busy, plays a pre-recorded prompt offering the option to hold. If the extension does not answer, plays a pre-recorded prompt offering to take a message or try another extension.

*What Does Interchange Do? (continued on next page)*

*What Does Interchange Do? (continued)*

**WHAT IS VOICE MAIL?**

The term *voice mail* refers to systems that can record a voice message and treat it like a mail message.

In a typical office environment, the live attendant takes a message from a caller and writes it down on a piece of paper. The attendant then places the slip in the recipient's in-box or *mailbox*. The box owner then retrieves and reads the message placed in the box.

In contrast, the Interchange records a message from a caller and places it in a voice mailbox. The mailbox owner can later retrieve the message by calling into the system and listening to the recording. The following table compares how Interchange processes voice messages compared to a live attendant.

Live Attendant	vs	Interchange Voice Mail
Attendant listens as the callers dictates their messages, writing it down on a piece of paper.		Interchange records the message as the caller speaks.
Attendant places the message slip in a mailbox belonging to the recipient.		Interchange stores the voice message electronically in the recipient's voice mailbox.
Attendant dials the code to turn on message waiting lamp on the recipient's telephone.		Interchange dials the code to turn on the message waiting lamp on the recipient's telephone.
Recipient sees the message waiting lamp is on, and retrieves message slips from the message mailbox.		Recipient sees the message waiting lamp is on and dials Interchange to retrieve messages.
Recipient reads messages left on message slips.		Interchange plays messages recorded by callers in the voice mailbox.

*What is Voice Mail? (continued on next page)*

*What is Voice Mail? (continued)*

Interchange is designed using the Box concept. A box contains a set of instructions that tells the program what to do with a call it is handling. By sending calls to different boxes created on the system, the system effectively processes calls—including playing certain prompts or greetings to callers, collecting information and messages from callers, and routing calls to certain extensions based on digits dialed by callers.

When you use the automated attendant capabilities in Interchange, the system uses routing boxes to answer incoming calls, play a listing of options to callers, and route each call to a specific mailbox (or another type of box on the system) based on either digits dialed by the caller, or on other criteria the technician defined when the system was set up.

The mailboxes transfer calls to their associated extensions and store messages for system mailbox owners. Each mailbox can also be set up to forward calls to another phone or extension number, deliver messages to another phone or pager, play one of 10 pre-recorded greetings to callers, screen calls, queue calls when the extension is busy, or record call conversations.

In addition to routing boxes and mailboxes, the Interchange provides several other types of boxes:

- Question box
- Directory box
- Account Number box
- Group box
- Customer Service box.

This document discusses how you can make modifications to mailboxes and routing boxes, which are the two most commonly used box types.

Because the other types of boxes are used in conjunction with more intricate system setups, adjusting their functionality is best left to a certified Interchange technician. Therefore, if you need to adjust the operation of any boxes other than mailboxes or routing boxes, contact your Interchange technician.

## **Understanding Supervisor Responsibilities**

You can perform most administrative functions over the telephone, by simply calling into the system and logging into a supervisor mailbox. Other functions, however, must be performed from the Interchange PC because they require you to make adjustments to fields on Interchange program screens.

### **CREATING, MODIFYING, AND DELETING MAILBOX OWNER MAILBOXES**

All employees are assigned a mailbox in the system. They can use Interchange to record voice mail messages in a mailbox, or to forward calls to other phones or extension numbers. As employees join and leave the company, you must create or delete their associated mailboxes.

If employees' need to access certain system features changes, you may need to modify their mailboxes. You must also modify mailboxes when employees want to change numbers the system uses with its message delivery and pager notification features.

While you can perform most modifications by calling into the system over the telephone, certain modifications require you to use the Interchange PC (such as modifying the second through fifth phone or pager numbers for message delivery).

### **CREATING AND MAINTAINING GROUP DISTRIBUTION LISTS**

Group distribution lists provide mailbox owners an easy way to send one message they record to multiple individuals, without specifying each individual recipient's extension.

Though mailbox owners can set up one to four personal distribution lists specific to their needs, many organizations also set up group distribution lists that can be used by all company employees.

A group list a company maintains may contain, for example, the names of all company employees, of all employees in a particular department, of all employees that work a specified shift, etc. You must update these group distribution lists as employees join or leave your organization.

You must create and maintain group distribution lists using the Interchange PC (you cannot call into the system over the telephone to create/modify them).

*Understanding Supervisor Responsibilities (continued on next page)*

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***Understanding Supervisor Responsibilities (continued)*****ISSUING BROADCAST MESSAGES**

The broadcast message feature allows you to easily distribute informational messages to all mailboxes on the system. Only a system supervisor has access to this feature.

You must issue broadcast messages by calling into the system over the telephone.

**DISABLING PORTS AND RE-ENABLING PORTS**

Should a telephone line or port be malfunctioning, the Interchange system technician may ask you to disable the line until it can be serviced.

You can only disable ports by calling into the system over the telephone.

**TEMPORARILY FORCING THE SYSTEM INTO DAY, LUNCH, OR NIGHT SERVICE MODE**

Interchange can be set up to play different greetings and to process calls differently according to the time of day each call is received. Three different modes can be set up on the system: Day Service, Lunch Service, and Night Service.

Each service mode is assigned a specific time segment of the day. Calls received within a mode's time segment are routed to a particular box, which plays a particular greeting. Many systems, for instance, have calls route to a different box that plays an Office Closed greeting during the Night Service hours.

Occasionally, you may need to force Interchange to temporarily process calls according to a service mode that is other than the current mode (to extend the Lunch hour mode for example).

You can only temporarily change the service mode by calling into the system over the telephone.

*Understanding Supervisor Responsibilities (continued on next page)*

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*Understanding Supervisor Responsibilities (continued)***CHANGING DESIGNATED COMPANY BUSINESS HOURS**

You may need to permanently change the hours associated with the Day Service, Lunch Service, and Night Service modes. If, for example, your company extends its business hours from 5:00 PM to 6:00 PM during a particular time of the year, you may need to extend the Day Service hours (during which the system routes calls to a box that plays an Office Open greeting) to last until 6:00 PM.

To permanently adjust the business hours you must use the Interchange PC to access the Business Hours screen.

**CHANGING DESIGNATED COMPANY HOLIDAYS**

Up to 20 holiday dates can be defined on the system. On each holiday, calls can be routed to a special Routing box, in which you can record a specific holiday greeting. From time to time, especially from year to year, you may need to add, modify, or delete specified holiday dates.

You must use the Interchange PC to modify the holiday dates. (You can record holiday greetings over the telephone, however.)

**CHANGING THE GREETING PLAYED BY A ROUTING BOX**

When a call comes into Interchange, it is processed by a routing box, which plays a greeting to the caller and may offer the caller options on how the call can proceed (*"Press 2 for Sales,"* for example). You may need to modify the greeting played by a particular routing box. For example, you may want to customize the greeting played by the routing box that answers calls on a particular holiday. Or, you may need to add or eliminate a routing option voiced to callers (such as, *"Press 5 for Customer Service"*).

You may use either the Interchange PC to modify the holiday dates or you can call in over the telephone.

*Understanding Supervisor Responsibilities (continued on next page)*

*Understanding Supervisor Responsibilities (continued)***CHANGING THE ROUTING IN A ROUTING BOX**

At times you may need to add or eliminate a routing option available to callers (such as, "Press 5 for Customer Service"). Or, you may need to modify the box to which the call is routed when callers select the option (you may want to send the call to mailbox 399 instead of 395, for example). Remember that when you change single-digit key routing, you must also change the greeting voiced by the routing box (as described in *Changing the Greeting Played by a Routing Box (continued)*).

You may use either the Interchange PC to modify single-digit call routing or you can call in over the telephone. However, you can only modify the routing technique (routing based on day of week, call sequence, etc.), through the screen interface.

**CONTROLLING MAILBOX OWNER ACCESS  
TO SYSTEM FEATURES**

You can modify the features to which a group of mailbox owners is permitted access by modifying the class of service assigned to the mailbox owners. Making class of service modifications allows you to also prevent the system from dialing certain phone numbers, such as long distance numbers, when making outgoing calls from a mailbox owner's mailbox.

Outgoing calls may be made by the system to deliver messages to a mailbox owner, page a mailbox owner, or to have the system place an outgoing call (when the mailbox owner calls into the mailbox and selects this option).

You must use the Interchange PC to adjust the Class of Service screen.

## SUPERVISOR FUNCTIONS BY PHONE

To access system supervisor functions by calling into the system, you must log into a supervisor mailbox. A supervisor mailbox is any mailbox that has been assigned supervisor privileges in the mailbox's assigned class of service. The mailbox's assigned class of service defines the features and options to which the mailbox owner is permitted access.

Consult with the technician who installed the Interchange system for a list of which mailboxes have been assigned supervisor privileges.

### Accessing the Supervisor Menu

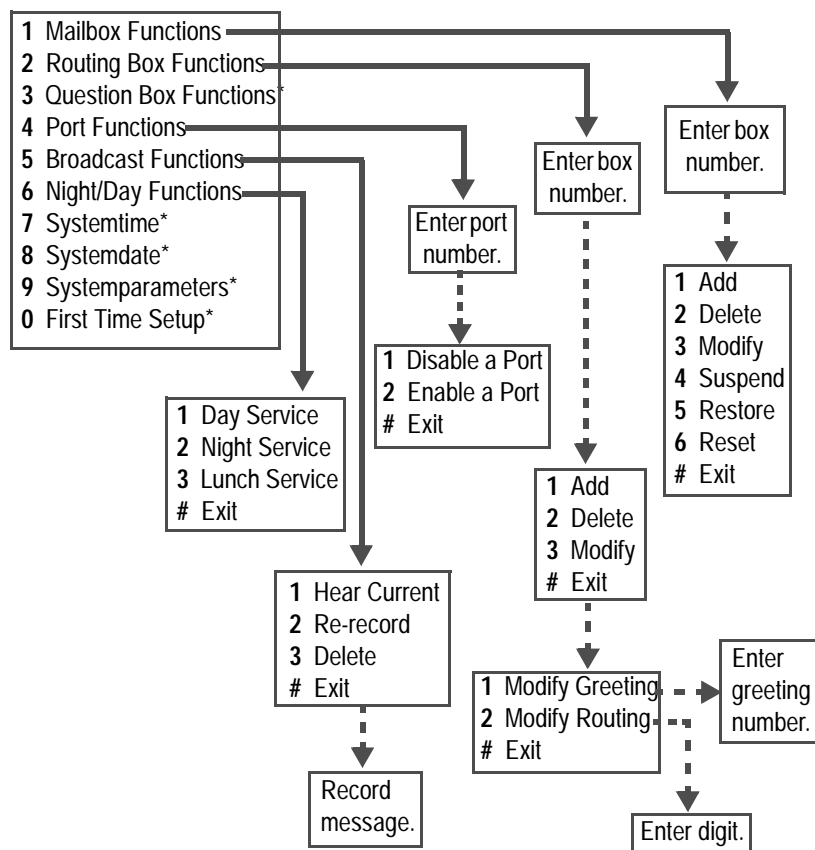
To log into a supervisor mailbox from the telephone, and access supervisor functions, perform the following steps.

- 1) Call into voice mail and log into a supervisor mailbox.
  - *The system voices the Main Menu: "To listen to your messages press 1. To send a message press 2. To change your options press 3."*
- 2) Press 6 to hear the Supervisor menu options:
  - *The system does not voice this option*

SUPERVISOR MENU	
For Mailbox Administration	Press 1
For Routing box Administration	Press 2
For Question box Administration	Press 3
For Port Administration	Press 4
To Change the System Broadcast Message	Press 5
To Change the voice mail Day / Night Service	Press 6
To Change the System Time	Press 7
To Change the System Date	Press 8
To Modify System Parameters	Press 9
To Perform First Time Setup	Press 0
To Exit	Press #

## Quick Reference Voice Mail Menu Map

The following illustration shows the structure of the Supervisor menus.



**CAUTION**

Select and modify these options *ONLY* under the guidance of your system technician. Using these options incorrectly may keep the system from effectively processing calls and performing messaging functions. This guide does not include information on working with these options.

## Creating, Changing, or Deleting a Mailbox

You can create, modify, or delete a mailbox using options on the Mailbox Administration menu. Specifically, you can use this menu to:

- add or delete a mailbox
- change a mailbox greeting (the mailbox owner can also perform this function by logging into the mailbox),
- change a mailbox password (the mailbox owner can also perform this function by logging into the mailbox)
- change the call transfer, pager, and message notification numbers (the mailbox owner can also perform this function by logging into the mailbox)
- suspend a mailbox (making it inaccessible to the mailbox owner) and restore access to a suspended mailbox

### From the Supervisors menu:

- 1) Press *1* for Mailbox Administration.

***When prompted:***

- 2) Enter the number of the mailbox you want to add, modify, or delete.
  - *The system repeats the number back to you.*

***When prompted:***

- 3) Press *1* to confirm the number or press *#* if the number you entered was incorrect.

Once you confirm (i.e., press *1*), the system gives you the Mailbox menu options that allow you to:

- **Add** a mailbox: press **1**. (*Also see page 12*)
- **Delete** a mailbox: press **2**. (*Also see page 12*)
- **Modify** a mailbox: press **3**. (*Also see page 12*)
- **Suspend** a mailbox: press **4**.
- **Restore** a mailbox: press **5**.
- **Reset** a mailbox: press **6**.
- **Exit** a mailbox: press **#**.

*Create, Modify, or Delete a Mailbox by Telephone (continued on next page)*

*Create, Modify, or Delete a Mailbox by Telephone (continued)*

### **CREATING A NEW MAILBOX (PRESS 1)**

- All default settings in the mailbox are set to the default parameters settings specified in prototype mailbox 9994.
- The default password for the mailbox is the same as the mailbox number.

### **DELETING A MAILBOX (PRESS 2)**

The system immediately deletes the mailbox from the mailbox database when this option is selected.

### **MODIFYING A MAILBOX (PRESS 3)**

The system offers the following options when modifying a mailbox:

- **Record your name:** press 1. *(Also see page 13)*
- **Record a greeting:** press 2. *(Also see page 14)*
- **Change your password:** press 3. *(Also see page 14)*
- **Change your transfer setup:** press 4. *(Also see page 15)*
- **Change your message notification** setup: press 5. *(Also see page 16)*
- **Change your pager** setup: press 6. *(Also see page 16)*
- **Review messages scheduled for future delivery:** press 7. *(Also see page 17)*
- **Change your personal distribution lists:**press 8.
- **Retrieve a message** previously sent: press \*.
- **Return to the Main Menu:** press #.

*Modifying a Mailbox (continued on next page)*

*Modifying a Mailbox (continued)*

**Recording Your Name**

If you press *1* from the Options menu to record a name in the mailbox, the system plays the current recording of the name and prompts you to:

- **Replay your name:** press **1**.
  - If you press *1*, the system plays the current recording of the name, then plays the menu again.
- **Re-record your name:** press **2**.
  - If you press *2*, the system asks you to record your name after the tone. Say the name, then press **#** to end the recording.  
  
If you do not press **#**, the system will record a few seconds of silence before ending the recording. This will slow the progression of calls to the mailbox. Once the name has been recorded, the system plays the above menu again.
- **Delete your name:** press **3**.
  - If you press *3*, the system deletes the current recording of the name.
- **Exit:** press **#**.
  - If you press **#**, the system returns you to the Options menu.

*Modifying a Mailbox (continued on next page)*

*Modifying a Mailbox (continued)*

**Recording a Greeting**

You can record up to ten personal greetings for the mailbox (numbered 0 through 9).



**NOTE**

*This is NOT a "Supervisor Only" task (i.e., each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor).*

- 1) Press 2 to access the Greeting option and hear a list of options.

**When prompted:**

- 2) Select one of the following options to:
  - **Replay** the greeting: press 1.
  - **Re-record** the greeting: press 2.
  - **Delete** the greeting: press 3.
  - **Choose a New** greeting: press 5.
  - **Exit**: press #.

**Changing Your Password**

- 1) Press 3 to access the Change Password option and hear a prompt that asks you to enter the current password.



**NOTE**

*This is NOT a "Supervisor Only" task (i.e., each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor).*

*Changing Your Password (continued on next page)*

*Changing Your Password (continued)*

**When prompted:**

- 2) Enter the current password to hear a prompt to change the password.
  - *By default, the mailbox password is the same as the mailbox number.*
- 3) Enter the new mailbox password.
  - *You will be prompted to enter the new password again as confirmation (to make sure you have entered it the way you want it).*
- 4) Enter the new password a second time to confirm.
  - *The system will let you know that the new password will be in effect the next time the mailbox is accessed.*

**Changing Your Call Transfer Setup**

- 1) Press 4 to access the Call Transfer option and hear the current setup, then a list of options.



**NOTE**

*This is NOT a “Supervisor Only” task (i.e., each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor).*

**When prompted:**

- 2) Select one of the following options to:
  - **Change** the number: press 1.
  - **Turn the feature on/off:** press \*.
  - **Exit:** press #.

*Modifying a Mailbox (continued on next page)*

*Modifying a Mailbox (continued)*

**Changing Your Message Notification Setup**

- 1) Press 5 to access the Message Notification feature and hear the current setup, then a list of options.



**NOTE**

*This is NOT a "Supervisor Only" task (i.e., each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor).*

**When prompted:**

- 2) Select one of the following options to:
  - **Change** the number: press **1**.
  - **Turn the feature on/off**: press **\***.
  - **Exit**: press **#**.

**Changing Your Pager Setup**

- 1) Press 6 to access the Pager feature and hear the current setup, then a list of options.



**NOTE**

*This is NOT a "Supervisor Only" task (i.e., each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor).*

**When prompted:**

- 2) Select one of the following options to:
  - **Change** the number: press **1**.
  - **Turn the feature on/off**: press **\***.
  - **Exit**: press **#**.

*Modifying a Mailbox (continued on next page)*

*Modifying a Mailbox (continued)*

**Reviewing Messages Scheduled for Future Delivery**

- 1) Press 7 to hear any messages identified as scheduled for future delivery, then a list of options.



**NOTE**

*This is NOT a "Supervisor Only" task (i.e., each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor).*

**When prompted:**

- 2) Select one of the following options to:
  - **listen to** the message: press **1**.
  - **Hear the next** (scheduled) message: press **2**.
  - **Cancel** the message: press **4**.
  - **Exit**: Press #.

## Creating a Broadcast Message

- A broadcast message is heard by all mailbox owners when they open their mailboxes.
- The broadcast message can only be recorded by a mailbox owner with supervisor privileges.
- This type of message is different from any other message in the system in the following ways:
  - The broadcast message does not activate any mailbox notification services (message waiting lamps, pagers, etc.).
  - The mailbox owner's new and old message counts are not affected by a broadcast message.
  - The broadcast message is sent to all mailboxes. It is not possible to select which mailboxes are to receive the broadcast message.
- Once you record a broadcast message, the system plays it to all mailbox owners the next time they open their mailboxes.
- The system plays a broadcast message only one time to mailbox owners (i.e., it is not repeated when they log in the next time).



**NOTE:**

- *If you record a broadcast message, each new mailbox that you later create will receive that broadcast message.*
- *To prevent newly created mailboxes from receiving a currently recorded broadcast message, you must first delete the broadcast message before creating the new mailboxes.*

*Creating a Broadcast Message (continued on next page)*

*Creating a Broadcast Message (continued)*

## SENDING A BROADCAST MESSAGE

From the Supervisors menu (*see page 9*).

- 1) Press 5 for System Broadcast Message to hear the following options that allow you to:
  - **Listen** to the current broadcast message: press **1**.
  - **Re-record** the broadcast message: press **2**.
  - **Delete** the broadcast message: press **3**.
  - **Exit**: press **#**.

## Recording a Broadcast Message

- 1) Press 2 to access the Broadcast Message feature and hear a series of prompts.
- 2) Follow the prompts to complete the procedure.

## Disabling or Re-Enabling a Port

- If you want to prevent the system from answering calls on one or more of its ports (usually because the port is not functioning properly), you can disable the port(s) over the telephone.



### **CAUTION**

*If you disable a port, all calls using that port will be immediately terminated*

- If you want to later re-enable a port that you previously disabled, you can also perform this function by calling into the system.

From the Supervisors menu (*see page 9*).

- 1) Press 4 to access Port Administration.

**When prompted:**

- 2) Enter the number of the line with which you want to work.

*Disabling or Re-Enabling a Port (continued on next page)*

***Disabling or Re-Enabling a Port (continued)***

**When prompted:**

- 3) Press **1** to confirm the number you entered and hear a list of options (go to step 4).

***OR***

Press **#** if the number you entered was incorrect (then repeat steps 2 and 3).

- 4) Select one of the following options to:
  - **Disable** a port: press **1**.
  - **Enable** a port: press **2**.
  - **Exit**: press **#**.

## Temporarily Forcing the System into Day, Lunch, or Night Service Mode

You can override the regular Day Service, Lunch Service, or Night Service mode by forcing the system into another mode. The system switches to the new service mode and remains in that mode until the next scheduled mode change.



### **EXAMPLE**

*Assume that Day Service mode runs from 8:00 AM until 5:00 PM, and Lunch Service mode runs from noon until 1:00 PM.*

*If you call in at 9:00 AM (the system is in Day Service mode) and force the system into Night Service mode, the system remains in Night Service mode until noon.*

*It then automatically switches to Lunch Service mode.*

## FORCING INTERCHANGE INTO DAY SERVICE, LUNCH SERVICE, OR NIGHT SERVICE MODE

**From the Supervisors menu (see page 9).**

- 1) Press 6 to access the for Day / Night service feature and hear a list of options.
- 2) Select one of the following options that allow you to:
  - **Change to Day Service Mode** (temporarily): press **1**.
  - **Change to Night Service Mode** (temporarily): press **2**.
  - **Change to Lunch Service Mode** (temporarily): press **3**.
  - **Exit**: press **#**.
- 3) Follow the prompts to complete the procedure.

### **Using Routing Box Greetings**

By default, Interchange is pre-configured with 3 routing boxes to process calls. Routing box 800 answers calls during office open business hours (Day Service), box 801 answers calls after Day Service hours, and box 821 routes calls after they have already passed through box 800 or 801.

The Interchange technician who set up the system can familiarize you with modifications that were made to this routing box structure, including additional routing boxes that were created.

Up to 10 different greetings can be recorded and stored in each routing box. The following chart is provided for you to note routing box greetings set up on your system.

<b>ROUTING BOX GREETING CHART</b>		
<b>Box</b>	<b>Greeting Number</b>	<b>Greeting</b>

*Using Routing Box Greetings (continued on next page)*

*Using Routing Box Greetings (continued)*

**ADDING, CHANGING, OR DELETING  
ROUTING BOX GREETINGS**

**From the Supervisors menu (see page 9).**

- 1) Press 2 to access Routing Box Administration.

**When prompted:**

- 2) Enter the number of the routing box you want to add, modify, or delete.
  - *The system repeats the number back to you.*

**When prompted:**

- 3) Press 1 to confirm the number you entered and hear a list of options (go to step 4).

**OR**

Press # if the number you entered was incorrect (then repeat steps 2 and 3).

- 4) Select one of the following options to:
  - **Add** the greeting: press 1.
  - **Delete** the greeting: press 2.
  - **Modify** the greeting: press 3.
  - **Exit**: press #.

**Recording a Routing Box Greeting**

**Follow steps 1 to 3 above.**

- 5) Press 3 to select the Modify option.
- 6) Press 2 to select the Record a Greeting option.

**When prompted:**

- 7) Enter the number of the routing box whose greeting you want to record.

*Recording a Routing Box Greeting (continued on next page)*

***Recording a Routing Box Greeting (continued on next page)***

**When prompted:**

- 8) Press **1** to confirm the number you entered and hear a list of options (go to step 9).

***OR***

Press **#** if the number you entered was incorrect (then repeat steps 7 and 8).

- 9) Select one of the following options to:
- **Replay** the greeting: press **1**.
  - **Re-record** the greeting: press **2**.
  - **Delete** the greeting: press **3**.
  - **Choose** a new greeting: press **5**.
  - **Exit**: press **#**.

**Re-Recording a Routing Box Greeting**

**Follow steps 1 to 3 on page 23.**

- 4) Press **3** to select the Modify option.  
5) Press **2** to select the Record a Greeting option.

**When prompted:**

- 6) Enter the number of the routing box whose greeting you want to re-record.

*Re-recording a Routing Box Greeting (continued on next page)*

**Re-recording a Routing Box Greeting (continued)**

- 7) Press 1 to replay the existing greeting.



**HINT**

*By replaying the greeting, you can:*

- *Be sure you are re-recording the greeting you intended to modify, and*
- *Be aware of all the call routing options that are currently provided in the greeting, so you can make sure the same routing options are available in the new greeting (e.g., "...Press 2 for Sales...").*

*If you need to change the call routing options (single-digit), see [Changing the Single-Digit Call Routing in a Routing Box \(continued\)](#).*

- 8) Press 2 to hear a prompts asking you to enter the number of the greeting you want to re-record.
- 9) Enter the greeting number (0 through 9).
- 10) Follow the prompts to complete the procedure.

*Adding, Changing, or Deleting Routing Box Greetings (continued on next page)*

***Adding, Changing, or Deleting Routing Box Greetings (continued)***

**Choosing a New Greeting**

You can easily choose a new greeting to play as the currently active greeting.

**Follow steps 1 to 3 on page 23.**

- 4) Press 3 to select the Modify option.
- 5) Press 5 to hear a prompt asking you to enter the number of the greeting you would like to activate.

***OR***

Press \* to hear the currently active greeting, and a list of options:

- **Replay** the greeting: press **1**.
- **Re-record** the greeting: press **2**.
- **Delete** the greeting: press **3**.
- **Choose** the new greeting: press **5**.
- **Exit**: press #.



***NOTE***

*Once you press 5 and enter a new greeting number, the system confirms the greeting number and plays the now-active greeting.*

## Changing the Single-Digit Call Routing in a Routing Box

- Interchange can be set up to play greetings to callers that include single-digit call routing options, such as, "Press 2 for Sales..." .
- In this setup, a call is transferred to a specific mailbox when the caller presses 2 during or after the greeting.
- You can control the digits callers can dial, and the path their calls subsequently take using the following procedure.



### **NOTE**

*If you change the single-digit call routing set up, you must also update the routing box greeting to relay new instructions to the caller. See Using Routing Box Greetings (continued) to update the greeting as necessary.*

### **From the Supervisors menu (see page 9).**

- 1) Press 2 to access Routing Box Administration.

#### **When prompted:**

- 2) Enter the number of the routing box you want to add, modify, or delete.
  - *The system repeats the number back to you.*

#### **When prompted:**

- 3) Press 1 to confirm the number you entered and hear a list of options (go to step 9).

### **OR**

Press # if the number you entered was incorrect (then repeat steps 7 and 8).

*Changing the Single-Digit Call Routing (continued on next page)*

***Changing the Single-Digit Call Routing (continued on next page)***

- 4) Select one of the following options to:
  - **Add:** press 1.
  - **Delete:** press 2.
  - **Modify:** press 3.
  - **Exit:** press #.
- 5) Press 3 to hear another list of options.
  - **Change** the greeting: press 1.
  - **Change** the routing: press 2.
  - **Exit:** press #.

**CHANGING THE ROUTING STRUCTURE**

- 1) Press 2 to access the Routing Structure feature and hear a prompt asking you to press the appropriate button.

**When prompted:**
- 2) Press the digit that represents the routing setup that you want to change.
  - *The system identifies the current call routing set up for the digit.*
  - *Also see "Special Routing Options" on page 29*

**When prompted:**
- 3) Press 1 to access the Change Routing option.

**When prompted:**
- 4) Enter the number of the box to which you want callers to be routed.

*Changing the Routing Structure (continued on next page)*

*Changing the Routing Structure (continued)*

**Special Routing Options**

You can make special call routing refinements by pressing \* in step 2 (on page 28). These special options allow you to:

- **Change the destination for the star digit:** press \*.
- **Change the destination for the pound digit:** press #.
- **Change the No Digits Destination:** press 1.
- **Change the Invalid Digit Destination:** press 2.
- **Change the Voice Detected Destination:** press 3.



**CAUTION**

- *Once you access this menu, DO NOT press # to exit it, since the # key invokes a change to the destination for the pound key.*
- *If you want to return to the previous menu, simply make no entry when you hear the special routing options prompt.*

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## SUPERVISOR FUNCTIONS VIA PC

To access program screens on which you can perform supervisor functions, you must log onto the Interchange PC using the Administrator password. The technician who installed the system can provide this password to you.



### **CAUTION**

- *It is critical that you do not modify any field on any screen or any file on the system unless you are directed to by this guide or by the Interchange System Technician.*
- *Incorrect modifications you make may impair the system's ability to perform call processing and messaging functions.*

## Accessing Interchange via Your PC

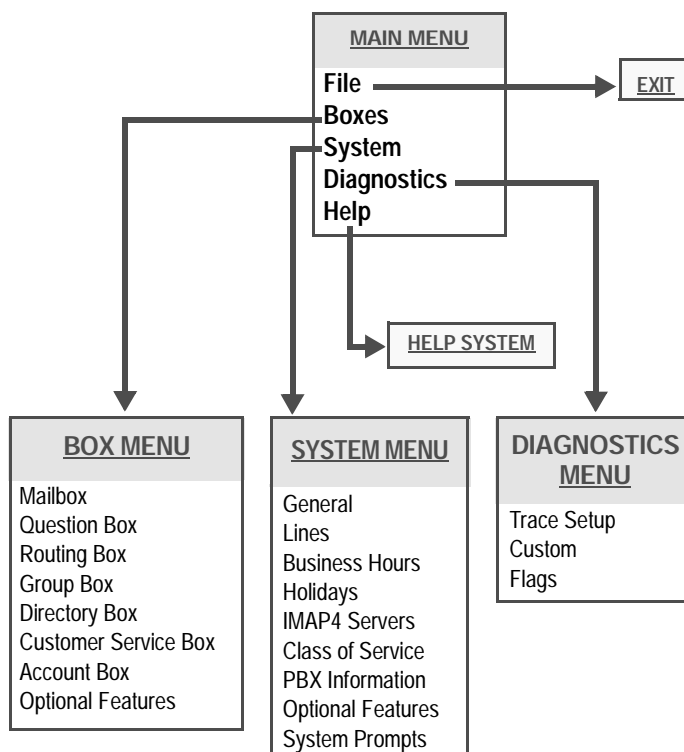
### **From the Windows desktop:**

- 1) Double-click the Database Administrator icon to display the password screen.
- 2) Enter the Administrator password (as mentioned above).
- 3) Press *Enter* to log on to the system and display the main screen.

## Interchange System Menu Structure

**NOTE**

Depending on the type of system installed and the password you entered to log on, you may or may not have access to all menus and options.



## Working with Mailboxes

### ACCESSING THE MAILBOX SCREEN

From the main menu of the main screen:

Go to *Boxes* ► *Mailbox* to display the Mailbox screen.

- The screen opens to show the General tab options.

The screenshot shows the 'Mail box' configuration window. At the top, there are navigation buttons: Prev, Next, New, Delete, Select, Cancel, Save, and Record greeting. Below these are input fields for 'Box number' (10) and 'Name' (Sample Mail box). A tabbed interface is visible with 'General' selected, and other tabs include Call transfer, Recording, Message delivery, Pager, Distribution lists, Hotel, Enhanced, and e-Mail. The 'General' tab contains a 'Password' field (10), a 'Class of service' dropdown (0), and a 'Review Class of service' button. There are also 'Use language' and 'Message Playback' options (First in, first out (FIFO) and Last in, first out (LIFO)). Checkboxes for 'Uses Client desktop applications', 'Restricted access', and 'Mailbox Suspended' are present. Radio buttons for 'Non-UM', 'Dual Message Store', and 'Single Message Store' are also shown. At the bottom, there are fields for 'Sequence to turn on message-waiting lamp' and 'Sequence to turn off message-waiting lamp', both set to 'serial'. There are also checkboxes for 'Use lamp for voice messages' and 'Use lamp for email messages', and input fields for 'New messages' and 'Old messages', both set to 0.

From here you can make settings for:

- General operations (see page 34)
- Call Transfers (see page 44)
- Follow Me (see page 51)
- Recordings (see page 44)
- Message Delivery
- Pages
- Distribution Lists
- Hotel
- Enhanced features
- e-Mail

*Working with Mailboxes (continued on next screen)*

*Working with Mailboxes? (continued)*

## MAKING GENERAL MAILBOX SETTINGS

### What's on the Mailbox General Tab (General Tab)

The following is a listing of descriptions for each field, option, and button on the General tab of the Mailbox screen (*see screen shown on page 33*).

#### **Box Number**

Shows the mailbox which setups you are currently viewing. Every box has its own unique box number, which can range from 1 to 9899.



#### **NOTE**

*You cannot edit this field. To view a different mailbox, press **Prev** (previous mailbox), or **Next** (next mailbox). If you want to add a new mailbox, press **New** (add).*

The box number is the number an outside caller dials to reach the mailbox owner. The system looks inside the mailbox specified for the owner's extension number and transfers the call to that number.

The mailbox number can be the same as its owner's extension number, or it can be different. For example, an arbitrary range of mailbox numbers 5100 through 5109 can transfer.



#### **HINT**

*For setup and system maintenance ease, create mailboxes with numbers that match the extensions to which they transfer calls.*

*What's on the Mailbox General Tab? (continued on next page)*

---

*What's on the Mailbox General Tab? (continued)***Name (first)**

This field contains the first name of the individual to which the mailbox is assigned. Interchange uses this name for record-keeping, and it appears on the database listing.

Prior to initiating a transfer, in standard operation the system plays the system prompt *"Please hold while I transfer your call to [name],"* inserting the called party's name.

**HINT**

- *If you insert the @ symbol before the name in this field (@Mary), the recorded name is substituted with the system prompt "that extension."*
- *If you insert the & symbol before the first name (&Mary), the system does not play either the name or "that extension."*

**Name (last)**

This field contains the last name of the individual to which the mailbox is assigned. Interchange uses the last name in conjunction with the Directory box feature. It also appears on the database listing.

The mailbox is not included in the system directory the system provides to callers if you inset the @ symbol before the first letter of the last name (@Jones) - see HINT on previous page.

Interchange also does not include the mailbox in the system directory if the name prompt has not been recorded for the mailbox.

**Password**

When mailbox owners try to open their mailboxes to retrieve messages, the system asks for a password. Enter this password. It can be up to 10 digits long, and can consist of the digits 0 through 9 and the character \*.

*Password (continued on next page)*

**Password (continued)**

For security reasons, it is recommended that box owners use passwords at least 4 characters long, and that they change them regularly.

If you set the password to 0000 (four zeros), the system allows access to the mailbox without asking for a password.

**CAUTION**

- Use this feature with caution, as it can allow unauthorized access to a mailbox.
- If you enclose the password in brackets [ ], it cannot be changed remotely over the telephone.

**Record Name**

This button indicates whether mailbox owners have recorded their own names. The system indicates an existing recording by a displaying a red light on the button.

- The system uses the mailbox owner's name in the following instances.
  - When the system initiates a transfer:  
"Please hold while I transfer your call to [name]."
  - When the called party is busy:  
"[Name] is busy. You are number [number] in line."
  - When the called party does not answer and there is no personal greeting recorded:  
"[Name] is not available right now. If you would like to leave a message press 1."
  - When the system calls owners to deliver their new messages (message notification):  
"Message for [name]. Press 1 if you would like to hear your messages."
  - When another mailbox owner uses the send message feature to send a message to this box. The system plays the name for this box and asks for confirmation:  
"[Name]—if this is correct, press 1."

*Record Name (continued on next page)*

*Record Name (continued)*

- When callers use the directory feature. The system plays each name that matches the letters entered by the caller.  
*"[Name]—if this is the person you want, press 1."*
- When mailbox owners open their mailboxes.  
*"[Name]—You have [number] new messages."*



**NOTE**

*If there is no name recorded for the mailbox, the system does not include the mailbox in the system directory and uses "that extension" instead of the name in various phrases.*

- You can record the name by clicking on the *Record Name* button, then using the controls on the Sound Recorder dialog box.
- At the lower right of the dialog, click on the red circle button to begin recording. Click on the rectangle button (to the left of the circle button) to end the recording.

*What's on the Mailbox General Tab? (continued on next page)*

*What's on the Mailbox General Tab? (continued)***Class of Service**

This field allows you to assign a class of service to the current mailbox. A class of service is a set of privileges that are assigned to the mailbox owner. There are 32 classes of service available, numbered 0 through 31. For more information, see *Review of Class Service* below.

**Review Class of Service**

Use this button to view and modify the available classes of service (see *Class of Service* above for more information)

**EXAMPLE**

*Let's say you use class of service 7 for supervisor privileges. You would assign this class of service only to mailboxes whose owners are to be provided access to the supervisor menu functions.*

*Then, you assign class of service 1 to mailboxes that are issued to temporary employees. As such, you could set up class of service to provide its mailboxes with access to only one personal greeting and no other additional privileges.*

*Suppose you assign class of service 3 to most "average" employees. You could set up this class of service to provide its mailboxes access to a certain set of features, such as call queuing and P.A. call announce capabilities.*

*You could also assign class of service 4 to company executives. This class of service could provide all the features allowed for the "average" employee, plus additional features pertaining to immediate access and high amounts of travel, such as Find Me Follow Me.*

*What's on the Mailbox General Tab? (continued on next page)*

*What's on the Mailbox General Tab? (continued)***Use Language**

This field indicates the language that callers hear when a call is routed to this mailbox via direct in dial. This entry is required, since the direct-in-dial digits are received before the system is able to ask callers which language they want to use.

**NOTE**

*Consult your Interchange System Technician for information on completing this field.*

**Message Playback**

Use one of these options to specify the order in which messages are played to the mailbox owner. The options available include the following.

Option	Order of Playback
<b>First In First Out (FIFO)</b>	Any urgent messages are played first (oldest first), then any non-urgent messages are played (oldest first).
<b>Last In First Out (LIFO)</b>	Any urgent messages are played first (newest first), then any non-urgent messages are played (newest first).

**Mailbox Suspended**

This field tells you whether this mailbox is currently in a lock-out state. Interchange suspends a mailbox when a caller has tried to log in three times unsuccessfully because of a password failure. This is a safeguard to prevent unauthorized access to a mailbox.

The suspension can last from 0 to 7 days (the default is 30 minutes). If mailbox owners are reporting they are locked out of their mailboxes, you can check if the system has suspended the mailbox by looking at this field.

If the mailbox is currently suspended, the system displays a checkmark here. You can reinstate the mailbox by removing the checkbox.

*What's on the Mailbox General Tab? (continued on next page)*

*What's on the Mailbox General Tab? (continued)*

**Uses Client Desktop Applications**

This field indicates whether the mailbox owner is permitted to use the VCM feature, the Mailbox Administration/Call Control feature, and/or the Unified Messaging feature.



**NOTE**

- *These client desktop applications are available as optional add-on features to Interchange. Access to these features is sold on a per-dedicated-seat license.*
- ***Do not exceed*** the licensing by activating these features for more boxes than are licensed.  
*Interchange will monitor system usage to ensure licensing requirements for each desktop application are not exceeded. If they are, the system will de-activate feature access to mailboxes exceeding licensing limits.*

Though you can check the *Uses Client desktop applications* field on as many user mailbox setup screens as you like, the system will not permit access to the feature by more users than the number of licenses purchased with the system.

If, for example, a 5-seat unified messaging license was purchased with the system, only 5 users can have the unified messaging feature running with their desktop Inbox at one time.

Similarly, access to the e-mail reader feature is sold on a by-port license. If a 2-port license is purchased, for example, up to 2 users can access use the e-mail reader feature to hear their e-mail over the telephone at one time.

*What's on the Mailbox General Tab? (continued on next page)*

*What's on the Mailbox General Tab? (continued)***Non-UM, Dual Message Store, and Single Message Store**

These fields indicate whether the mailbox owner is permitted to use the unified messaging feature, and if so, how the mailbox owner's voice mail and faxmail messages are to be stored.

- Non-UM

The mailbox owner is not permitted to use the unified messaging feature.

- Dual Message Store

The mailbox owner's voice mail and fax mail messages are stored on the Interchange system PC and the client PC. The mailbox owner can access these voice mail and fax mail messages, along with e-mail messages, from a Microsoft Outlook e-mail inbox application.

The system unified messaging client software must be properly configured on the mailbox owner's client PC.

- Single Message Store/TUI Browser option

The mailbox owner's voice mail and fax mail messages are copied and sent to an e-mail address. These messages are accessible, along with e-mail messages the mailbox owner receives, from any client PC e-mail inbox application.

**NOTE**

- *You must also complete the e-Mail tab and the System IMAP4 Configuration screen for this option to work. See [Setting Up e-Mail Features \(continued\)](#) further details.*
- *Consult your Interchange Technician if you have any questions about how to complete these fields.*

**Restricted Access**

If a valid mailbox number is entered into this field, the mailbox can receive messages only from other mailbox owners (also see "Client of Mailbox" on page 42).

*What's on the Mailbox General Tab? (continued on next page)*

*What's on the Mailbox General Tab? (continued)*

**Client of Mailbox**

Related to the Restricted Access option, you can use this field to enter a mailbox number if you want the restricted mailbox to send messages to its host mailbox only. A restricted mailbox cannot perform any other mailbox functions.

**Sequence to Turn on/off Message-Waiting Lamp**

These fields indicate the sequence of digits the system uses to turn on/off the message-waiting lamp at the extension associated with this mailbox. Consult your Interchange System Technician for information on the entry that must be made in this field.

**New Messages**

This field indicates the number of new messages in the mailbox, and is a read-only field (you cannot change it). A message is *new* if the mailbox owner has not yet listened to it.

Once the owner has listened to the message, it becomes an old message. A mailbox can hold a maximum of 200 messages.

**Old Messages**

This field indicates the number of old messages in the mailbox, and is a read-only field (you cannot change it).

Once the owner has listened to and/or saved a message, it becomes an *old* message. A mailbox can hold a maximum of 200 messages.

**CREATING, CHANGING, OR DELETING A MAILBOX**

You can make intricate technical modifications to the mailbox using the PC that you cannot make through the telephone interface. This guide includes instructions on making entries in fields that do not require an in-depth knowledge of the system.

Before making changes to fields other than those documented here, contact your Interchange System Technician.

**Creating a Mailbox**

**From the Mailbox screen (see *page 33*):**

- 1) Click on the *New* to display the box number prompt.
- 2) Enter the number of the box you want to create.
  - *The system makes a copy of prototype mailbox 9994 and displays the new box.*

*Creating, Changing, or Deleting a Mailbox (continued on next page)*

---

*Creating, Changing, or Deleting a Mailbox (continued)***CHANGING AN EXISTING BOX****From the Mailbox screen (see page 33):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box you to which you want to make changes.
  - *The system then displays the specified box.*
- 3) Make changes as needed.

**HINT**

- *For further details on how to change the setups for a specific mailbox, see "What's on the Mailbox Transfer Tab?" on page 44 through "Setting Up e-Mail Features" on page 75.*
  - *You can also use the system's help file at any time by pressing F1.*
- 4) Click Save to store the changes.

**DELETING A MAILBOX****From the Mailbox screen (see page 33):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box you want to delete.
  - *The system then displays the specified box.*
- 3) Make sure that the currently displayed box is the one you want to delete.
- 4) Click Delete to display a prompt asking you to confirm that you want to delete the designated box.
- 5) Click Yes to delete the specified box.

**OR**

Click No to cancel the deletion.

*Working with Mailboxes? (continued on next page)*

*Working with Mailboxes (continued)*

**USING CALL TRANSFER OPTIONS**

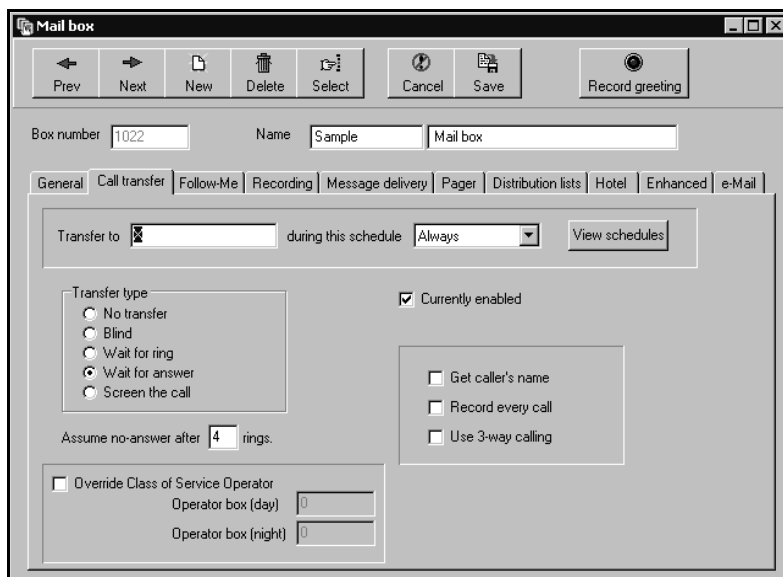
Interchange provides you with the capability to set up call transfers for each mailbox owner.

**From the Mailbox screen (see page 33):**

- 1) Click on the Call Transfer tab (see below) to display the available call transfer settings.
- 2) Set options as appropriate (see field and option descriptions on next page).

**What's on the Mailbox Transfer Tab?**

The following is a listing of descriptions for each field and option on the Transfer tab of the Mailbox screen.



**Transfer to**

This field contains the number to which the system transfers incoming calls from the auto attendant menu (in most cases, this is the extension number).

*Transfer to (continued on next page)*

*Transfer to (continued)*

If mailbox owners are working in a different location, they can specify another extension number or an external phone number instead of their office extensions.

Mailbox owners can also call in and remotely change the number in this field (unless you enclose the number in brackets). Valid entries for this field are 0 through 9, \*, #, and ten special characters shown in the following chart:

VALID "TRANSFER TO" FIELD CHARACTERS	
Character	Description
<b>P</b>	pulse (rotary) dialing
<b>T</b>	tone dialing (default)
,	(comma) short pause
<b>%</b>	medium pause (= 4 commas)
<b>L</b>	long pause (= 8 commas)
<b>!</b>	hook-flasH
<b>\F</b> (back slash and "F")	long hook-flash
<b>N</b>	no progress tones (must be last character)
<b>[ ]</b> (left AND right square brackets)	no call in change capability (enclose number inside square brackets)
<b>{ }</b> (left AND right curly brackets)	specify line group (enclose line group inside curly brackets)

**IMPORTANT!**

- *Interchange ignores all other characters, so you can use them for punctuation.*
- *To dial an external number, you must enter an E as the first character and then the phone number.*

*What's on the Mailbox Transfer Tab? (continued on next page)*

*What's on the Mailbox Call Transfer Tab? (continued)*

**during this schedule**

Use one of these options to specify when calls are transferred for the mailbox.



**NOTE**

*If the mailbox transfer type is set to No transfer or if the Currently enabled? field is unchecked, the system does not transfer calls no matter what you enter in this field (instead it plays the greeting and takes a message).*

The schedule options are as follows.

SCHEDULE OPTIONS	
Schedule	Description
<b>Always</b>	Calls are transferred at all times.
<b>Day service</b>	Calls are transferred only during Day Service, as defined in the <i>Business Hours</i> screen.
<b>Night service</b>	Calls are transferred only during Night Service, as defined in the <i>Business Hours</i> screen.
<b>SCHEDULE A, B, C, or D</b>	Calls are transferred only during the schedule, as defined by pressing the <i>View Schedules</i> button.

**Transfer type**

When the system routes a call to the mailbox, it transfers the call to the number specified in the *Transfer to:* field. Interchange offers several transfer options in the Transfer type field.

- **No transfer**—Interchange does not transfer the call. It plays the personal greeting immediately (instead of attempting to transfer the call and then playing the greeting).



**NOTE**

*If you select this option, the system will not ring the mailbox owner's extension for incoming calls. Interchange also turns off the Find Me Follow Me (FMFM) mode.*

*Transfer type (continued on next page)*

*Transfer type (continued)*

- **Blind**—Interchange transfers the call by dialing the number, then dropping out of the call. Interchange does not wait to determine if there is an answer, if the line is busy, etc. before releasing the call.

The caller will hear the busy signal, or ring no answer, or will be routed to the messaging solution for that number.

**EXAMPLE**

*Mailbox owners could use this option if they want all their calls to end up at their cell phone or home phone (and routed to their cell phone mailbox or home answering machine) instead of their the system mailbox.*

**NOTE**

*If you select this option, the system stops the FMFM mode after dialing this number on mailbox owners' lists.*

- **Wait for answer**—Interchange transfers the call by dialing the number, and monitoring the line. If the system detects an answer, it performs a blind transfer and drops out of the call. If the receiving line is busy or does not answer, the system pulls the call back and attempts the next valid number on the FMFM call list (if enabled). If there are no other valid numbers on the FMFM call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.).

*Transfer type (continued on next page)*

*Transfer type (continued)*

- **Screen the call**—Interchange transfers the call by dialing the number, and monitoring the line. If the mailbox owner answers, it gives the owner the following screening options that allows him/her to.
  - **Accept the call:** press 1.
  - **Play the currently active greeting:** press 2.
  - **Transfer a call to a *Follow me number*:** press 3.
  - **Select a personal greeting** (number 0-9): press 4.
  - **Enter an extension number** for transfer of a call: press 5.
  - **Accept the call while remaining connected\*:** press 6.

*\*Interchange remains connected and records the conversation  
as a message in the mailbox owner's mailbox*

If the receiving line is busy or does not answer, the system pulls the call back and attempts the next valid number the FMFM call list (if enabled).

If there are no other valid numbers on the FMFM call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.).

*Transfer type (continued on next page)*

*Transfer type (continued)*

- **Wait for ring**—Interchange transfers the call by dialing the number and monitoring the line. If the system detects a ring, it releases the call.

If Interchange detects a busy signal, it pulls the call back and attempts the next valid number on the FMFM call list (if enabled).

If there are no other valid numbers on the call list, the system offers options to the caller (hold, leave message, call another extension, etc.).

**EXAMPLE**

*Mailbox owners may use this option when they want all their calls to end up at their cell phone or home phone (and routed to their cell phone mailbox or home answering machine instead of their Interchange mailbox) AND they want the system to make sure the line is not busy before releasing the call.*

**Currently Enabled**

Use this field to turn the call transfer service on or off. Mailbox owners can also call in and remotely change their call transfer setup.

If you check this field, the system transfers calls to the specified number. If you do not check this field, the system does not transfer calls, but takes messages instead.

**Get caller's name**

If you check the field, the system prompts callers for their names before transferring calls (if the callers do not speak a name, the system transfers the call anyway).

If the transfer type is set to *Screen the call*, when the called party answers, the system prompts:

*"I have a call from [caller's name] for [mailbox owner's name]. Press 1 to take the call, press 2 if you would like me to take a message..."*

If the transfer type is set to *Wait for answer* (see page 47), when the called party answers, the system simply announces the caller's name and connects the call.

*What's on the Mailbox Transfer Tab? (continued on next page)*

*What's on the Mailbox Call Transfer Tab? (continued)*

**Record every call**

If you check the field, the system remains on the line after completing the transfer and records the conversation. The system then stores the recorded conversation as a message in the mailbox.

**Use 3-way calling**

This field allows three-way calling for this mailbox. Three-way calling is simply a conference call involving three parties, where one of the parties is an Interchange mailbox.

If your system is connected directly to a residential (R1) line, a single business (B1) line, or multiple business lines assigned to a multi-line hunt group, it is likely that the call transfer service is not available. If it is available, do not use three-way calling.

When in doubt, consult your Interchange System Technician for information on completing this field.

**Assume no-answer after X rings**

If the transfer type is *Wait for answer* or *Screen the call*, the Assume no-answer after X rings field tells the system how long to wait for the called party to answer before abandoning the transfer.



**NOTE**

*Units indicated are rings, except in certain integrations when the units are in seconds.*

**Override Class of Service Operator**

When enabled, this field overrides the operator designated by the mailbox's class of service, allowing you to specify an operator on a mailbox by mailbox basis. To designate an operator other than the operator specified by the mailbox class of service, enter the alternate operator's extension number in the *Operator Box*.

**Operator Box**

This field works in conjunction with the Override Class of Service Operator (see above)

*Working with Mailboxes? (continued on next page)*

*Working with Mailboxes (continued)***SETTING UP FOLLOW ME MODE**

Interchange allows you to control the Find Me Follow Me (FMFM) feature for each mailbox owner.

**From the Mailbox screen (see page 33):**

- 1) Click on the Follow Me tab (see below) to display the available Follow Me mode settings.
- 2) Set options as appropriate (see field and option descriptions below)

**What's on the Mailbox Follow Me Tab?**

The following is a listing of descriptions for each field and option on the Follow Me tab of the Mailbox screen.

Number	Transfer Type	Rings	Get Password	Caller's Name	Schedule
1001	Wait for Answer	3	No	No	Always

**Transfer to**

Should already be set up under the Call Transfer tab (see page 44).

**during this schedule**

Should already be set up under the Call Transfer tab (see page 46).

*FORWARD THE MAILBOX OWNER'S CALLS TO ANOTHER LOCATION*

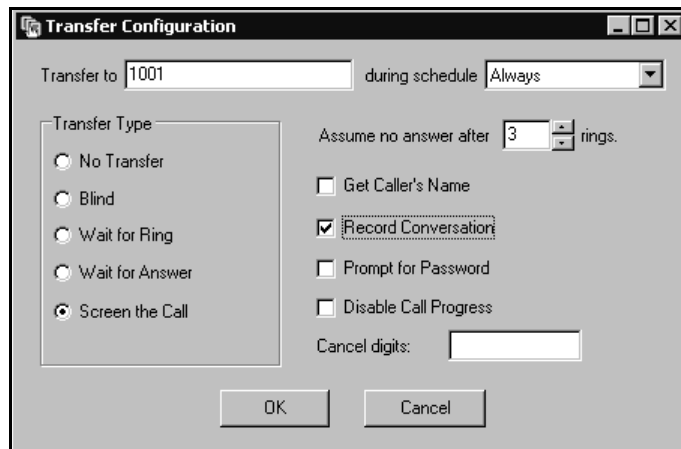
- **Do not Follow Me**—turns FMFM mode off.
- **Follow me automatically**—when a specified number of rings go unanswered on the mailbox owner's extension. The number of rings is set in the *Assume no-answer after X rings* field on the Transfer Configuration screen.
- **Follow me only when caller requests to**—when the caller presses 4 while listening to the personal message. This option allows mailbox owners to transfer only those calls most important to them, such as ones from a boss, co-worker, etc.

They can choose to tell the person beforehand that they will have the FMFM mode on (and how to activate it by pressing 4 during the personal greeting), or mailbox owners can add the instructions to their active personal greeting.

If owners do not include the instructions in their active personal greeting, all other callers will not know that the FMFM mode is on, will not press 4, and so will be sent to owners' voice mail if they are unable to take the call.

*SETTING THE FIRST TRANSFER MADE WHEN FMFM IS ENABLED*

- 1) Select the first row of the table.
- 2) Click this button to display the Transfer Configuration screen.



*Setting the First Transfer Made when FMFM Is Enabled (continued on next page)*

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*Setting the First Transfer Made when FMFM Is Enabled (continued)***Transfer to**

If mailbox owners are working in a different location, they can specify another extension number or an external phone number instead of their office extensions. Therefore, you can enter the number for the call transfer in this field.

**HINT**

- Mailbox owners can also call in and remotely change the number in this field (unless you enclose the number in brackets).
- Valid entries for this field are 0 through 9, \*, #, and ten special characters. See Valid "Transfer To" Field Characters chart on page 45.

**during this schedule**

Use this field to select the schedule during which you want the system to forward the incoming call. See Schedule Options chart on page 46 for more information.

**Transfer type**

Use this field to specify how you want calls processed.

- **No transfer**—Interchange does not transfer the call. It plays your personal greeting immediately (instead of attempting to transfer the call and then playing the greeting). If you select this option, you are turning off the FMFM mode.
- **Blind**—Interchange transfers the call by dialing the number, then dropping out of the call. If you select this option, the system stops the FMFM mode after dialing the this number on your list. Interchange does not wait to determine if you answer, the line is busy, etc. before releasing the call. The caller will hear the busy signal, or ring no answer, or will be routed to the messaging solution for that number. For example, use this option if you want all your calls to end up at your cell phone or home phone (and routed to your cell phone mailbox or home answering machine) instead of your Interchange mailbox.

*Transfer Type (continued on next page)*

*Transfer Type (continued)*

- **Wait for answer**—Interchange transfers the call by dialing the number, and monitoring the line. If the system detects an answer, it performs a blind transfer and drops out of the call. If the receiving line is busy or does not answer, Interchange pulls the call back and attempts the next valid number on your FMFM call list. If there are no other valid numbers on your call list, the system offers options to the caller (hold, leave message, call another extension, etc.).
- **Screen the call**—Interchange transfers the call by dialing the number, and monitoring the line. If you answer, it plays a system prompt giving you six screening options (Press 1 to accept the call, Press 2 to play currently active greeting, Press 3 to transfer this caller to the number in the *Follow me only when the caller requests to* field [on the Follow-Me tab], Press 4 to play a personal greeting [number 0-9], Press 5 to enter an extension number to which the system will transfer the caller., or Press 6 to accept the call. Interchange remains connected and records the conversation as a message in the mailbox.). If the receiving line is busy or does not answer, the system pulls the call back and attempts the next valid number on your FMFM call list. If there are no other valid numbers on your call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.).
- **Wait for ring**—Interchange transfers the call by dialing the number and monitoring the line. If the system detects a ring, it releases the call. If Interchange detects a busy signal, it pulls the call back and attempts the next valid number on your FMFM call list. If there are no other valid numbers on your call list, the system offers options to the caller (hold, leave message, call another extension, etc.). For example, use this option if you want all the calls to end up at the mailbox owners cell phone or home phone (and routed to their cell phone mailbox or home answering machine instead of their Interchange mailbox) AND you want the system to make sure the line is not busy before releasing the call.

*Setting the First Transfer Made when FMFM Is Enabled (continued on next page)*

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*Setting the First Transfer Made when FMFM Is Enabled (continued)***Assume no-answer after X rings**

Use this field to enter the number of rings you want to allow before the system considers the attempted transfer a no answer. The *Follow me mode* field and the *Wait for Answer* and *Screen the Call* options on the Transfer type field use this number.

If you selected *Screen the Call* or *Wait for Answer* as the type of transfer, you can enter further instructions for the transfer in the *Get Caller's Name*, *Record Conversation*, *Prompt for Password*, *Disable Call Progress*, and *Cancel digits* fields.

**NOTE**

*If you selected No Transfer, Blind, or Wait for Ring as the transfer type, Interchange does not let you select any of these other fields.*

**Get caller's name**

This field is used for *Wait for Answer* and *Screen the Call* transfer types only. If you set this field on (checked), the system asks callers for their name and then announces the name to you before connecting the call.

**Record Conversation**

This field is used for *Wait for Answer* and *Screen the Call* transfer types only. If you set this field on (checked), Interchange remains on the line after completing the transfer, records the conversation, and stores it as a message the mailbox owner's mailbox.

**Prompt for Password**

This field is used for *Screen the Call* transfer types only. If you set this field on (checked), the system prompts mailbox owners to enter their mailbox password before transferring the call.

**Disable Call Progress**

This field is used for *Screen the Call* transfer types only. If you set this field on (checked), Interchange does not try to detect call progress tones (i.e., ringing) after dialing the FMFM number.

Select this option if the FMFM number the system must call has unusual ringing patterns that the system may not recognize.

Otherwise, if Interchange does not effectively detect ringing, it will not wait for an answer to connect the caller to the number, and will proceed instead with attempting to dial the next Follow Me number entered on the screen.

*Setting the First Transfer Made when FMFM Is Enabled (continued on next page)*

*Setting the First Transfer Made when FMFM Is Enabled (continued)***Cancel digits**

This field is used for *Screen the Call* transfer types only. If you enter a string of numbers in this field, the system sends the DTMF tones for those digits to the calling number if the system does not detect a keypress response after playing the screening options. These cancel digits prevent the calling number from recording a message of Interchange's voice prompts.

**EXAMPLE**

*Most mailbox owners want to avoid a blank message in their cell phone mailbox. Enter the appropriate stop message code in this field. Once the system detects no response to the screening options, it sends out the DTMF tones to their cell phone number (which stops their cell phone mailbox from recording a message). It then pulls the call back to continue on with the Follow Me mode.*

*If you do not know the DTMF code for stopping a message recording in the cell phone mailbox, have the mailbox owner contact their cell phone service provider.*

**SET UP ANY ADDITIONAL TRANSFERS**

After you set up the initial transfer option (as described on previous pages starting on page 52), you can now set up any additional transfers that you want Interchange to attempt when FMFM is enabled (up a maximum of ten transfers).

In the subsequent rows of the table, complete the fields in the same manner as for the first transfer. Interchange will attempt each transfer in the order you set them up on the Transfer page, and based on whatever schedule you associate with any given number.

*Set up any additional transfers (continued on next page)*

**Set up Any Additional Transfers (continued)**

If the system cannot reach the mailbox owner at any of the alternate numbers (no answer), it will return the caller to the owner's personal mailbox and instruct the caller to leave a message.

**NOTE**

*Mailbox owners can only use the FMFM feature if you permit them to use it.*

*If FMFM is allowed for an owner's class of service, owners can change their FMFM settings at will using the Personal Administration Tool or using the phone menus.*

*If you want to turn off FMFM for a specific mailbox owner, change the owner's class of service to one that does not allow FMFM.*

*If you do not change the class of service, and only check the Do not Follow Me field, the mailbox owner will still have access to the FMFM settings and can turn FMFM back on.*

*Working with Mailboxes? (continued on next page)*

*Working with Mailboxes (continued)*

**SETTING UP RECORDING**

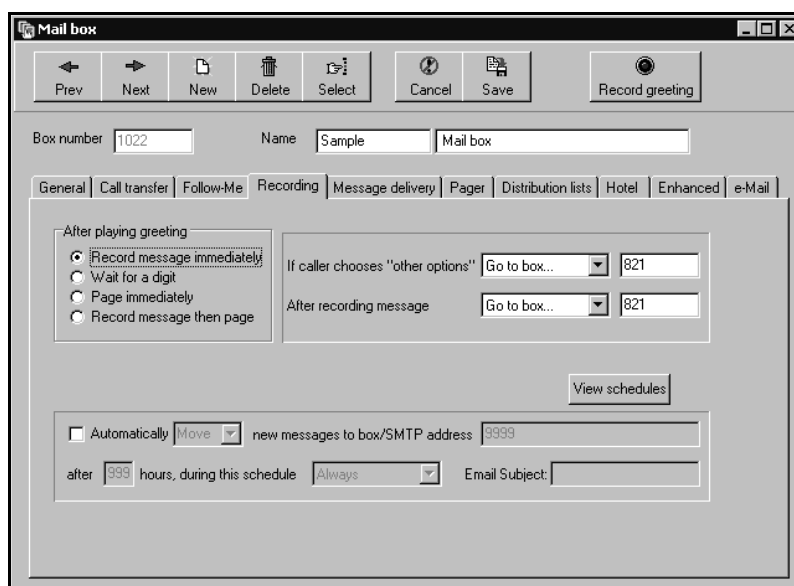
Interchange allows you to control the Recording feature for each mailbox owner.

**From the Mailbox screen (see page 33):**

- 1) Click on the Recording tab (see below) to display the available recording settings.
- 2) Set options as appropriate (see field and option descriptions below).

**What's on the Recording Tab?**

The following is a listing of descriptions for each field and option on the Recording tab of the Mailbox screen.



*What's on the Mailbox Recording Tab? (continued on next page)*

*What's on the Mailbox Recording Tab? (continued)***After Playing Greeting**

This area of the screen shows the options available to the caller after the system plays the mailbox owner's greeting. When callers have been routed to a mailbox and are listening to the greeting, they *always* have various options available by dialing the appropriate digit.

If the caller does *not* dial a digit by the time the system finishes playing the greeting, the system immediately takes whatever action is specified in this field. If the caller *does* dial a valid digit from the available options, his/her selection overrides the action entered in this field.

- **Record Immediately** - If you select this option, the system plays the prompt, "Please speak after the tone," and records the caller's message.

**NOTE**

*If the caller hangs up while the system is playing the mailbox greeting, the system might begin recording a message before it detects that the call has ended.*

*When this happens, the mailbox ends up containing a short, blank message. You can eliminate these false messages by selecting the Wait for a Digit option rather than Record Immediately.*

- **Wait for a digit** - If you check this option, the system gives the caller more time to enter a digit. Use this option only when the mailbox owner, in the personal greeting, instructs the caller to choose an option.

If the caller does not enter a digit, the system then takes whatever action is specified in the After Leaving Message field.

If the caller hangs up while the system is playing the mailbox greeting, the system might begin recording a message before it detects that the call has ended.

When this happens, the mailbox ends up containing a short, blank message. You can eliminate these false messages by selecting the Wait for a Digit option rather than Record Immediately.

*After Playing Greeting (continued on next page)*

*After Playing Greeting (continued)*

- **Page Immediately** - If you select this option, the system looks at what type of pager this mailbox is using.

If the Pager Type field is set to *None* or the Pager Number field is blank, the system takes whatever action is specified in the After Recording Message field.

If the Pager Type field is set to *Tone*, the system takes a message and calls the mailbox owner's pager.

If the Pager Type field is set to *Display/Digital*, the system asks the caller to enter his/her own telephone number then calls the mailbox owner's pager and relays that number (no message is taken).

**NOTE**

*If the Pager Type field is set to Display/Digital and the Pager notification service is currently turned off (either manually or due to the call schedule), callers hear the system prompt, "I'm sorry, I am unable to page that party right now,". The call then continues by taking whatever action is specified in the After Recording Message field (see page 62).*

- **Record message then page** - If you select this option, the system looks at what type of pager this mailbox is using.  
If the Pager Type field is set to *None* or the Pager Number field is blank, the system records a message, but does not activate the pager.  
If the Pager Type field is set to *Tone*, the system takes a message and calls the mailbox owner's pager.  
If the Pager Type field is set to *Display/Digital*, the system records a message, then calls the pager. It sends the mailbox number to the pager display.

*After Playing Greeting (continued on next page)*

*After Playing Greeting (continued)*

- **If caller chooses “other options”** - This field gives callers more options, if they press 3 during the mailbox greeting. These other options include the following.

IF CALLER CHOOSES “OTHER OPTIONS” OPTIONS	
Option	Description
<b>Go to box</b>	Allows the call to route to another box. The new box number is entered in the next field to the right. This box is usually a routing box containing a greeting or menu, or it is the mailbox number of an individual taking calls for this mailbox owner.
<b>Say goodbye</b>	The system says, “ <i>Good-bye</i> ,” and hangs up.
<b>Return</b>	The system goes back to the previous box that handled this call (usually a routing box).
<b>Hang up</b>	The system immediately terminates the call by going on-hook.

*What's on the Mailbox Recording Tab? (continued on next page)*

*What's on the Mailbox Call Recording Tab? (continued)*

**After Recording Message**

This field gives callers more options after they record a message. These other options include the following.

AFTER RECORDING MESSAGE	
Option	Description
<b>Go to box</b>	Allows the call to route to another box. The new box number is entered in the next field to the right. This box is usually a routing box containing a greeting or menu, or it is the mailbox number of an individual taking calls for this mailbox owner.
<b>Say goodbye</b>	The system says, "Good-bye," and hangs up.
<b>Return</b>	The system goes back to the previous box that handled this call (usually a routing box).
<b>Hang up</b>	The system immediately terminates the call by going on-hook.

The system follows the action specified here when:

- Callers have recorded their message, pressed # for further options, and pressed 1 to send or 4 to cancel the message.
- The After Playing Greeting field is set to *Wait for digit*, and the caller did not enter a digit.
- The After Playing Greeting field is set for a paging option, but the pager's Enabled field is set to *No* (in this case, the caller first hears the system prompt, "I am not able to page that party right now.").

*What's on the Mailbox Recording Tab? (continued on next page)*

*What's on the Mailbox Call Recording Tab? (continued)***Automatically X new messages to box/SMTP address X after X hours, during this schedule**

If a message has been in a mailbox for the number of hours specified in this field, but has not yet been listened to by the owner, the system forwards/moves/copies the message to another mailbox or to a group box.

To disable the auto-forward/move/copy feature, leave this field blank.

**NOTE**

*If you have this field set to forward, the system automatically deletes the original copy from the original mailbox.*

*When a mailbox receives a message that the system has auto-forwarded, the system informs the mailbox owner by saying, "This message was automatically forwarded from [name of original recipient]."*

You can specify when you want the system to automatically forward/move/copy new messages. Your options include the following.

AUTOMATICALLY FORWARD/MOVE/COPY NEW MESSAGES	
Schedule	Result
Always	Automatically forward/move/copy is available at all times.
Day service	Automatically forward/move/copy is available only during Day Service, as defined on the <i>Business Hours</i> screen.
Night service	Automatically forward/move/copy is available only during Night Service, as defined on the <i>Business Hours</i> screen.
Schedule A, B, C, or D	Automatically forward/move/copy is available only during the schedule, as defined on the <i>View Schedules</i> button.

*Working with Mailboxes (continued on next page)*

*Working with Mailboxes (continued)*

## SETTING UP MESSAGE DELIVERY

Interchange allows you to control the Message Delivery feature for each mailbox owner.

**From the Mailbox screen (see *page 33*):**

- 1) Click on the Message Delivery tab (see next page) to display the available message delivery settings.
- 2) Set options as appropriate (see field and option descriptions on next page).



**IMPORTANT!**

*You must have the Currently Enabled box checked on the Transfer Tab if you want to use message delivery. If you do not check that box, the system ignores whatever settings you enter on this screen.*



**HINT**

*A mailbox owner can call in remotely and turn the message delivery feature on or off, or change the first number to be called. The other telephone numbers, if in use, cannot be changed remotely.*

*Setting Up Message Delivery (continued on next page)*

*Setting Up Message Delivery (continued)***What's on the Message Delivery Tab?**

The following is a listing of descriptions for each field and option on the Message Delivery tab of the Mailbox screen.

**Call**

In this field, enter the telephone number you want the system to call to inform the mailbox owners that there are new message in their mailboxes. This field can contain the DTMF digits 0-9, the characters \* and #, and other special characters. Consult your Interchange System Technician for information on completing this field.

The owner of a mailbox can call in and remotely change only the first *Call* number, and cannot indicate special characters.

**X times**

Use this field to specify the number of successful attempts that the system is to make to each telephone number. A successful attempt is generally defined as one where the system has seized an available line port, dialed the number, and detected ringing.

If the attempt is not successful (for example, the called number was busy) the system automatically re-tries every few seconds up to twenty times.

*What's on the Recording Tab? (continued on next page)*

*What's on the Recording Tab? (continued)*

**At intervals of**

Use this field to specify the interval (in minutes) between calls to this number and/or the interval before proceeding to the next call number sequence.

**during X**

Use one of these options to specify when the system is to deliver messages to this number. The options are as follows:

DURING X OPTIONS	
Schedule	Result
<b>Always</b>	Message delivery is available at all times.
<b>Day service</b>	Message delivery is available only during Day Service, as defined on the BUSINESS HOURS screen.
<b>Night service</b>	Message delivery is available only during Night Service, as defined on the BUSINESS HOURS screen.
<b>Schedule A, B, C, or D</b>	Message delivery is available only during the schedule, as defined on the View Schedules button.

**Run this cycle X times**

Use this field to specify the number of times the system is to run the message delivery sequence. Once the system calls every number listed, it has run the message delivery sequence one time.

*What's on the Recording Tab? (continued on next page)*

*What's on the Recording Tab? (continued)***Deliver These Messages**

Use one these options to specify which messages the system is to deliver. Your options include the following.

DELIVER THESE OPTIONS	
Option	Description
<b>Voice</b>	The system delivers voice messages received in the mailbox.
<b>e-Mail</b>	The system delivers e-mail messages received in the mailbox via the unified messaging feature.
<b>Only when marked urgent</b>	The system delivers only messages voice mail and/or e-mail messages marked as urgent. Non-urgent messages are not delivered.

**SETTING UP PAGER NOTIFICATION**

Interchange allows you to control the Pager Notification feature for each mailbox owner.

**From the Mailbox screen (see page 33):**

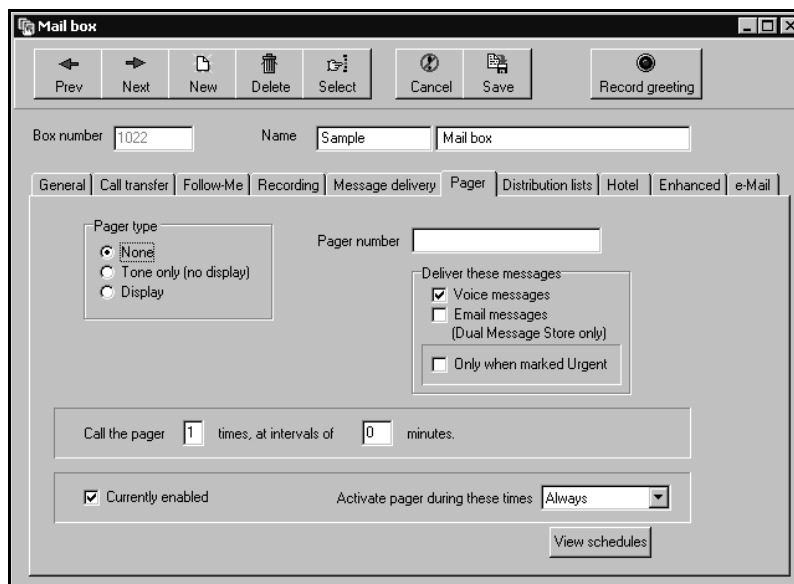
- 1) Click on the Pager Notification (see next page) to display the available pager notification settings.
- 2) Set options as appropriate (see field and option descriptions on next page).

*Setting Up Pager Notification (continued on next page)*

*Setting Up Pager Notification (continued)*

**What's on the Pager Notification Tab?**

The following is a listing of descriptions for each field and option on the Pager Notification tab of the Mailbox screen.



**Pager type**

When a caller asks the system to page a mailbox owner, the system looks for a free line on which to call the paging service. If no lines are free to make the call, the system queues the request and re-tries every 10 seconds for about 10 minutes.

This area of the screen allows you to choose what type of pager the mailbox owner has:

- **None** - no pager
- **Tone only** - if the pager has no display
- **Display** - for using pagers that DO have a display

*What's on the Pager Notification Tab? (continued on next page)*

*What's on the Pager Notification Tab? (continued)***Pager Number**

Use this field to enter the telephone number of the paging service. The mailbox owner may change this number remotely. Normally, access codes for outside lines are not required here.

To restrict pager calls to use lines in a particular line group, enter the letter (A, B, C, or D) of the line group in braces { } before the telephone number (for example, {A}5551212). Consult your Interchange System Technician for more information.

You can set up tone or voice pagers in the Message Delivery portion of this screen. Consult your Interchange System Technician for more information.

The pager number can contain the digits 0 through 9 and the characters \* and pound #, as well as the several special characters. Consult your Interchange System Technician for more information.

**Call the pager X times**

The system calls the pager the number of times indicated in this field. This can be useful in circumstances when the pager is turned off for a period or is temporarily out of pager range.

**At intervals of**

Use this field to specify the interval (in minutes) between calls to this number and/or the interval before proceeding to the next call number sequence.

**Activate pager during these times**

Use one of these options to specify when you want the system to deliver pager notification to this number. The options are as follows:

ACTIVATE PAGER DURING THESE TIMES	
Schedule	Result
<b>Always</b>	Pager notification is available at all times.
<b>Day service</b>	Pager notification is available only during Day Service, as defined on the <i>Business Hours</i> screen.
<b>Night service</b>	Pager notification is available only during Night Service, as defined on the <i>Business Hours</i> screen.
<b>Schedule A, B, C, or D</b>	Pager notification is available only during the schedule, as defined on the <i>View Schedules</i> button.

*What's on the Pager Notification Tab? (continued on next page)*

*What's on the Pager Notification Tab? (continued)*

**Currently enabled**

Use this field to turn the service on or off from the keyboard. If this field is set checked, the pager feature for this mailbox is currently on. If this field is unchecked, the pager feature is off.



**HINT**

*The mailbox owner also can call in and remotely turn the pager notification service on or off.*



**IMPORTANT!**

*Leaving this option "unchecked" forces the system overrides the call schedule set in the previous field.*

**SETTING UP DISTRIBUTION LISTS**

Interchange allows you to control the Distribution Lists feature for each mailbox owner. Each mailbox owner can create up to four personal distribution lists, each containing up to 20 mailbox numbers.

**From the Mailbox screen (see page 33):**

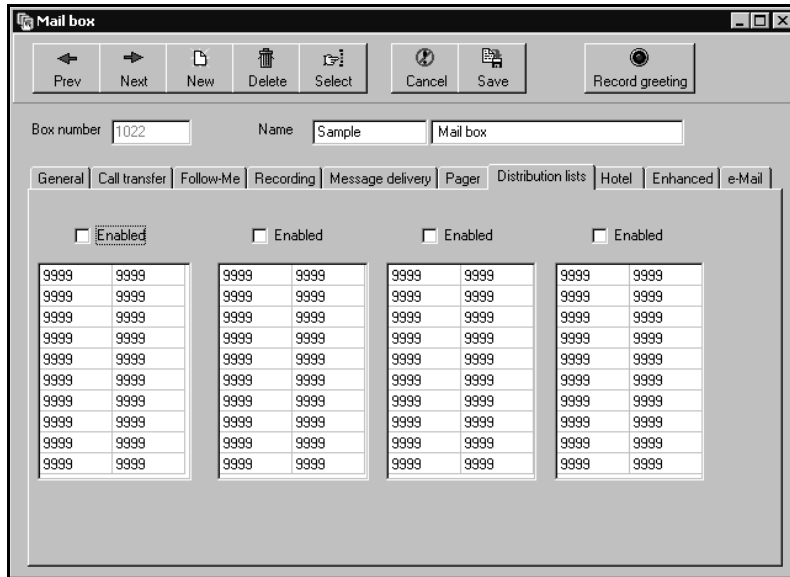
- 1) Click on the Distribution Lists (see next page) to display the available distribution list settings.
- 2) Set options as appropriate (see field and option descriptions on next page).

*Setting Up Distribution Lists (continued on next page)*

Setting Up Distribution Lists (continued)

**What's on the Distribution Lists Tab?**

The following is a listing of descriptions for each field and option on the Distribution Lists tab of the Mailbox screen.



**Enabled**

Use this option when you want to specify when the corresponding distribution list below the field is available to the mailbox owner.



**NOTE**

*If Enabled is checked, the list is active for the mailbox owner; if Enabled is not checked, the list is not active for the mailbox owner.*

The table below the Enabled field indicate the mailboxes currently included as part of the distribution list. Only mailboxes can be members of a personal distribution list (you cannot include a group box on the list).

Working with Mailboxes (continued on next page)

*Working with Mailboxes (continued)*

### SETTING UP HOTEL FEATURE

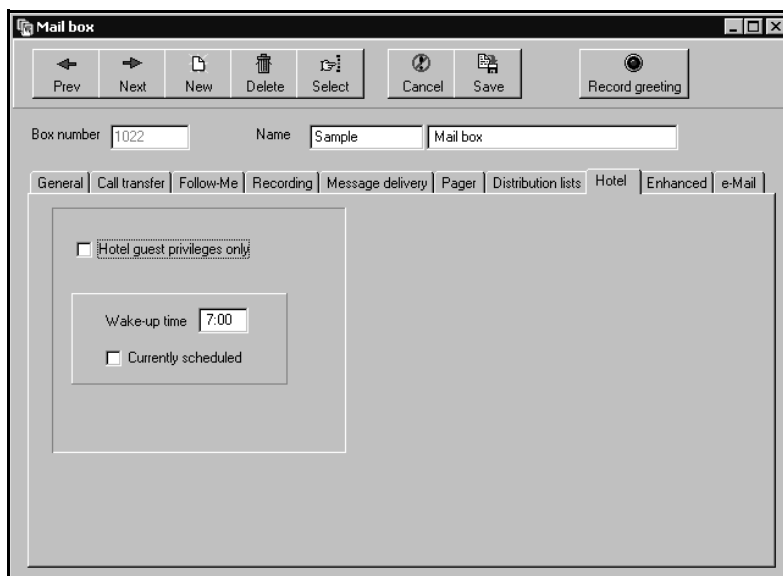
Interchange allows you to control the Hotel feature for each mailbox owner.

**From the Mailbox screen (see page 33):**

- 1) Click on the Hotel tab (see below) to display the available hotel settings.
- 2) Set options as appropriate (see field and option descriptions below).

### What's on the Hotel Tab?

The following is a listing of descriptions for each field and option on the Hotel tab of the Mailbox screen.



*What's on the Hotel Tab? (continued on next page)*

*What's on the Hotel Tab? (continued)***Hotel guest privileges only**

If you check this field, the system restricts the options available to the mailbox. When the mailbox owner opens the mailbox, the only options are listening to messages or scheduling a wake-up call.

**Wake-up time**

Use this field to specify a time for a call to be placed to the extension listed in the Transfer to field. Interchange does not actually place the call at the time specified here unless the wake-up time is currently scheduled. The mailbox owner can also schedule a wake-up call by calling into the system.

**Currently Scheduled**

If you check this field, the system calls the extension listed in the Transfer to field, at the time specified in the Wake-up time field.

**SETTING UP ENHANCED FEATURES**

Interchange allows you to control the Enhanced features for each mailbox owner.

**From the Mailbox screen (see *page 33*):**

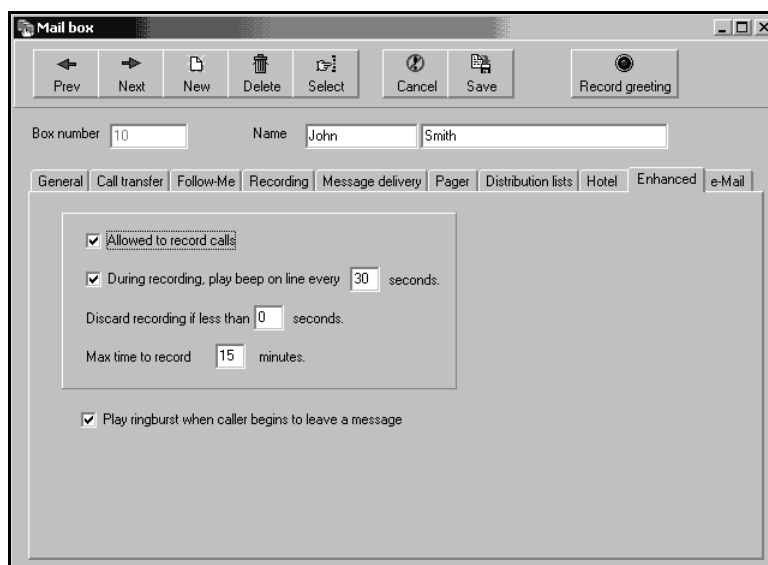
- 1) Click on the Enhanced (see next page) to display the available enhanced settings.
- 2) Set options as appropriate (see field and option descriptions on next page).

*Setting Up Enhanced Features (continued on next page)*

*Setting Up Enhanced Features (continued)*

**What's on the Enhanced Tab?**

This screen contains fields that are functional only with certain phone systems that provide call recording capabilities. The following is a listing of descriptions for each field and option on the Enhanced tab of the Mailbox screen.



**Allowed to record calls**

This field allows you to specify if the mailbox owner is permitted to use the record call feature.

**During recording, play beep every...**

This field allows you to specify how often a beep (audible to all conversation participants) is to sound during recordings. If you do not specify a time, no beep will be sounded.

**Discard recording if less than...**

This field allows you to specify the minimum length in seconds a recording must be to be retained on the system.

*What's on the Enhanced Tab? (continued on next page)*

*What's on the Enhanced Tab (continued)*

**Max time to record**

This field allows you to specify the maximum number of recording minutes allowed per call

**Play ringburst when caller begins to leave a message**

and whether, when a caller is prompted to leave a message in the mailbox, a short ringburst is to sound on the mailbox owner's phone.



**NOTE**

*Each recorded call is stored as a new message in the mailbox owner's voice mailbox.*

**SETTING UP E-MAIL FEATURES**

Interchange allows you to control the e-Mail features for each mailbox owner.

**From the Mailbox screen (see page 33):**

- 1) Click on the e-Mail (see next page) to display the available e-mail settings.
- 2) Set options as appropriate (see field and option descriptions on next page).

*Setting Up e-Mail Features (continued on next page)*

*Setting Up e-Mail Features (continued)*

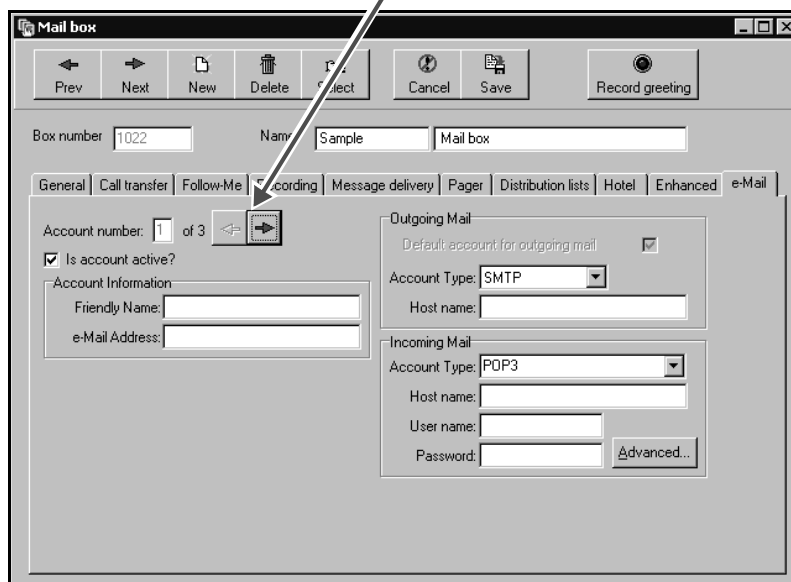
**What's on the e-Mail Tab?**

The following is a listing of descriptions for each field and option on the e-Mail tab of the Mailbox screen.

If the mailbox owner has more than one e-mail account, the e-Mail tab can include information for up to three different accounts.

Once all fields are completed on this screen for the first e-mail account, you can access a second and third e-mail tab to enter information for additional accounts by clicking on the left and right arrow buttons next to the Account number field.

Click the arrows here to access and enter information for additional e-mail accounts.



**NOTE**

*The e-mail reader will not be able to play e-mail over the telephone for any account that is not set up on the mailbox owner's desktop.*

*What's on the e-Mail Tab? (continued on next page)*

***What's on the e-Mail Tab (continued)*****Is account active?**

Use this option to specify when the account is active for the mailbox owner. The e-mail reader will not access voice and e-mails for inactive accounts.

**Friendly Name**

Use this field to specify the name you want the system to display in the *From* field, on messages recipients receive in their e-mail Inbox from this mailbox owner. Typically, the Friendly Name is simply the mailbox owner's first and last name.

**e-Mail address**

Enter the e-mail address you want the system to use to send the mailbox owner's e-mail messages in this field.

**Default account for outgoing mail field**

This option only applies if more than one e-Mail account is active for this mailbox owner. Check the field on the appropriate e-Mail tab to indicate which account you want the system to use when sending outgoing e-mail.

**Account type (*outgoing*)**

This field in the Outgoing Mail section is used for Unified Messaging and Single Store Messaging; it tells the system what method to use when sending messages to the e-mail server.

Your input in this field should correspond to what message store options you chose on the General tab of the Mailbox menu (i.e., non-UM, Dual Message Store, or Single Message Store).

Consult your Interchange System Technician if you have any questions about how to complete this field.

**Host name**

This field in the Outgoing Mail section indicates the name assigned to the e-mail server that is to be used to send the mailbox owner's outgoing e-mail.

**Account type - *incoming***

This field in the Incoming Mail section is used for Unified Messaging and Single Store Messaging (see next page). It tells the system what method to use when communicating with the e-mail server.

*Account type - incoming (continued on next page)*

*Account type - incoming (continued)*

Your input in this field should correspond to what message store options you chose on the General tab of the Mailbox menu (i.e., non-UM, Dual Message Store, or Single Message Store - see page 41).

- When a mailbox is set up to use Single Message Store, Interchange communicates with e-mail servers via POP3 or IMAP4 technology.
- When TUI Browser is enabled, the system must use IMAP4 technology.



**NOTE**

*You will tell the system how to log into the mailbox owner's e-mail account on the e-mail server in the User name and Password fields.*

- *Although you can select POP3, IMAP4, or IMAP4 WITH ADMINISTRATOR ID from this drop down menu, Vertical recommends IMAP4 WITH ADMINISTRATOR ID.*
- *If you select POP3 or IMAP4 in this field, you must update the Password field manually each time mailbox owners change their e-mail login passwords.*
- *If you do not update it, e-mails can no longer be retrieved for the mailbox owner.*
- *To avoid the issues associated with password changes, select IMAP4 W/ ADMINISTRATOR ID in this field and set up a user with Administrator login rights on the IMAP4 e-mail server. Consult your Interchange System Technician if you need more information.*

**Host name**

Use this field in the Incoming Mail section indicates the name assigned to the e-mail server that receives the mailbox owner's incoming e-mail.

*What's on the e-Mail Tab? (continued on next page)*

*What's on the e-Mail Tab (continued)***User name**

Use this field in the Incoming Mail section to specify the user name the mailbox owner uses to log on to the e-mail server that receives the mailbox owner's incoming e-mail.

**Password**

Use this field in the Incoming Mail section indicates the password the mailbox owner uses to log on to the e-mail server that receives the mailbox owner's incoming e-mail.

**NOTE**

*Alert mailbox owners that if they change their e-mail server access password at any time, you must update it on e-Mail tab.*

*If the password is not up-to-date, mailbox owners attempting a system log in may find that their computer is locked. This occurs because when the Inbox is not up and running on a client PC desktop, the PEC attempts to access e-mails from the e-mail server on the client PC's behalf.*

*It must log on to e-mail server using the password you provide here. If it attempts to log on with the password you enter in this field after this password has been changed by the mailbox owner, after several log in attempts, the server may lock down the client PC.*

*Be particularly aware of this in an Exchange Server environment, since anytime mailbox owners change their network login password in this setting, they must inform you.*

**Advanced**

If you click on the Advanced button from the e-Mail tab, the system displays the Advanced Properties screen. This screen is only applicable in environments where an Exchange Server e-mail server is used with the Exchange Service. Do not alter the defaults on this screen unless authorized to do so by your Interchange System Technician.

*Working with Mailboxes (continued on next page)*

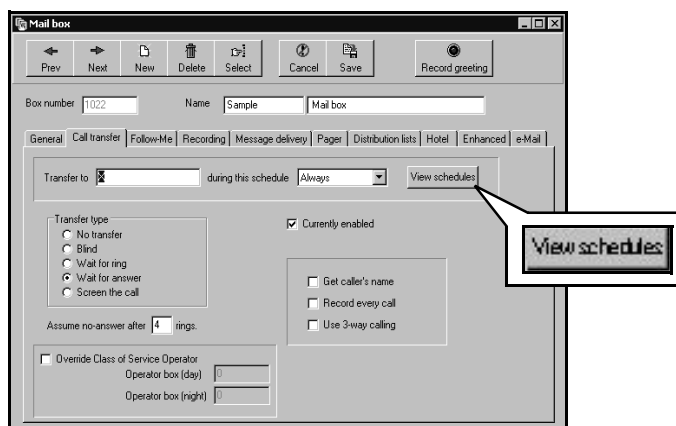
*Working with Mailboxes (continued)*

## SETTING UP SCHEDULES

Interchange allows you to set up schedules for each mailbox owner. These schedules can be used to allow or disallow certain functions: call transfers, follow me, recording, message delivery, or pager.

**From the Mailbox screen (see *page 33*):**

- 1) Click on any of the following tabs to access a View Schedules button: Call transfer, Follow-Me, Recording, Message delivery, or Pager.
- 2) Click on the View Schedules button to display the Schedules window.



- 3) Set options as appropriate (see field and option descriptions on next page).

*Setting Up Schedules (continued on next page)*

*Setting Up Schedules (continued)***What's on the View Schedules Screen?**

The four schedules (A, B, C, and D) can be applied to any of five features: call transfer, find-me-follow-me, pager notification, automatic forwarding of new messages, and message delivery.

The feature or features assigned to a schedule operate only between the Begin and End times for the days specified.

The following is a listing of descriptions for each field on the View Schedules screen.

	Schedule A		Schedule B		Schedule C		Schedule D	
	Begin	End	Begin	End	Begin	End	Begin	End
Sunday	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Monday	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Tuesday	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Wednesday	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Thursday	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Friday	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Saturday	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00

**Begin**

This field displays the time at which this schedule begins on the day. Time is indicated in 24-hour format (for example, 8:00 PM is specified as 20:00).

**End**

This field displays the time at which this schedule ends on the day. Time is indicated in 24-hour format (for example, 8:00 PM is specified as 20:00).

**NOTE**

*If you want the schedule to be active all day, enter 00:00 for the Begin time and 24:00 for the End time.*

## Using Class of Service Settings

Each mailbox on the system is assigned a class of service. The class of service assigned to the box dictates which system features the mailbox owners have access to and how they can use those features.

To control a mailbox owner's (or a group of mailbox owners') access to certain system features, modify the class of service assigned to the mailbox. Keep in mind that the class of service modifications you make affect all mailboxes assigned that class of service.

There are 32 classes of services (0 through 31) that you can set up and then apply to mailboxes on the system. Two of them are pre-configured on the system. Class of service 0 is assigned by default to the prototype mailbox 9994, which serves as a template for every mailbox that you create on the system. Class of service 7 is assigned supervisor mailbox privileges by default.

### MODIFYING CLASS OF SERVICE

You can view and change the class of service number assigned to a mailbox by accessing the Mailbox screen for the mailbox. For further details on changing a mailbox setup, see *"Creating, Changing, or Deleting a Mailbox"* on page 42.

### Accessing the Class of Service Screen

You can easily make changes to the Class of Service screen to modify classes of service you assign to mailboxes.

#### From the main menu of the main screen:

Go to *System* ► *Class of Service* to display the Class of Service screen.

**HINT**

*For further details on how to change the setups for a specific class of service, as described on the following pages.*

*Modifying Class of Service (continued on next page)*

*Modifying Class of Service (continued)***What's on the Class of Service Screen?**

The following is a listing of descriptions for each field and option on the Class of Service screen.

**Class of service number**

This field shows the current class of service. Once you assign a class of service to a mailbox, the mailbox inherits all the privileges and restrictions defined in the class of service.

**Next & Prev**

You can use these buttons to change the class of service number.

**Class of service name**

Use this field to enter a meaningful name for the selected the class of service. Choose a name to help remind you of the purpose for the class of service. Sample names include *Supervisors*, *Mailbox Owners*, etc.

*What's on the Class of Service Screen? (continued on next page)*

*What's on the Class of Service Screen? (continued)*

**Operator box (day) & Operator box (night)**

When a caller is listening to a mailbox greeting, one of the options is to dial zero to reach an operator. Use these fields to tell the system where to route the call if the caller dials zero.

- The default setting is 888.

**When exiting open Mail box, go to box**

When mailbox owners have called in to their boxes, have finished listening to messages, changing options, etc., and have elected to exit from the Main Menu, this field tells the system where to send the call.

- Retain the default setting in this field as 821.

**Supervisor status**

This option determines whether or not mailboxes belonging to this class of service should have supervisor privileges. A supervisor can perform certain actions not available to regular mailbox owners.



**EXAMPLE**

*Supervisor can add a mailbox or delete a mailbox by calling in from any telephone. The default setting in class of service 0 is no (unchecked), and in class of service 7 is yes (checked).*

**Access to Group boxes**

By enabling this option, you allow mailbox owners assigned this class of service to access all group boxes set up on the system. If you set the field off (unchecked), the mailbox owners in this class of service will not be able to access any group boxes.

- The default setting is for this option to be enabled (on).

**Dial-out allowed**

Use this field to specify whether or not the owner of a mailbox belonging to this class of service is allowed to place outgoing calls from the mailbox.

- The default setting is for this option to be disabled (off).

*What's on the Class of Service Screen? (continued on next page)*

*What's on the Class of Service Screen? (continued)***Callers can page via PA system**

When a caller is listening to a mailbox owner's greeting, one of the features the system offers is the option to have the call announced over the P.A. system.

Use this option to allow or deny access to the P.A. feature for callers to mailboxes belonging to this class of service.

- The default setting is for this option to be enabled (on).

**Allowed to receive Fax-mail**

This option only applies only if your system has the optional FaxMail module installed. If you want to allow mailboxes in this class of service to receive FaxMail, check this field to turn it on. Make sure it is unchecked if you do not want callers to be able to send fax documents into these mailboxes.

- The default setting is for this option to be disabled (off).

**Allowed to use Follow Me**

Use this option if you want the mailboxes in this class of service to be allowed to use the Find Me Follow Me feature. Make sure it is unchecked if you want to restrict the Follow Me feature from this class of service.

- The default setting is for this option to be disabled (off).

*Using Class of Service Settings (continued on next page)*

*Using Class of Service Settings (continued)*

**CONTROLLING MESSAGES**

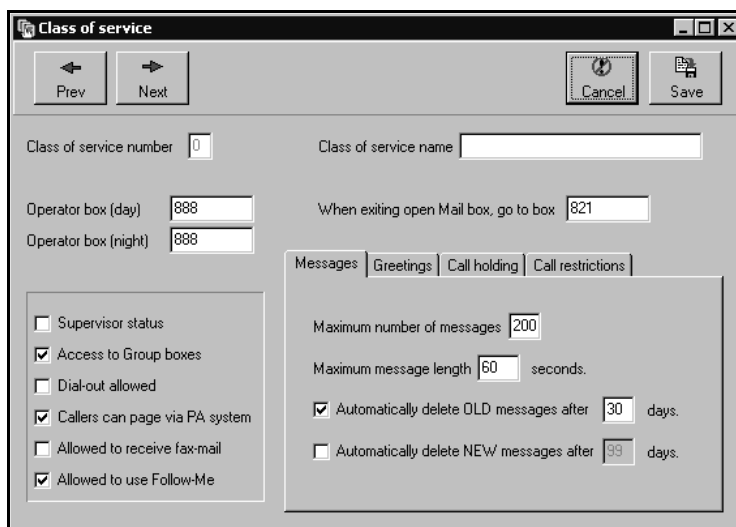
You can use these options to control what types of messages are allowed for a particular class of service.

**From the Class of Service screen (see page 82):**

- 1) Click on the Messages tab (see below) to display the available message settings.
- 2) Set options as appropriate (see field and option descriptions below).

**What's on the Messages Tab?**

The following is a listing of descriptions for each field and option on the Messages tab.



**Maximum number of messages**

The system can hold up to 250 messages per mailbox. However, to conserve disk space, you may want to restrict some mailboxes to a lower limit. Use this field to set the maximum number of messages that can be stored in mailboxes assigned this class of service.

Once the limit is reached for a particular mailbox, callers attempting to leave more messages in the mailbox are told that the box is full.

- The default setting is 200.

*What's on the Messages Tab? (continued on next page)*

*What's on the Messages Tab? (continued)***Maximum message length X seconds**

The value in this field defines the maximum length of a message (in seconds) that a caller can leave for mailboxes belonging to this class of service.

- The default setting is 60 seconds.

**Automatically delete OLD messages from system after X days**

The system deletes old messages from mailboxes belonging to this class of service after the number of days you specify in this field. An old message is one the mailbox owner has listened to, but has not yet deleted.

If you enter *0* in this field, an old message is deleted at midnight on the day the message became old. If you enter *1* in this field, an old message is deleted at midnight on the day following the day the message became old.

To disable deletion of old messages, enter *99* in this field. However, do this with caution, since accumulating messages may create disk storage problems.

- The default setting is 30.

**Automatically delete NEW messages from system after X days**

The system deletes new messages from mailboxes belonging to this class of service after the number of days you specify in this field. A new message is one the mailbox owner has not yet listened to.

If you enter *0* in this field, a new message is deleted at midnight on the day the message was received. If you enter *1* in this field, a new message is deleted at midnight on the day following the day the message was received.

**CAUTION**

- *Use this field with caution. Improper use may cause important messages to be lost.*
- *To disable the deletion of new messages, retain the default setting of 99 in this field.*
- *If you enter a number other than 99 in this field, remember that messages are deleted whether or not the mailbox owner has listened to them.*

*Using Class of Service Settings (continued on next page)*

*Using Class of Service Settings (continued)*

**CONTROLLING GREETINGS**

You can use these settings control how many greetings are allowed for a particular class of service.

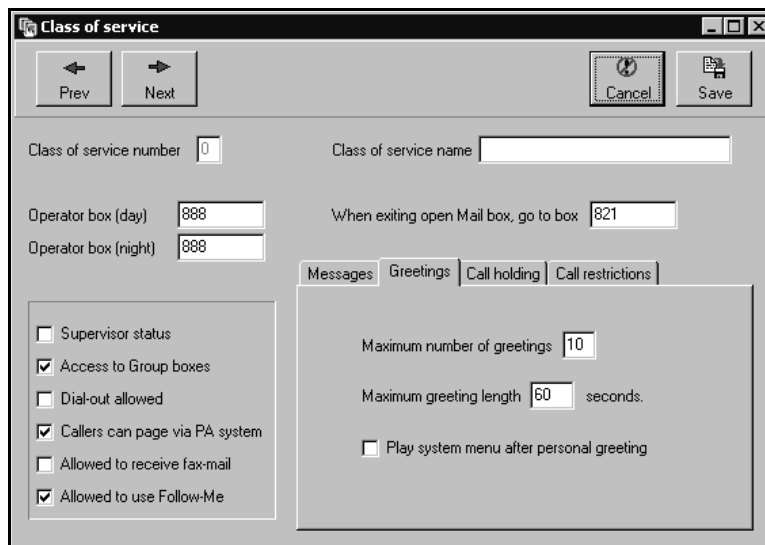
**From the Class of Service screen (see page 82):**

- 1) Click on the Greetings tab (see below) to display the available greetings settings.
- 2) Set options as appropriate (see field and option descriptions below).

**What's on the Greetings Tab?**

A mailbox can have up to 10 pre-recorded personal greetings. The mailbox owner may record these greetings, store them in the mailbox, and choose the greeting that is to be active at any specific time.

The following is a listing of descriptions for each field and option on the Greetings tab.



*What's on the Greetings Tab? (continued on next page)*

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*What's on the Greetings Tab? (continued)***Maximum number of greetings**

You may want to offer use of all 10 greetings to users, or you may want to restrict them to fewer greetings. Use this field to define how many personal greetings users with this class of service should be allowed to record.

If you set the field to 0, callers who route to a mailbox belonging to this class of service always hear the pre-recorded system prompt, *"That extension is not available..."*.

- The default setting is 1.

**NOTE**

*In class of service 7, this field must be set to allow at least 2 greetings. Class of service 7 is assigned to mailbox 70, the supervisor mailbox that by default controls the routing boxes on the system.*

*Because you usually set up routing boxes with at least 2 greetings, this parameter must be set to at least 2 in the supervisor mailbox class of service.*

**Maximum greeting length**

When a mailbox owner calls in to re-record his/her personal greeting, the system limits the length of the new greeting to the value you enter in this field.

- The default setting is 60.

**Play system menu again after personal greeting**

If an extension is busy or does not answer, the system plays the mailbox owner's personal greeting. After playing the greeting, it can announce the options available to the caller (for example, *"If you would like to leave a message, press 1. To try another extension, press 3, or to speak with an operator, press 0."*).

If the mailbox owners do not record these options as part of their greetings, enable this option so that the system plays the menu. If you want to allow your mailbox owners to decide which options to offer, do not check this field and instruct them to include the options in their personal greetings.

- The default setting for this setting is disable (off).

*Using Class of Service Settings (continued on next page)*

*Using Class of Service Settings (continued)*

**CONTROLLING CALL HOLDS**

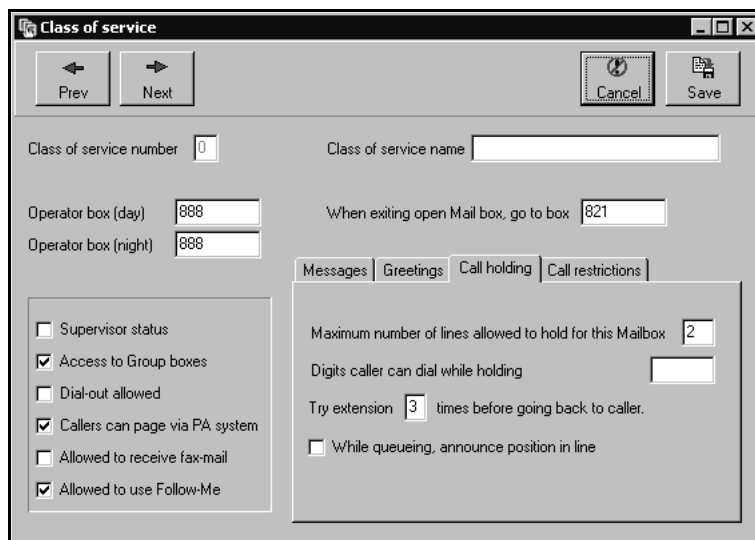
You can use these settings control make settings for calls on hold for a particular class of service.

**From the Class of Service screen (see page 82):**

- 1) Click on the Greetings tab (see below) to display the available greetings settings.
- 2) Set options as appropriate (see field and option descriptions below).

**What's on the Call Holding Tab?**

The following is a listing of descriptions for each field and option on the Call Holding tab.



*What's on the Call Holding Tab? (continued on next page)*

*What's on the Call Holding Tab? (continued)***Maximum number of lines allowed to hold for this Mailbox**

You can use this field to limit the number of lines that can simultaneously hold for a mailbox belonging to this class of service.

**EXAMPLE**

*If you set the field to 3, and lines 1, 3, and 6 are holding for a mailbox, subsequent callers are not offered the option to hold.*

*Instead, they hear the personal greeting recorded for the box, so they can leave a message, try another extension, etc.*

**NOTE**

*If you want to disable the call queuing feature for the class of service, set this field to 0.*

- The default setting is 2.

**Digits caller can dial while holding**

While callers are in the queue holding for an extension, they can press a digit to leave the queue and process the call differently. By default, the options open to the caller are the same as those available when the caller hears the personal greeting (*"If you would like to leave a message, press 1. To try another extension, press 3, or to speak with an operator, press 0."*).

If you want to restrict the caller to fewer choices while in the queue, use this field to specify which digits are allowed. All other digits are ignored by the system while the caller is in the queue.

**EXAMPLE**

*If you enter 13 in this field, the only options available to the caller are:*

- *Press 1 To leave a message*
- *Press 3 To try another extension*

**Try extension X times before going back to caller**

The entry in this field applies only if the Max lines allowed to hold field is greater than 0. If the caller chooses to hold, the system plays a series of hold prompts to the caller (these are typically music or commercials).

At the end of each hold prompt, the system tries the extension again. If it is busy, the system plays the next hold prompt to the caller.

*Try extension X times before going back to caller (continued on next page)*

*Try extension X times before going back to caller (continued)*

After the defined number of hold prompts have been played, the system goes back to the caller and offers the options to remain on hold, try another extension etc. This field allows you to specify the number of hold prompts that should be played before the system offers these options to the caller.

Interchange is shipped with only one hold prompt recorded. Therefore, if you enter 3 in this field, a caller queued to a busy station hears this same prompt three times before being offered the options again.

If you record the second hold prompt (147), the caller hears prompt 146, 147, 146 again before being offered the options. You may record up to 100 different hold prompts, which are played in sequence.

Remember, at the end of *each* hold prompt, the system tries the extension again). After the system plays the highest number hold prompt recorded, it returns to the lowest number after the next try. The default setting is 3.

**NOTE**

*The time between tries to a busy extension is determined by the length of each hold prompt recorded. The prompt supplied with the system (prompt 146) is approximately 30 seconds.*

**While in queue announce position in line**

While callers are in the queue and holding for an extension, Interchange can keep them informed on the progress of their call.

- If you check this field, Interchange announces to the caller:  
*"That extension is still busy. You are number [#] in line. If you would prefer to leave a message, press 1, or to speak with an operator, press 0."*
- If you do not check this field, the system says:  
*"That extension is still busy. If you would prefer to leave a message, press 1, or to speak with an operator, press 0."*
- The default setting for this option is disabled (off).

*Using Class of Service Settings (continued on next page)*

*Using Class of Service Settings (continued)***RESTRICTING CALLS**

When mailbox owners call in to change their call-transfer number, follow-me numbers, pager number, or message notification number, you may want to prevent them from changing it to certain numbers, such as long-distance numbers.

You can use these settings to restrict calls for a particular class of service.

**From the Class of Service screen (see page 82):**

- 1) Click on the Call Restrictions tab (see below) to display the available call restriction settings.
- 2) Set options as appropriate (see field and option descriptions below).

**What's on the Call Restrictions Tab?**

The following is a listing of descriptions for each field and option on the Call Restrictions tab.

The screenshot shows a window titled "Class of service" with a "Call restrictions" tab selected. The window contains the following fields and options:

- Class of service number: 0
- Class of service name: [text field]
- Operator box (day): 888
- Operator box (night): 888
- When exiting open Mail box, go to box: 821
- Messages | Greetings | Call holding | Call restrictions (selected)
- Supervisor status:
- Access to Group boxes:
- Dial-out allowed:
- Callers can page via PA system:
- Allowed to receive fax-mail:
- Allowed to use Follow-Me:
- Mailbox owner cannot transfer to numbers which begin with these digits:
  - [text field] [text field]
  - [text field] [text field]
  - [text field] [text field]

*What's on the Call Restrictions Tab? (continued on next page)*

*What's on the Call Restrictions Tab? (continued)***Mailbox owner cannot transfer to numbers which begin with these digits**

This fields allow you to define digit sequences that Interchange blocks on system-generated outgoing calls. Interchange looks at each of these digits fields to determine if any of them match the number entered by the mailbox owner.

If the number entered by the caller begins with the digits specified in the digits field, the system defines the number entered as a match.

**EXAMPLE**

*If you enter the digits 1900 in one of the Digits fields, the system considers the telephone numbers 1-900-555-1212, 1-900-123-4567, 1-900-111-2222 to be matches. Telephone number 1-901-555-1212 would not be considered a match.*

If you enter the digit 0 in one of the Digits fields, the system considers all numbers beginning with 0 to be matches. This would include calls to the operator (0), calls to the long-distance operator (00), international calls (011), and any operator-assisted call (0 followed by telephone number).

If the mailbox owner enters a number that matches one of the digit strings you enter here, Interchange informs the owner that the number is not acceptable and does not allow the owner to change the existing call transfer setup.

These blocking digits are used to block Interchange from making automated calls; they do not block the mailbox owner from dialing the numbers directly from their own extensions.

**EXAMPLE**

*A mailbox owner can dial 911 from their extension and complete the call, even though you have entered 911 here in a digits field. The block here keeps Interchange from dialing 911 (e.g., mailbox owners have listed 911 in their call transfer field, as a follow-me number, as a pager number, etc.*

**IMPORTANT!**

*The 911 block is delivered with the system as a default. It is highly recommended that you keep this 911 block to avoid your voice mail system calling an emergency line, and the fines that may result if this occurs.*

## Working with Group Boxes

Group distribution lists, which are defined in a group box, provide mailbox owners an easy way to send one message they record to multiple individuals, without specifying each individual recipient's extension.

Though mailbox owners can set up one to four personal distribution lists specific to their needs in their mailbox, many organizations also set up group distribution lists that can be used by all company employees.

A group list a company maintains may, for example, contain the mailbox numbers of all company employees, of all employees in a particular department, of all employees that work a specified shift, etc.

When mailbox owners want to send a message to a group box, they log into their mailbox, then select the option to send the message. At the prompt, *"Please enter the box number,"* the mailbox owner enters the number of the group box containing the mailboxes to which the message is to be sent.

### ACCESSING THE GROUP BOX SCREEN

**From the main menu of the main screen screen:**

- Go to *Boxes* ► *Group Box* to display the Group Box screen.
- *The screen opens to show the General tab options.*

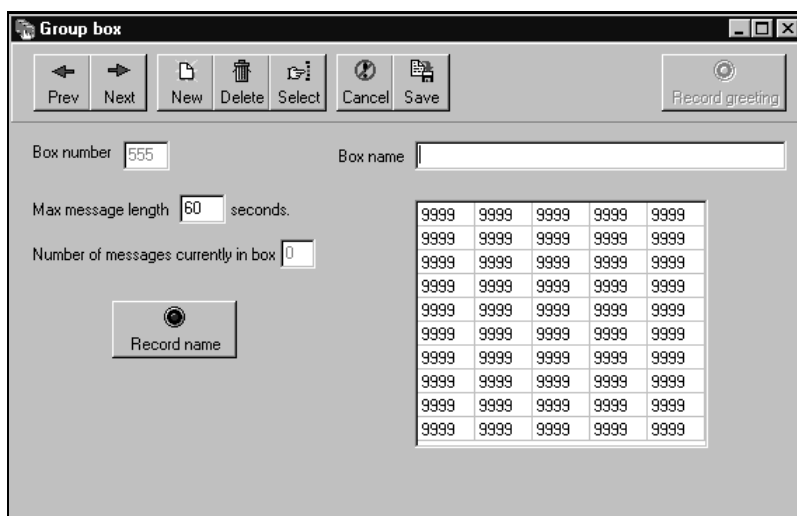
*Working with Group Boxes (continued on next page)*

*Working with Group Boxes (continued)*

**MAKING GENERAL GROUP BOX SETTINGS**

**What's on the Group Box Screen?**

The following is a listing of descriptions for each field, option, and button on the Group Box screen.



**Box number**

This field displays the group box number. A box number can be any number between 1 and 9899 (boxes 9900 - 9999 are reserved for the system). You cannot change the box number on the screen.

**Next & Prev**

You can use these buttons to display information for another box number.

**New**

Use this button to create a new group box (see "Creating, Changing, or Deleting a Group Box" on page 98).

*What's on the Group Box Screen? (continued on next page)*

**What's on the Group Box Screen? (continued)****Record name**

This button shows whether or not the name of the group box has been recorded. The system plays the name as soon as a caller elects to send a message to the group box.

Interchange signifies an existing recording by displaying a red light on the button.

**HINT**

See "Recording a Name for a Group Box" on page 99 for more information.

**Number of messages currently in box**

This field cannot be changed from the keyboard. It indicates the number of messages in the group box.

**Max message length X seconds**

Messages can be sent to and from a Group Box. However, you can limit the length of messages that are sent to this group box. To do so, enter the length (in seconds) in this field.

The member fields on the right side of the Group box menu show the current members of the group box.

**HINT**

See "Adding a Mailbox to a Group Box and "Sending Messages to Multiple Mailboxes" on page 100 for more information.

*Working with Group Boxes (continued on next page)*

*Working with Group Boxes (continued)*

**CREATING, CHANGING, OR DELETING A GROUP BOX**

**Creating a Group Box**

**From the Group Box screen (see page 95):**

- 1) Click on the *New* to display the group box number prompt.
- 2) Enter the number of the group box you want to create.
  - *The system displays the new group box.*

**Changing an Existing Group Box**

**From the Group Box screen (see page 95):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to make changes.
  - *The system then displays the specified box.*
- 3) Make changes as needed.



***HINT***

- *For further details on how to change the setups for a specific mailbox, see "What's on the Group Box Screen?" on page 96*
  - *You can also use the system's help file at any time by pressing F1.*
- 4) Click *Save* to store the changes.

*Creating, Changing, or Deleting a Group Box (continued on next page)*

***Creating, Changing, or Deleting a Group Box (continued)*****Deleting a Mailbox****From the Group Box screen (see page 95):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box you want to delete.
  - *The system then displays the specified box.*
- 3) Make sure that the currently displayed box is the one you want to delete.
- 4) Click Delete to display a prompt asking you to confirm that you want to delete the designated box.
- 5) Click Yes to delete the specified box.

**OR**

- 6) Click No to cancel the deletion

**ADDITIONAL GROUP BOX SETTINGS****Recording a Name for a Group Box****From the Group Box screen (see page 95):**

You can use the Record Name button on the Group Box screen (see page 97) to record a name for the group box.

- 1) Click Record Name to display a recording dialog box.
- 2) Click on button with the circle to begin recording.
- 3) Click on the rectangle button (to the left of the circle button) to end the recording.

**Adding a Mailbox to a Group Box**

A group box can contain up to 50 mailboxes.

**From the Group Box screen (see page 95):**

Enter a mailbox number to the table shown on the Group Box screen to add it to the specified group box.

*Additional Group Box Settings (continued on next page)*

*Additional Group Box Settings (continued)*

**Adding a Mailbox to a Group Box**

A group box can contain up to 50 mailboxes.

**From the Group Box screen (see page 95):**

- 1) Move the cursor to the mailbox number to be deleted.
- 2) Press the delete key on your keyboard to delete the number.

**Sending Messages to Multiple Mailboxes**

To send messages to groups containing more than 50 mailboxes, use one of the following methods:

- **Use the Send to Multiple Mailboxes option** - to send the message to additional group boxes. After selecting the first group box and recording the message, press the # key for more options. From the menu that plays, choose option 6 to send the message to several mailboxes or group boxes.

**Connect a group box to a text file** - which can contain an unlimited number of members. Create a text file in the c:\vm\ directory with the name GboxXXXXXXXXX.LST, where xxxxxxxxx is the number of an existing group box.



**NOTE**

*that if the existing group box number is less than nine digits, you must include leading zeros before the mailbox number in this filename.*



**EXAMPLE**

*To create an extended member file for group box 601, create a text file named Gbox000000601.LST and list each additional mailbox on a separate line in the file (do not duplicate members in the group box screen and the text file).*

## Changing Company Business Hours

Interchange allows you to set up or change the business hours your company uses, including Day Service and Lunch Service. By default, any period not defined as part of Day Service or Lunch Service is considered part of Night Service mode.

The system automatically switches between Day Service, Night Service, and Lunch Service based on the times you enter in these fields.

**HINT**

See *Understanding Supervisor Responsibilities* on page 5 for more information on how the system uses service modes and the hours you designate.

**From the main menu of the main screen:**

Go to *System* ► *Business Hours* to display the Business Hours screen.

	Day service begins	Day service ends	Lunch service begins	Lunch service ends
Sunday	0:00	0:00	0:00	0:00
Monday	0:00	0:00	0:00	0:00
Tuesday	0:00	0:00	0:00	0:00
Wednesday	0:00	0:00	0:00	0:00
Thursday	0:00	0:00	0:00	0:00
Friday	0:00	0:00	0:00	0:00
Saturday	0:00	0:00	0:00	0:00

*Changing Company Business Hours (continued on next page)*

*Changing Company Business Hours (continued)*

- 1) Enter the opening and closing times for the business for each day of the week into the appropriate fields (i.e, **Day service begins** and **Day service ends** fields).



**HINT**

- *All times must be entered in 24-hour format—for example, enter 8:00 PM as 20:00).*
  - *If the business is closed all day, enter 00:00 in both the Day service begins and Day service ends fields. This places the system in the Night Service mode for that entire day.*
  - *If your business is open 24 hours on a particular day, enter 00:00 for the Day service begins and 24:00 for Day service ends times.*
- 2) Click Save to store the changes.

## Changing Company Holidays

In addition to answering calls differently during different times of day, Interchange can answer calls in a special way during various holidays.



### EXAMPLE

*On New Year's day, your company may be working with a smaller staff, so you may want the system to greet customers with:*

*"The XYZ Company wishes all its customers a Happy New Year. Our service personnel are not available today, but will be back as usual tomorrow. For Sales, press 1, or press 0 to speak to an operator."*

You can pre-define up to 20 holiday dates. For each holiday, you can specify a different routing box to which calls will be sent. During the holiday, Interchange uses the greeting and call routing scheme you have defined in that routing box.

### From the main menu of the main screen:

- 1) Go to *System* ► *Holiday Schedule* to display the Business Hours screen.

Holidays				
1.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
2.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
3.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
4.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
5.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
6.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
7.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
8.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
9.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
10.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
11.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
12.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
13.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>
14.	On	<input type="text"/>	<input type="checkbox"/>	answer calls by routing to box <input type="text"/>

*Changing Company Holidays (continued on next page)*

*Changing Company Holidays (continued)*

- 2) Modify the company holidays on the Holiday Schedule screen.



**NOTE**

*Holiday greetings are in effect for the entire 24-hour period of the calendar day.*

- 3) Click on the Save button to save your changes.



**EXAMPLES**

*The following example shows how to set up a New Year's holiday greeting to play on January 1.*

- A) *Access the Holiday Schedule screen and select January as the month, then enter 1 to indicate the first day of the month.*
- B) *In the Initial box field, enter a spare box number. In this example, box number 8500 is used.*
- C) *Interchange is now advised of the New Year's holiday. Each time a call arrives on January 1, the system routes the call to box 8500.*
- D) *To complete this example, you must create routing box 8500. You add routing boxes by accessing the Routing Box screen. Click on Add and type 8500 in the window that displays.*
- E) *Once you create a routing box, you can record a greeting in it (in this example, a New Year's specific holiday greeting) and set up the various routing options as described in *Changing the Routing in a Routing Box*.*

## Making Changes to the Routing Box

You can easily make changes to the Routing box features (e.g., routing, greetings, etc.) as described below and on the following pages).

### ACCESSING THE ROUTING BOX SCREEN

Go to *Boxes* ► *Routing Box* to display the Routing Box screen (see page 110)

### What's on the Routing Box Screen?

The following is a listing of descriptions for each field, option, and button on the Routing Box screen.

The screenshot shows the 'Routing box' window with the following fields and options:

- Buttons:** Prev, Next, New, Delete, Select, Cancel, Save, Record greeting.
- Box number:** 800
- Box name:** Main Greeting
- Owner:** 70
- Play greeting:** 1 times, then wait 4 seconds for a digit.
- If digit received, wait for more digits before routing call
- Route call based on:**
  - Digit dialed
  - Call sequence number
  - Day of week
  - Date
  - Time of day
  - Database lookup
  - Day / Night service
- Destination for dialed digits:**

Digit 1	9999	Digit 5	9999	Digit 9	800
Digit 2	9999	Digit 6	9999	Digit 0	888
Digit 3	9999	Digit 7	9999	Digit *	9998
Digit 4	9999	Digit 8	3002	Digit #	9992
- Voice:** 9999
- If no digit dialed:** Go to box... 888
- If invalid digit dialed, go to box:** 800

#### Box number

This field displays the routing box number. A box number can be any number between 1 and 999999999 (boxes in the range 9970 - 9999 and 0 are reserved for the system). You cannot change the box number field.

*What's on the Routing Box Screen? (continued on next page)*

*What's on the Routing Box Screen? (continued)*

**Next & Prev**

You can use these buttons to display information for another box number.

**Box name**

This field contains the name assigned to the routing box. The name appears on the database listing and is used for record keeping.

If you want the system to announce the current time after it plays the routing box greeting, insert the word *Time* inside brackets before the box name (for example, if the box name is New Products, change it to [Time] New Products).

If you want the system to play the current date, insert [Date] before the box name. A single routing box can play the time or the date, but not both.

By connecting two routing boxes together, however, you can play both the time and the date to the caller.

Ask your Interchange System Technician if you would like more information on how to do this.

**Owner**

This field contains the mailbox number of the owner of the routing box. The owner has the ability to call in to the system to re-record the routing box greeting or select a different active greeting.

If you do not want to provide this remote administration option, or if not more than one greeting is required for the routing box, leave this field blank.

**Play greeting X times**

While Interchange is playing the greeting for the routing box, it also listens for the caller to enter a digit.

If the system gets to the end of the greeting without detecting a digit from the caller, it waits the amount of time specified in the *wait X seconds for a digit* field (see below).

If no digits are detected before this time has elapsed, the system repeats the routing box greeting the number of times specified in this field.

**wait x seconds for a digit**

In this field, enter the number of seconds you want Interchange to wait to detect the first digit from the caller. Once the system receives the first digit, it either waits for additional digits or immediately routes the call based on the other fields in the routing box.

*What's on the Routing Box Screen? (continued on next page)*

*What's on the Routing Box Screen? (continued)***If digit received, wait for more digits before routing call**

If the caller dials a digit, the system checks this field:

- If this field is not checked, the system immediately attempts to route the call based on the single digit dialed.
- If the *Destination for dialed digit field* contains a valid box number, the call is immediately sent to the new box. This means that menu selections take priority over extension numbers.

**EXAMPLE**

*If the destination for digit 1 is a valid box, the caller cannot dial mailboxes beginning with a 1, as the system routes the call as soon as it receives the first 1 in the extension number).*

- If this field is checked, the system waits to see if the caller is dialing a sequence of digits (for example, entering a box number).
- If the system detects additional digits, and they correspond to a valid mailbox, routing box, etc., it routes the call to that box.
- If the system detects only one digit, it consults the *Destination for dialed digits* fields and routes the call to the box specified. Since the system must wait for additional digits, call routing is not executed as quickly as when this field is unchecked.

*What's on the Routing Box Screen? (continued on next page)*

*What's on the Routing Box Screen? (continued)***Route call based on**

This area allows you to specify how you want Interchange to route a call to this box. The fields on the right side of the menu will change, based on what you select in the left side of the menu.

There are seven techniques you can use to route calls based on the:

- Digit(s) dialed by the caller
- Call's sequence number (first call goes to box [number], second call goes to box [number], etc.)
- Day-of-week (Sunday, Monday, etc.) the call is received
- Date that the call is received
- Time of day the call is received
- Results of a database lookup
- Based on whether the system is in Day Service, Lunch Service, or Night Service or whether the call is received on a defined holiday.

**CHANGING THE ROUTING IN A ROUTING BOX**

Interchange uses routing boxes to send (route) calls to boxes throughout the system. Typically, routing boxes are set up to play an announcement (greeting) to callers that prompts them to select a single-digit choice from a list of options.

**EXAMPLE**

*"You have reached our service department. If you are calling to inquire about the status of a repair, please press 1. For all other inquiries, please press 2. If you need assistance, please press 3."*

When a system set up this way, a call is transferred to a certain mailbox when the caller presses 2 during or after the greeting. You can control the digit(s) callers can dial and the route their calls will subsequently take.

*Changing the Routing in a Routing Box (continued on next page)*

**Changing the Routing in a Routing Box (continued)**

Interchange can also route calls based on certain criteria, such as the time of day or day of week on which the call is received, the order in which the call is received, etc.

**IMPORTANT!**

- *Use caution when changing the routing boxes set up on your system by your Interchange System Technician.*
- *If you have any questions, contact that technician prior to making changes.*
- *If you DO change the call routing set up, you must update the routing box greeting to relay new instructions to the caller. See "Changing a Routing Box Greeting" on page 110 for further details.*

**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to make changes.
  - *The system then displays the specified box.*
- 3) Make changes as needed (see "What's on the Routing Box Screen?" on page 105).

*Making Changes to the Routing Box (continued on next page)*

*Making Changes to the Routing Box (continued)*

### CHANGING A ROUTING BOX GREETING

A Routing Box greeting is played as soon as a caller is routed to the routing box. Once the system has finished playing the greeting, it may optionally play the time or date, depending on the contents of the *Box Name* field.

Before modifying any routing box greetings, refer to “*Changing the Greeting Played by a Routing Box*” on page 7 and “*Changing the Routing in a Routing Box*” on page 8 for information on the routing box setups on the system and routing box greetings.



**NOTE**

*If you use the following procedure to change the greeting in a routing box, you must update the routing box call routing structure to relay new instructions to the caller.*

*See “Changing the Routing in a Routing Box” on page 108 for more details.*

**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to change the greeting.
  - *The system then displays the specified box.*
- 3) Make changes as needed using the *Record Name* button.



**HINT**

*See “Recording a Name for a Group Box” on page 99 for information about recording a greeting. The same method used for recording for a group box is the same as for a routing box, except that you **MUST** do it from the *Routing Box* screen.*

*Changing a Routing Box Greeting (continued on next page)*

**Changing a Routing Box Greeting (continued)**

- 4) Click **Save** to store your changes.

**NOTE**

- The greeting can also be recorded remotely by the owner of the routing box.
- Once a routing box has been assigned an owner, the routing box is allowed the same number of greetings as the owner mailbox, as defined in the mailbox's assigned class of service.

**ROUTING CALLS BASED ON DIGITS DIALED****From the Routing Box screen (see page 105):**

- 1) Click on the **Select** to display a drop down list.
- 2) Select the box number for the box to which you want to base calls on digits dialed.
  - The system then displays the specified box.
- 3) Click on the **Digit Dialed** option (if it is not enabled).
  - When you select the **Digits dialed** field, Interchange displays the related field on the right of the menu.
  - Make Changes to settings as needed.

Routing box

Prev Next New Delete Select Cancel Save Record greeting

Box number: 831 Box name: Sample Routing Box

Owner: 70

Play greeting 1 times, then wait 3 seconds for a digit.

If digit received, wait for more digits before routing call

Route call based on:

- Digit dialed
- Call sequence number
- Day of week
- Date
- Time of day
- Database lookup
- Day / Night service

Destination for dialed digits

Digit 1	1000	Digit 5	9999	Digit 9	9999
Digit 2	2000	Digit 6	9999	Digit 0	9999
Digit 3	1234	Digit 7	9999	Digit *	9999
Digit 4	9999	Digit 8	9999	Digit #	9999

Voice: 9999

If no digit dialed: Say "Goodbye" 9999

If invalid digit dialed, go to box: 831

*Routing Calls Based On Digits Dialed (continued on next page)*

*Routing Calls Based On Digits Dialed (continued)*

If you select this field, callers can press a key at any time to make a selection from the menu (or they can dial a mailbox directly) while the system is playing the routing box greeting.

When the caller presses a key, Interchange immediately stops playing the greeting and processes the dialed digit.

If the caller does not dial a digit and the system reaches the end of the greeting, it pauses to wait for a response.

If the system does not detect a response (DTMF or spoken word), the system performs whatever action is specified in the *If no digit dialed* field.

While the system is playing the routing box greeting, the caller can press a key at any time to make a selection.

When the caller presses a key, the system immediately stops playing the greeting and consults the *Destination for dialed digits* fields to see where the call is to be routed.

**IMPORTANT!**

- *Traditionally, Interchange uses the # key to allow mailbox owners to access the voice mail gateway (box 9992).*
- *Therefore, it is strongly recommends you program destination for dialed digit # as 9992 in every routing box so mailbox owners can access the gateway at any time.*
- *Although you may program any other digit as the voice mail gateway, all user documentation is written based upon using the # key.*

*Routing Calls Based On Digits Dialed (continued on next page)*

*Routing Calls Based On Digits Dialed (continued)***If no digit dialed**

This field, located just underneath the *Destination for dialed digits* fields, allows you to tell Interchange what action to take if the caller does not enter any digits within the allotted amount of time. Available options include the following.

IF NO DIGIT DIALED OPTIONS	
Option	Result
Go to box	Routes the call to another box. Enter the new box number in the next field.
Say goodbye	Says, "Good-bye" and then hangs up
Return	Goes back to the previous box that handled this call (usually a routing box).
Hang up	Interchange immediately terminates the call by going on hook.

**NOTE**

*The absence of a digit may mean that the caller has hung up.*

**CAUTION**

- *If your telephone system does not offer consistent and reliable disconnect supervision, do not instruct Interchange to go back to this same box if no digits are dialed; otherwise it might stay in this box continually and not disconnect the call.*
- *Contact your Interchange System Technician if you have any questions.*

*Making Changes to the Routing Box (continued on next page)*

*Making Changes to the Routing Box (continued)*

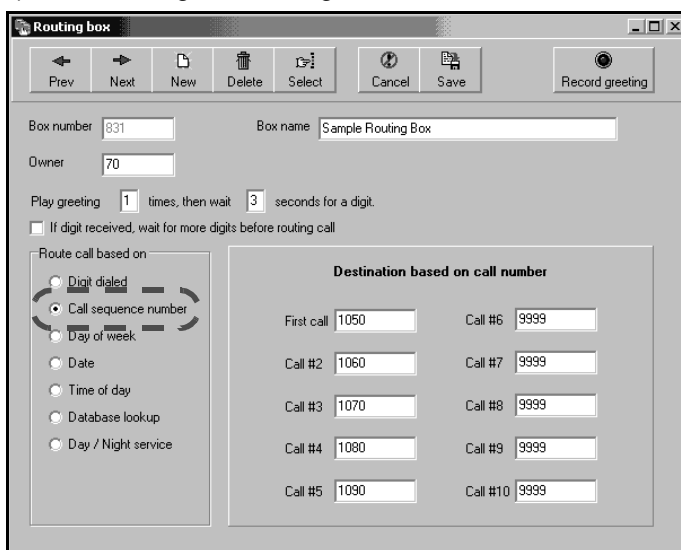
**ROUTING CALLS BASED ON CALL SEQUENCE NUMBER**

If you select this option on the Routing box menu, Interchange begins by playing the routing box greeting. Once the greeting ends, the system immediately routes the call to the box specified in one of the *Destination based on call number* fields, in numerical order.

If the caller dials any digit while the routing box greeting is playing, Interchange stops the greeting and routes the call according to how you have set up these fields.

**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to base calls on a call sequence number.
  - *The system then displays the specified box.*
- 3) Click on the *Call sequence* option (if it is not enabled).
  - *When you select the Call sequence number field, Interchange displays the related field on the right of the menu.*
- 4) Make Changes to settings as needed.



*Routing Calls Based On Call Sequence Number (continued on next page)*

*Routing Calls Based On Call Sequence Number (continued)*

Call Number	Box to Which Call is Routed
First call to this box	Box specified in the <b>First call</b> field.
Second call to this box	Box specified in the <b>Call #2</b> field.
Third call to this box	Box specified in the <b>Call #3</b> field.
Fourth call to this box	Box specified in the <b>Call #4</b> field.
Fifth call to this box	Box specified in the <b>Call #5</b> field.
Sixth call to this box	Box specified in the <b>Call #6</b> field.
etc.	etc.

**ROUTING CALLS BASED ON DAY OF WEEK**

If you select this option, the system plays the routing box greeting. Once the greeting ends, the system immediately routes the call to the box specified in the Destination for each day fields that corresponds to the day of the week.

If the caller dials any digit while the routing box greeting is playing, Interchange stops the greeting and routes the call according to how you have set up these fields.

**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to base calls on a day of the week.
  - *The system then displays the specified box.*

*Routing Calls Based On Day of Week (continued on next page)*

*Routing Calls Based On Day of Week (continued)*

- 3) Click on the *Day of the week* option (if it is not enabled).
  - *When you select the Day of Week field, Interchange displays the related field on the right of the menu.*
- 4) Make Changes to settings as needed.

Day Call Received	Box to Which Call is Routed
Sunday	Box specified in the <b>Sunday</b> field.
Monday	Box specified in the <b>Monday</b> field.
Tuesday	Box specified in the <b>Tuesday</b> field.
Wednesday	Box specified in the <b>Wednesday</b> field.
Thursday	Box specified in the <b>Thursday</b> field.
Friday	Box specified in the <b>Friday</b> field.
Saturday	Box specified in the <b>Saturday</b> field.

*Making Changes to the Routing Box (continued on next page)*

*Making Changes to the Routing Box (continued)***ROUTING CALLS BASED ON DATE**

If you select this option, the system begins by playing the routing box greeting.

**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to base calls on the date.
  - *The system then displays the specified box.*
- 3) Click on the *Date* option (if it is not enabled).
  - *When you select the Date field, Interchange displays the related field on the right of the menu.*
- 4) Make Changes to settings as needed (see field descriptions on next page).

Starting on this date	Ending on this date	Go to box	Treat as
1- 1-2003	2-1-2003	1000	Day Service
2- 1-2003	3- 1-2003	2000	Day Service
3- 1-2003	4- 1-2003	3000	Day Service
4- 1-2003	5- 1-2003	4000	Day Service
5- 1-2003	6- 1-2003	5000	Day Service
6- 1-2003	12-31-2003	6000	Day Service

*Routing Calls Based on the Date (continued on next page)*

*Routing Calls Based on the Date (continued)*

**Go to box**

Once the greeting ends, the system immediately routes the call to the box specified in this field that corresponds with the date range during which the call has been received.

**Starting on this date**

**Ending on this date**

You can specify up to six date ranges in these fields.

**Treat as**

You also specify the box to which calls should be routed for each date range, and whether each date range should be treated as Day Service, Night Service, Lunch Service, or Holiday Service in this field.

If you select the default *No Change* in the *Treat As* field, the system's service mode will be determined by those defined on the *Business Hours* screen.)

**Otherwise, outside these dates - go to box X**

You can also specify a box to which calls should be routed if they are received during a date range that is not specified in this field.

**ROUTING CALLS BASED ON TIME OF DAY**

If you select this option, the system begins by playing the routing box greeting.

**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to base calls on the time of day.
  - *The system then displays the specified box.*

*Routing Calls Based Time of Day (continued on next page)*

*Routing Calls Based On Time of Day (continued)*

- 3) Click on the *Time of Day* option (if it is not enabled).
- When you select the *Time of Day* field, Interchange displays the related field on the right of the menu.

Routing box

Prev Next New Delete Select Cancel Save Record greeting

Box number 831 Box name Sample Routing Box

Owner 70

Play greeting 1 times, then wait 3 seconds for a digit.

If digit received, wait for more digits before routing call

Route call based on

- Digit dialed
- Call sequence number
- Day of week
- Date
- Time of day
- Database lookup
- Day / Night service

Destination based on time of day

From	until	go to box	Treat as
8:00	9:00	1000	Day Service
9:00	10:00	2000	Day Service
10:00	11:00	3000	Day Service
11:00	12:00	4000	Day Service
12:00	14:00	5000	Day Service
14:00	17:30	6000	Day Service

Otherwise, outside these times - go to box 841

**go to box**

Once the greeting ends, the system immediately routes the call to the box specified in this field that corresponds with the span of time during which the call has been received.

**From  
until**

You can use these fields to specify up to six time spans.

*Routing Calls Based Time of Day (continued on next page)*

*Routing Calls Based On Time of Day (continued)*

**Treat as**

Use this field to specify the box to which calls should be routed for each time span, and whether each time span should be treated as Day Service, Night Service, Lunch Service, or Holiday Service



**NOTE**

*If you select the default No Change in the Treat As field, the system's service mode will be determined by those defined on the Business Hours screen.*

**Otherwise, outside these times - go to box X**

You can specify a box to which calls should be routed if they are received during a time span that is not specified in this field.

**ROUTING CALLS BASED ON DATABASE LOOKUP**

Interchange accepts up to 20 digits from the caller and uses these to look up a specified database entry (see "Database filename" on page 121).

**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to base calls on a designated database lookup.
  - *The system then displays the specified box.*

*Routing Calls Based on Database Lookup (continued on next page)*

*Routing Calls Based On Database Lookup (continued)*

- 3) Click on the *Database lookup* option (if it is not enabled).
- When you select the *Database lookup* field, Interchange displays the related field on the right of the menu.

The screenshot shows the 'Routing box' configuration window. The 'Route call based on' section has the 'Database lookup' option selected and circled in red. The 'Destination based on database lookup' section shows a dropdown menu set to 'Say "Goodbye"' and a text field containing '9999'. Below this is a 'Database filename' field containing 'Sample' and a 'Review file' button.

**Database filename**

The system uses digits (up to 20) entered by the caller to look up a the database entry file name entered in this field. The system converts these digits to a box number, based on the contents of the database. The system then routes the call to that box.

*Routing Calls Based on Database Lookup (continued on next page)*

*Routing Calls Based On Database Lookup (continued)*

**If no digit dialed**

This field allows you to tell the system what action to take if the caller does not enter any digits within the allotted amount of time. Available options include the following.

IF NOT DIGIT DIALED OPTIONS	
Option	Action System Takes
Go to box	Routes the call to another box. Enter the new box number in the next field.
Say goodbye	Says, "Good-bye" and then hangs up
Return	Goes back to the previous box that handled this call (usually a routing box).
Hang up	Interchange immediately terminates the call by going on hook.



**HINT**

*For more information on routing calls based on database lookup, contact your Interchange system technician.*

**ROUTING CALLS BASED ON DAY/NIGHT SERVICE**

If you select this option, Interchange begins by playing the routing box greeting.

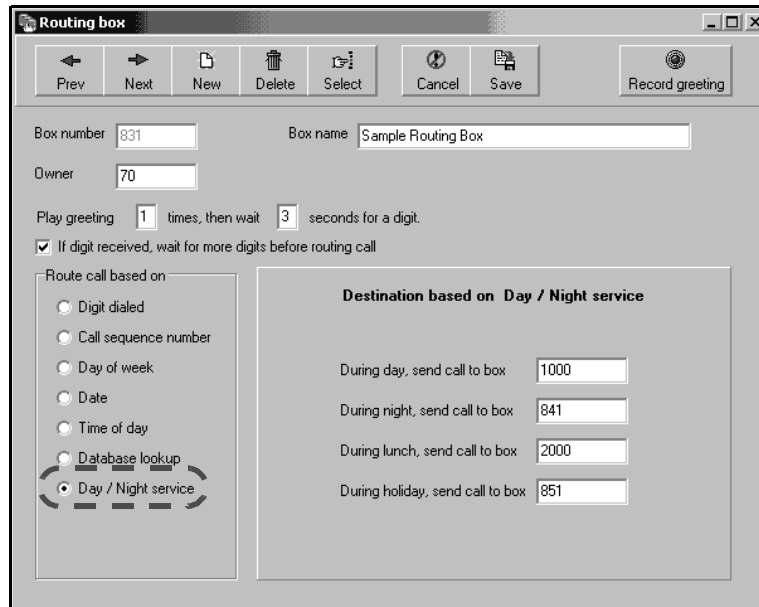
**From the Routing Box screen (see page 105):**

- 1) Click on the *Select* to display a drop down list.
- 2) Select the box number for the box to which you want to base calls on day/night service.
  - *The system then displays the specified box.*

*Routing Calls Based Time of Day (continued on next page)*

**Routing Calls Based On Time of Day (continued)**

- 3) Click on the *Day/Night service* option (if it is not enabled).
- When you select the *Day/Night service* field, Interchange displays the related field on the right of the menu.

**Destination based on Day / Night service**

Once the greeting ends, the system immediately routes the call to the box specified in one of these fields, based on the system's current service mode.

If the caller dials any digit while the routing box greeting is playing, Interchange stops the greeting and routes the call according to how you have set up these fields.

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## SYSTEM REPORTS

Interchange includes an extensive reports package that allows system administrators to generate reports and view them on any PC installed with Microsoft Excel.



**NOTE**

*Microsoft Excel is not included with Interchange.*

The reports package software is automatically included during the Interchange installation on the system PC. If Microsoft Excel is also installed on the system PC, you can both generate reports and view reports on the Interchange system PC.

In addition, you can view reports on a networked client PC, whether or not Excel is installed on the system PC. To do so, however, the Interchange system installation technician must install the reports package client software on the client PC. Contact your Interchange system technician for details.



**IMPORTANT!**

*To show reports effectively, client computers must be Pentium 166 PCs or better with at least 32 MB RAM. Set monitor resolution to a minimum of 800 x 600 for best viewing.*

### Generating Reports

- Each night, Interchange automatically compiles system report data in a Microsoft Access database file named DBREPORT.MDB. This file stores data for each day, up to one year.
- In the first week of January each year, the system renames the DBREPORT.MDB file to DBREPORT.[YEAR].MDB (where [year] is the four-digit year such as 2003).
- The system then clears the DBREPORT.MDB file and begins tabulating the current year's data.

## Accessing Reports

You can select to view reports from client PCs where both the reports package client software and Microsoft Excel have been installed, or from the Interchange system PC if Microsoft Excel is also installed on the PC.

### VIEWING REPORTS

- 1) Click on the Start button.
- 2) Go to Programs ► Voice Processing System ► Reporting Features ► View CS Reports.



#### **NOTE**

- *When Excel opens the workbook, it prompts you to enable the macros within the file. Select the option to Enable Macros, otherwise data within the report cannot be tabulated.*
  - *No matter how you select to view reports, you are prompted to enter your System Administrator password before you can view the system information.*
- 3) Enter the Administrator password that was valid the last time the report data was compiled.
    - *Once you enter the password, Interchange reads the data in the Microsoft Access database file DBREPORT.MDB, and opens a Microsoft Excel workbook file containing several worksheets.*
    - *Each worksheet presents data for a specific report.*

## Setting Up Report Defaults

Enter the name of your company on the first page of the workbook.

- *This name will appear on all subsequent report worksheet pages on-screen, and on printed reports.*
- *The Started and Last Updated fields on the first page identify the dates for which report data is available. You cannot change these fields.*

### System Information

Under this heading on the first workbook page, the report identifies the number of ports on the system and the total length of messages that are currently stored, in hours and minutes.

This area also displays the amount of time free for additional voice and fax message storage. This figure helps you quickly identify if the system is low on available storage space.

### Defaults

Under this heading on the first workbook page, you can modify settings that determine the report time-frame information that will be included by default on report worksheets *the next time you select to view reports*.

Although you modify the *default* view settings on this page, you can modify the view settings on a report-by-report basis as many times as you like as you view specific report worksheets. You make these report-specific modifications using fields in the upper-right portion on the worksheet screens.

When you modify report time-frame settings on a particular screen, you must also select the *Update* button on the screen to re-draw it using the new settings you specified.

## Viewing and Working with Reports

You can sort specific data on report worksheets and print the entire workbook, or print specific report worksheets using standard Excel commands. You can also use the *Save As* command on the file menu to save the file to a drive or diskette.

**HINT**

*Refer to the Microsoft Excel documentation if you need additional information on saving files.*

Remember that while you view and work with the report, the system is reading the data in the workbook from the Access database file DBREPORT.MDB on the system PC.

If you use the *Save As* command to save the report under a different drive, directory, or filename, the workbook will no longer be reading the Access database file, so you cannot modify report time-frame dates and re-generate screens within the report.

When you close the Excel file, the system prompts you to save your changes. If you select the *Yes* option, Interchange saves the name you entered for the company and the default view settings you indicated on the first page of the workbook.

## Customizing Reports

Once you access the report workbook, you can customize the presentation of data in each report by changing options on the Reports Customization worksheet (see next page).

By changing information in the Revised column of this worksheet, you can adjust the presentation of dates and times in the report and the names assigned to fields on report worksheets.

*Customizing Reports (continued on next page)*

*Customizing Reports (continued)*

The Default column indicates the standard settings shipped with the Report Generation package.

## Report Customization Worksheet (EXAMPLE)

Default	Revised	Field	Worksheet
MM/dd/yyyy	MM/dd/yyyy	short date format	Workbook
MMMM d, yyyy	MMMM d, yyyy	medium date format	
ddd, MMMM d, yyyy	ddd, MMMM d, yyyy	long date format	
h:mm AM/PM	h:mm AM/PM	time format	Login Failure, Default Password, Hourly Report
as of	as of	date prefix	
from	from	start interval prefix	
to	to	end interval prefix	
Yes	Yes		
No	No		
Total	Total		
Average	Average		
on	on	Chart title date prefix	Charts
No items are currently found	No items are currently found		Empty tables
Confidential	Confidential	addition to page footer	Printer
Update	Update	Button captions	Buttons
Reports	Reports	Sheet name = Title	Reports sheet
Log Start Date	Log Start Date		
Last Updated	Last Updated		
System Information	System Information		

**CHANGING A FIELD NAME OR DATE/TIME PRESENTATION****On the Reports Customization Worksheet:**

- 1) Follow the instructions below to change the field name or date/time presentation on a particular worksheet
- 2) Scroll down the *Worksheet* column to locate the worksheet containing the field you want to change.
- 3) Look in the *Field* column to locate a reference to the field.
- 4) Enter the change you want to make in the *Revised* column.

*Changing a Field Name or Date/Time Presentation (continued on next page)*

*Changing a Field Name or Date/Time Presentation (continued)*

- 5) Click *Update* at the top of the screen to apply the change.

**NOTE**

*Be sure to review the worksheet with your revised entry. In some instances, you may find you need to adjust the revision you make because the revised entry does not fit properly onto the worksheet.*

**Customizing the Format of Date and Time Displays**

The following table shows how you can customize the format of date and time displays.

To display:	Use this format:
Months as 1-12	M
Months as 01-12	MM
Months as Jan-Dec	MMM
Months as January-December	MMMM
Days as 1-31	D
Days as 01-31	dd
Days as Sun-Sat	ddd
Days as Sunday-Saturday	dddd
Years as 00-99	yy
Years as 1900-1999	yyyy
Hours as 0-23	h
Hours as 00-23	hh
Minutes as 0-59	m
Minutes as 00-59	mm
Seconds as 0-59	s
Seconds as 00-59	ss

## Report Types

Interchange provides two types of reports:

### System Reports

These provide detail and summary statistics on port usage and call activity (*see below*).

### Mailbox Reports

These provide detail and summary statistics on individual mailbox usage (*see page 140*).

## SYSTEM REPORTS

System reports allow you to look at system level information. There are six types of system reports:

- Class of Service (*see below*)
- Hourly Statistics (*see page 133*)
- Port Activity (*see page 135*)
- Port Contention (*see page 137*)
- Port Contention Trend – Monthly (*see page 138*)
- Port Contention Trend – Weekly (*see page 139*)

### Class of Service Report

The Class of Service report displays the current setting for each feature included in each of the 32 available classes of service (numbered 0 through 31), including any out-dialing restrictions as well as digits that can be dialed while holding.

*Class of Service Report (continued on next page)*

Class of Service Report (continued)

Use this report to review the contents of all classes of service on a single screen (or paper).

Top of Screen (EXAMPLE)

COS Number	Name	Restricted Digits	Digits While Holding	Digits While Holding
0	Non UM			
1	Dual Message Store	0 911 1900		
2		0 911 1900		
3		0 911 1900		
4		0 911 1900		
5		0 911 1900		
6		0 911 1900		
7	Supervisor			
8		0 911 1900		
9		0 911 1900		
10		0 911 1900		
11		0 911 1900		
12		0 911 1900		
13		0 911 1900		
14		0 911 1900		
15		0 911 1900		
16		0 911 1900		
17		0 911 1900		
18		0 911 1900		
19		0 911 1900		
20		0 911 1900		
21		0 911 1900		
22		0 911 1900		
23		0 911 1900		
24		0 911 1900		
25		0 911 1900		
26		0 911 1900		
27		0 911 1900		
28		0 911 1900		

Bottom of Screen (EXAMPLE)

Class of Service Number	Class of Service Number							
	0	1	2	3	4	5	6	7
Operator Box Day	000	000	000	000	000	000	000	000
Operator Box Night	000	000	000	000	000	000	000	000
Exit - Gate Box	821	821	821	821	821	821	821	821
Supervisor Status	No	No	No	No	No	No	No	Yes
Access to Group	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Dial Out Allowed	Yes	Yes	No	No	No	No	No	No
Callers Can Page	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Allow to Receive FaxMail	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Lines Allowed to Hold	2	2	2	2	2	2	2	2
Try Extension X Times	0	0	0	0	0	0	0	0
Announcement Position in Queue	No	Yes	Yes	Yes	Yes	Yes	Yes	No
Maximum Message Length	60	60	60	60	60	60	60	60
Maximum Number of Messages	200	200	200	200	200	200	200	200
Maximum Greeting Length	60	60	60	60	60	60	60	60
Maximum Number of Greetings	10	10	1	1	1	1	1	2
Autodelete New Days	99	99	99	99	99	99	99	99
Autodelete Old Days	0	0	0	0	0	0	0	0
Play Menu After Greeting	No	No	No	No	No	No	No	No

Class of Service Number	Class of Service Number							
	8	9	10	11	12	13	14	15
Operator Box Day	000	000	000	000	000	000	000	000
Operator Box Night	000	000	000	000	000	000	000	000
Exit - Gate Box	821	821	821	821	821	821	821	821
Supervisor Status	No	No	No	No	No	No	No	No
Access to Group	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Dial Out Allowed	No	No	No	No	No	No	No	No
Callers Can Page	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Allow to Receive FaxMail	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

System Reports (continued on next page)

---

*System Reports (continued)***Hourly Statistics Report**

The Hourly Statistics report provides the *average* system call activity by hour. You can optionally exclude weekends or Sundays from the report.

**Use this report to** identify peak traffic periods (and potential bottlenecks).

**EXAMPLE**

*A spike in the number of calls processed between a certain time period during the day may identify increased traffic resulting from callers experiencing longer than normal hold times, and thus tying up system ports for extended periods of time.*

*If a review of the Port Contention report shows that during that same period 100% of the Interchange system ports are in use, it is likely that additional callers are receiving a busy signal instead of being processed by the system.*

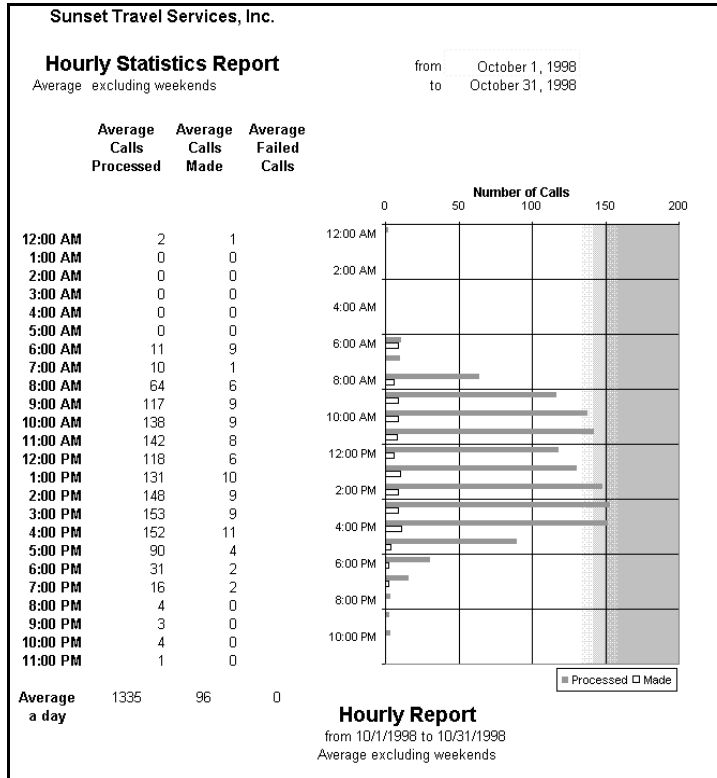
**Possible solutions**

- *Increase the number of people answering calls during that period.*
- *Adjust call routing or provide additional staff training so calls are handled more efficiently and ports are freed more quickly.*
- *Increase the ports on the system.*

*Hourly Statistics Report (continued on next page)*

Hourly Statistics Report (continued)

Hourly Statistics Report (EXAMPLE)



System Reports (continued on next page)

*System Reports (continued)*

**Port Activity Report**

The Port Activity report provides call information for each Interchange system port. As you view the report, you can modify the range of dates to be included.

**Use this report to** monitor overall system performance, such as:

**Are there enough ports to handle all outbound activities?**

These might include wake-up calls, message waiting lamp calls, message delivery calls, etc.

**What is the typical average call length?**

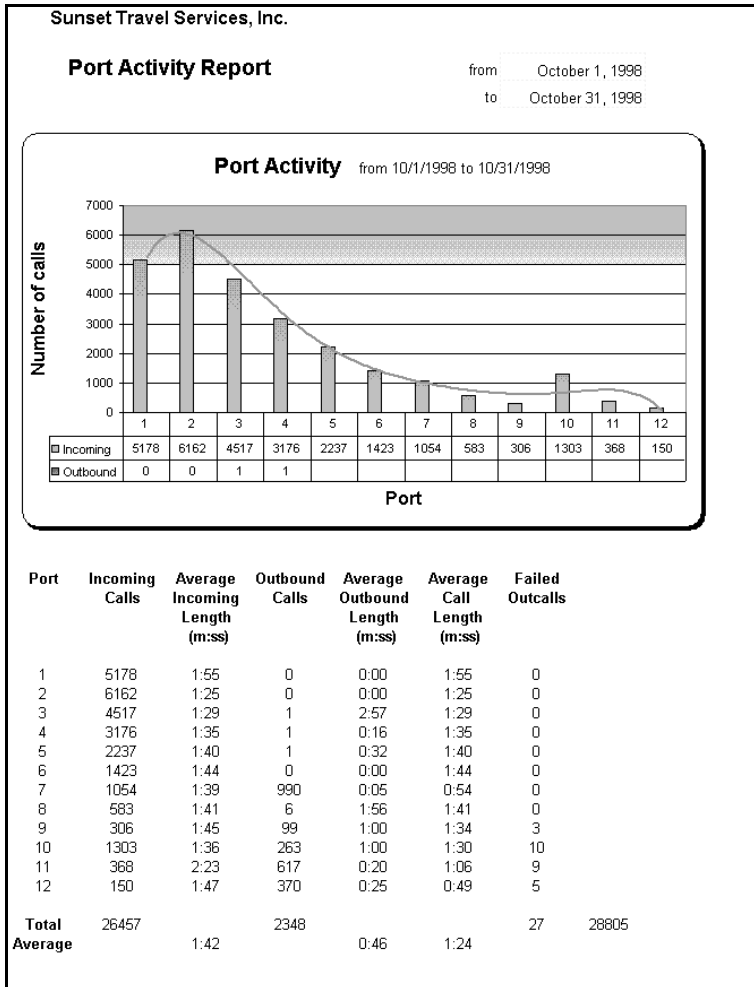
If this number is exceptionally high or low, there may be a technical problem (such as a bad voice board) or a design issue (such as increased call length resulting because callers are using a new question box or IVR application).

This number could also be high if prompts in a routing box are confusing, causing callers to take a long time to navigate through them.

*Port Activity Report (continued on next page)*

Port Activity Report (continued)

Port Activity Report (EXAMPLE)



System Reports (continued on next page)

System Reports (continued)

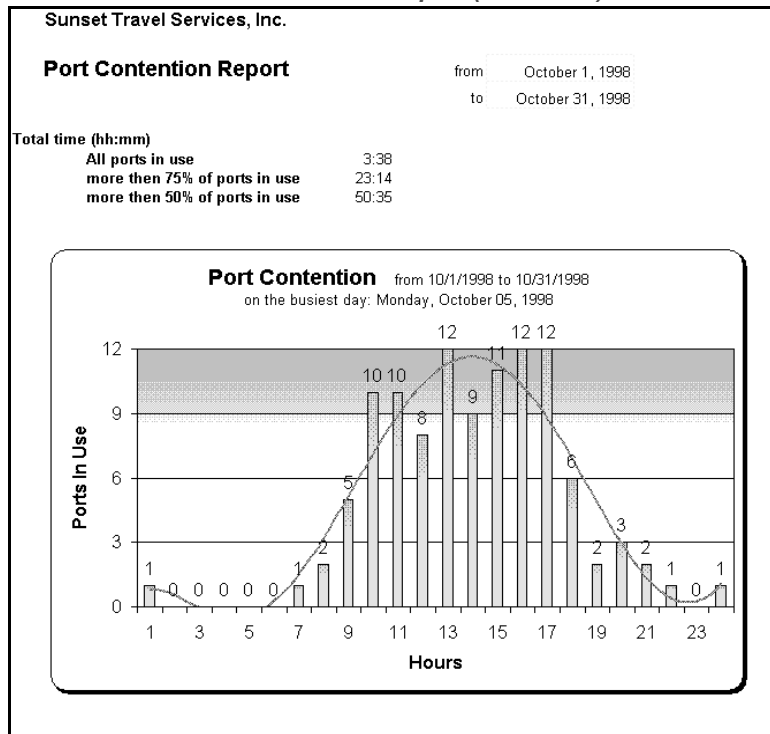
**Port Contention Report**

The Port Contention report graphically displays the total amount of time Interchange experiences 50%, 75%, and 100% *port contention*, meaning all ports are busy or in use simultaneously. (If a range of days is specified, the information for the busiest day during that range is shown, and the date of that day is identified above the graphic.)

**Use this report to** identify peak traffic time periods.

If port contention at any hour is nearing or at 100%, some callers to the company may be hearing a busy signal. This indicates that either additional ports need to be added, or that staffing, call routing, or other adjustments need to be made as discussed in "Hourly Statistics Report" on page 133.

**Port Contention Report (EXAMPLE)**



System Reports (continued on next page)

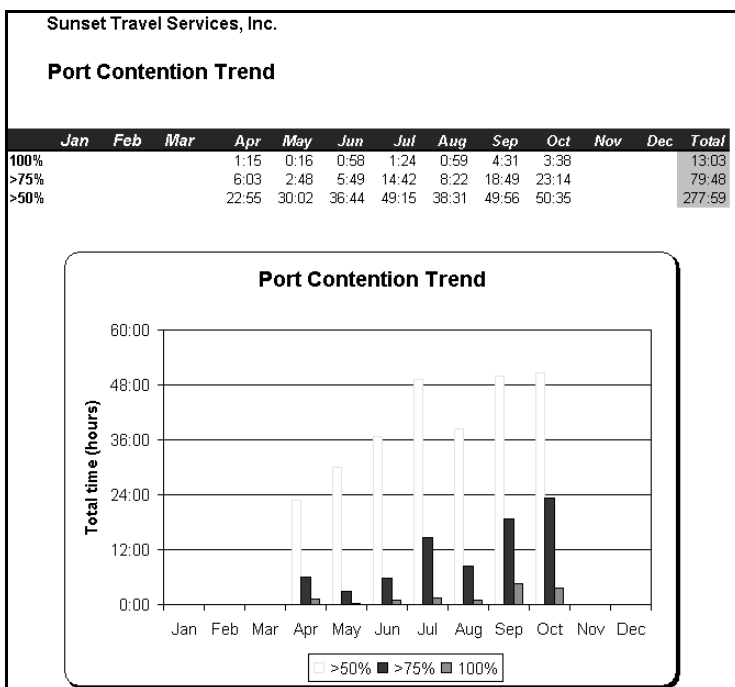
System Reports (continued)

**Port Contention Trend by Month Report**

The Port Contention Trend by Month report displays a graph that shows, by month, the total amount of time Interchange experiences 50%, 75%, and 100% *port contention*, meaning all ports are busy or in use simultaneously. This report displays to the right of the Port Contention report.

**Use this report to** identify *annual* traffic trends or patterns (such as seasonal peaks and valleys in call traffic, a gradual or dramatic growth pattern, etc.).

*Port Contention Trend by Month Report (EXAMPLE)*



System Reports (continued on next page)

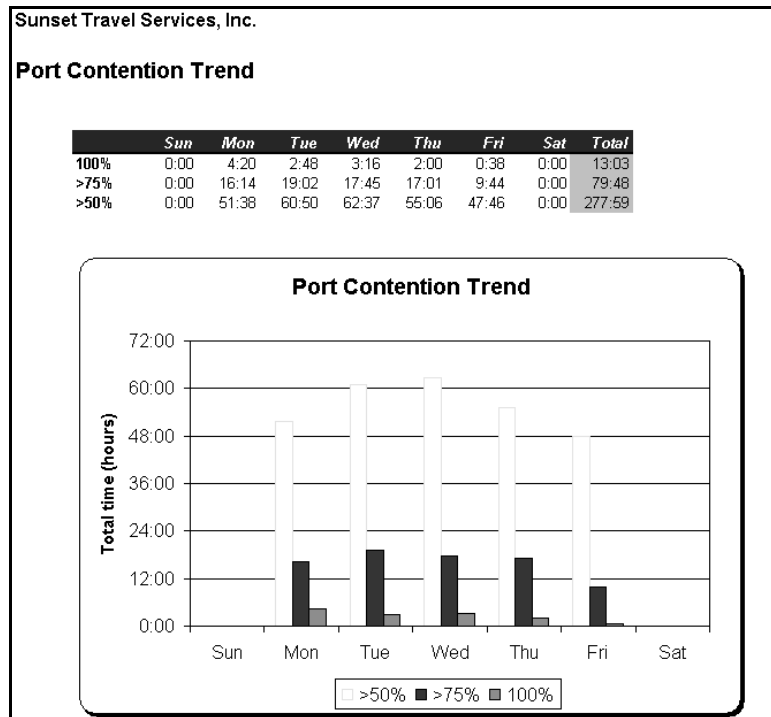
System Reports (continued)

**Port Contention Trend by Day of Week Report**

The Port Contention Trend by Month report displays, by day, the total amount of time Interchange experiences 50%, 75%, and 100% port contention, meaning all ports are busy or in use simultaneously. (This report displays to the right of the Port Contention Trend by Month report.)

**Use this report to** identify daily traffic trends or patterns (such as which days the business generally experiences peaks and valleys in call traffic).

*Port Contention Trend by Day of Week Report (EXAMPLE)*



Report Types (continued on next page)

*Report Types (continued)***MAILBOX REPORTS**

Mailbox reports allow you to look at information about all mailboxes on your system. There are five mailbox reports:

- Mailbox Information (*see below*)
- Mailbox Usage (*see page 142*)
- Message Delivery (*see page 143*)
- Login Failure (*see page 144*)
- Default Password (*see page 145*)

**Mailbox Information Report**

The Mailbox Information report provides *general* information about all mailboxes on the system. (Using Excel 97/98 features, you can sort the report by name, box number, or number of messages.)

**Use this report to** view a summary listing of all mailboxes in the system. The report can also serve as an administration and troubleshooting tool. **You can:**

- compare at a glance the classes of service assigned to different users
- confirm that a group of mailboxes has been given access to VCM or see how many more VCM licenses remain to be assigned (for example, if the total VCM users shown on the report is 48 and 50 licenses have been purchased, two licenses/seats are available)
- identify potential opportunities for freeing storage space on the hard drive (by identifying mailboxes with exceptionally large numbers of saved messages that may be able to be deleted)

*Mailbox Information Report (continued on next page)*

*Mailbox Information Report (continued)*

- identify old mailboxes that are no longer in use and can be deleted.

**Mailbox Information Report (EXAMPLE)**

Sunset Travel Services, Inc.							
Mailbox Information Report				as of October 31, 1998			
Name	Box #	Extension	Class of Service	New Messages	Old Messages	VCM User?	Last Login
Anderson, George	362	362	4	0	22	Yes	10/30/1998
Brown, Vincent	310	310	5	2	19	Yes	10/30/1998
Black, Ann	305	305	4	0	0	No	10/30/1998
Carter, Jeff	342	342	4	0	2	Yes	10/19/1998
Donaldson, Robert	348	348	5	0	16	Yes	10/29/1998
Green, Elizabeth	326	326	3	0	18	No	10/29/1998
Jones, Thomas	303	303	5	0	19	Yes	10/30/1998
...	...	...	...	...	...	...	...
O'Brien, Pat	311	311	5	1	4	Yes	10/30/1998
Sanders, Jeff	370	370	4	0	3	Yes	10/16/1998
Smith, John	340	340	5	2	13	No	10/30/1998
Thomas, Dave	321	321	5	0	13	Yes	10/30/1998
White, Shirley	302	302	5	6	49	Yes	10/30/1998
Wright, Evelyn	314	314	4	1	6	Yes	10/30/1998
	<b>Boxes</b>			<b>New Messages</b>	<b>Old Messages</b>	<b>VCM User?</b>	
<b>Total</b>	135			89	485	48	

*Mailbox Reports (continued on next page)*

*Mailbox Reports (continued)***Mailbox Usage Report**

The Mailbox Usage report provides *detailed* information on the use of system mailboxes for the current and previous month. (On-screen options allow you to sort the report by name or box number.)

**Use this report to** track specific activity on how mailbox owners are using their mailboxes. You can also compare activity for the current and previous month. Data on the report may identify mailbox owner training requirements. **The report identifies:**

- how frequently the mailbox owner accesses the mailbox
- total messages received and sent by the mailbox
- the number of faxes received and sent by the mailbox
- who is using VCM and to what extent
- who is using out-calling and to what extent
- how often calls reach voice mail and why (e.g., the mailbox owner does not answer or is on the phone).

**Mailbox Usage Report (EXAMPLE)**

<b>Mailbox Usage Report</b>				as of October 31, 1998			
Sorted by Mbox Number				Time Format: h:mm			
Mailbox Number: <b>302</b>		Subscriber: <b>White, Shirley</b>		Ext: <b>302</b>			
Date of last use: Oct 30, 1998							
	Current Month	Previous Month	Total		Current Month	Previous Month	Total
Subscriber Logins	134		134	Busy Transfer	309		309
Owner Login Time	8:28		8:28	No Answer Transfer	2		2
VCM calls	3		3	Successful Transfer	362		362
VCM time	0:19		0:19	Outcalls Placed			0
				Total Outcall Time			0:00
Mailbox Number: <b>303</b>		Subscriber: <b>Jones, Thomas</b>		Ext: <b>303</b>			
Date of last use: Nov 1, 1998							
	Current Month	Previous Month	Total		Current Month	Previous Month	Total
Subscriber Logins	1	82	83	Busy Transfer		23	23
Owner Login Time	0:02	0:59	1:01	No Answer Transfer			0
VCM calls			0	Successful Transfer	1	201	202
VCM time			0:00	Outcalls Placed	3	31	34
				Total Outcall Time	0:02	0:37	0:39
Mailbox Number: <b>305</b>		Subscriber: <b>Black, Ann</b>		Ext: <b>305</b>			
Date of last use: Oct 30, 1998							
	Current Month	Previous Month	Total		Current Month	Previous Month	Total
Subscriber Logins	121		121	Busy Transfer	67		67
Owner Login Time	3:37		3:37	No Answer Transfer	33		33
VCM calls			0	Successful Transfer	171		171
VCM time			0:00	Outcalls Placed			0
				Total Outcall Time			0:00

*Mailbox Reports (continued on next page)*

Mailbox Reports (continued)

**Message Delivery Report**

The Message Delivery Report provides a summary of all message delivery events by mailbox number.

**Use this report to control costs and to help secure Interchange.**

**EXAMPLE**

*Consider an employee who leaves the company. As a field technician who was on the road much of the time, the employee had his mailbox set up to deliver all his messages to his current field location (typically a long distance call).*

*However, when he left the company, no one deleted his mailbox. Therefore, box still receives company-wide broadcast messages, group box messages, etc., and the messages are still being delivered to his last long distance telephone number.*

*You can also use this report to help identify potential system security breaches that involve the message delivery feature.*

**Mailbox Delivery Report (EXAMPLE)**

Sunset Travel Services, Inc.						
Message Delivery Report				from	October 1, 1998	
				to	October 31, 1998	
Name	Box #	Phone to call	Answered	Busy	No answer	
Anderson, George	362	414-555-1212	19	1	14	
Jones, Thomas	303	922-3800	9		6	
...	...	...	...	...	...	
White, Shirely	302	419-3800	41			
Wright, Evelyn	314	941-925-7278	45			

Mailbox Reports (continued on next page)

*Mailbox Reports (continued)***Login Failure Report**

The Login Failure report provides a list of all unsuccessful login attempts to system mailboxes. An unsuccessful login attempt occurs when a caller enters a mailbox number but fails to enter the valid password.

**Use this report to** help identify suspected security breaches of the system.

***Login Failure Report (EXAMPLE)***

Sunset Travel Services Inc.			
<b>Login Failure Report</b>		from	October 1, 1998
		to	October 31, 1998
Name	Box#	Failed Login	
		Date	Time
Adamson, Tom	162	10/16/98	4:38 PM
Barn, Carry	100	10/01/98	2:28 PM
Freind, Elizabeth	137	10/10/98	4:34 PM
Lemonn, Tom	124	10/11/98	9:35 PM
O'Brien, Larry	120	10/11/98	7:15 AM
Olster, Bob	147	10/01/98	12:51 PM
Porter, Vince	115	10/16/98	2:14 PM
Sulster, Karen	111	10/16/98	12:12 PM
Vett, Penny	140	10/12/98	8:05 AM
Viders, Jennifer	121	10/11/98	1:45 PM
Weggly, Ellen	102	10/10/98	6:23 PM
Woodman, Bill	160	10/04/98	10:38 PM

*Mailbox Reports (continued on next page)*

*Mailbox Reports (continued)***Default Password Report**

The Default Password report provides information about mailboxes whose mailbox owners have not changed their password since the mailbox was originally created or reassigned.

**Use this report to** identify mailboxes that pose a security risk to the company, as outside callers may gain user access to the system more easily.

***Default Password Report (EXAMPLE)***

Sunset Travel Services, Inc.			
Default Mailbox Password Report			as of October 31, 1998
Name	Box #	Initial Password	Last Login
Black, Ann	305	305	10/30/1998
Donaldson, Robert	348	348	10/29/98
...	...	...	...
O'Brien, Pat	311	311	10/30/98
Sanders, Jeff	370	370	10/16/98
<b>Total</b>	12		

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