



# Phone Manager 2.1

## User Guide



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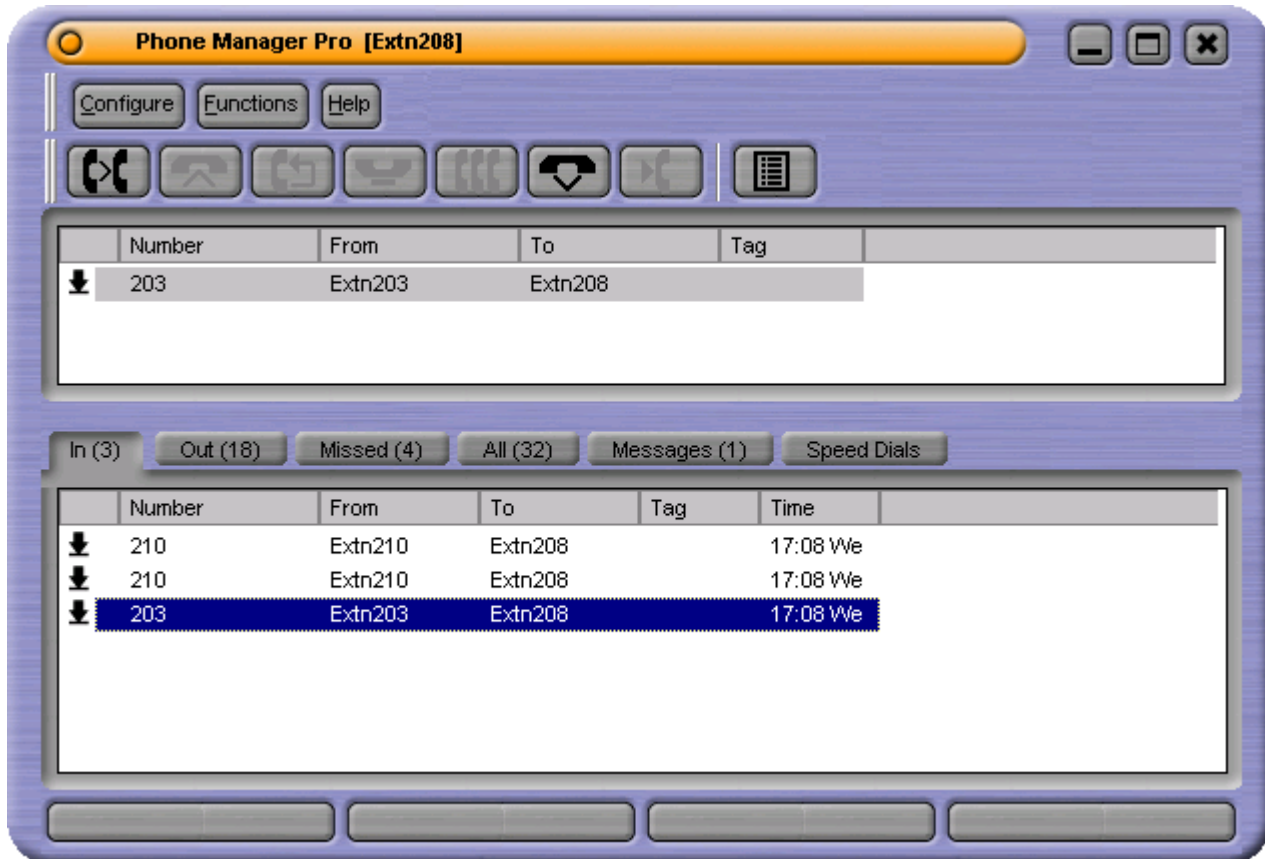
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# Getting Started

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## Introduction

This guide covers both the Phone Manager Pro and Phone Manager Lite applications. Which version you are running is indicated in the title bar of the program. Both versions use the same software which runs as Phone Manager Lite unless suitable licenses are entered on the telephone system.



- Can be used in conjunction with a normal telephone, a caller display telephone or a hands-free phone, telephone/headset combination or PC based soft IP phone (VoIP extension. Note: Not available under Windows 95 and/or Phone Manager Lite).
- Can be used in conjunction with a conventional telephone to give Caller Display Telephone facilities.
- Can be used to enable/disable certain extension features without having to remember the specific Short Codes.
- Provides a display of your current extension feature settings.
- Provides a display of all incoming and outgoing calls to your extension.
- Provides Speed Dials.
- Provides information on the status of the current call.
- Displays the number of messages waiting to be collected from your Voicemail.
- Displays the number of messages waiting to be collected for any Hunt Group of which you are a member.
- Provides details of calls waiting.

### Phone Manager Lite:

This section lists the main differences of Phone Manager Lite.

- Requires no license key on the PBX to operate.
- Call History only displays Missed, All, Messages and Speed Dial tabs.
- Configure Preferences only provides Pop Phone Manager, Hide on Close and Play Sounds.
- Maximum of 15 speed dials.
- No user directory, access to the PBX directory only.

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## Getting Started

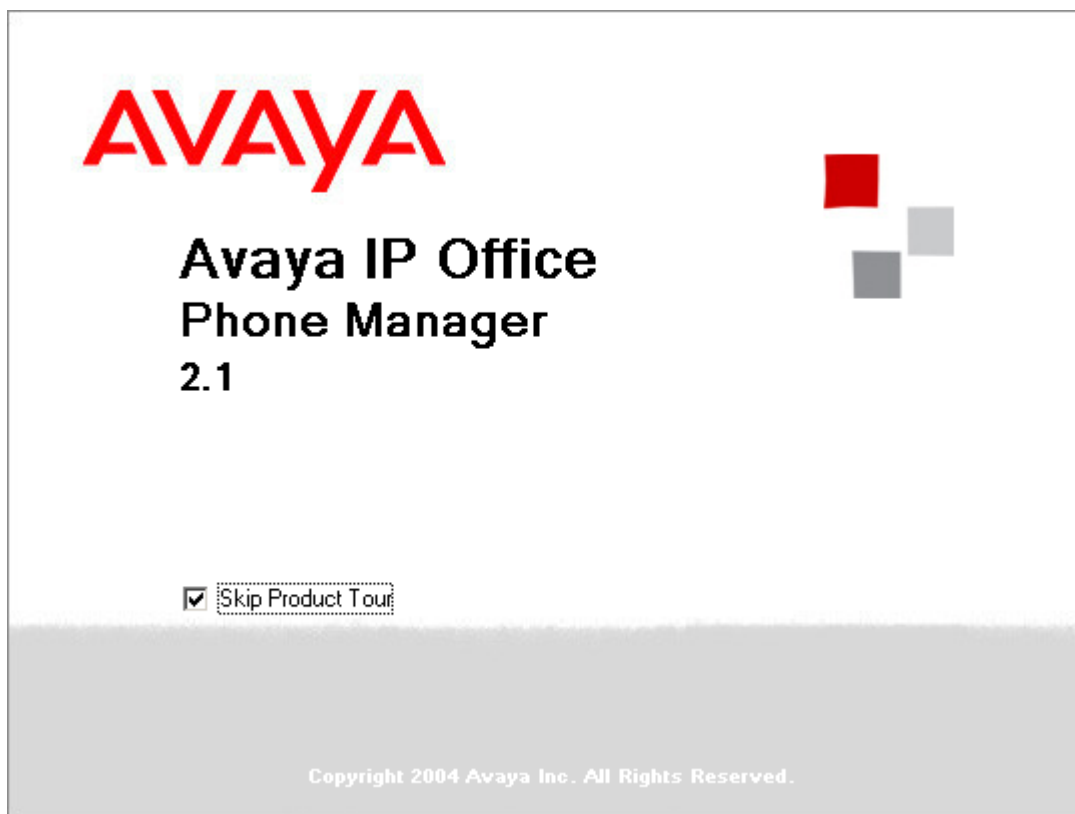
In order to install and use Phone Manager you need to obtain the following information from your System Administrator:

- **User Name:**  
This is your extension number (eg. **201**) or your User Name (eg. **JohnS**) and is case sensitive.
- **Password:**  
This is your User password and is case sensitive.
- **PBX Address:**  
This is the IP Address of your PBX, eg. 192.168.42.1.

Note: To run as Phone Manager Pro requires a valid license available on the IP Office.

To install the Phone Manager application.

1. Enter the User CD in the CD-Rom Drive (D:)
2. Follow the on screen instructions and select the applications you want to install.
  1. Select the **Network Telephone System (PBX Address** of your PBX).
  2. Enter or Select your **User Name**.
  3. Enter your **Extension Number**.
  4. To load the Phone Manager, select START/Programs/IP Office/PhoneManager
  5. The application will load. The Phone Manager Product Tour will automatically start during the product start up. To disable this, check the Skip Product Tour check box on the start up screen.



Note: If not disabled the Product Tour will start every time the application is started.

After the Phone Manager has started;

1. In the **Configure** menu, select **PBX**
2. Enter the information into the **PBX Configuration Information** dialogue box.
  - **Logging On:** *Phone Manager Pro only*  
If you want to logon with a different extension number from that of the physical extension, click on **Login>>**. Check **Login/Logout** and select the number of the **Base Extension** at which you want to log on. When you start Phone Manager, you will be logged on at the **Base Extension** but with the number associated with your **User Name**. When you close Phone Manager you will be logged off and the phone will revert to its **Base Extension** number.
3. Click **OK** or press **Enter**.
4. VoIP extension users should also check the **Enable VoIP** check box by selecting **Configure | Preferences | Phone Manager**. See [Phone Manager](#).

If the information entered is incorrect a warning message appears. Choose **OK** and return to the **Configure** menu and select **PBX**. In the PBX Configuration Information dialogue box check:

- Have you entered the correct extension number?
- Have you entered the correct User Name - Have you used the correct case?
- Have you entered the correct password - Have you used the correct case?
- Have you entered the correct IP address?

If the answer is **Yes** to all of these questions you should contact your System Administrator for further assistance.

- Running more than one Phone Manager using the same extension number (ie. from more than one PC at a time) will cause unpredictable results.



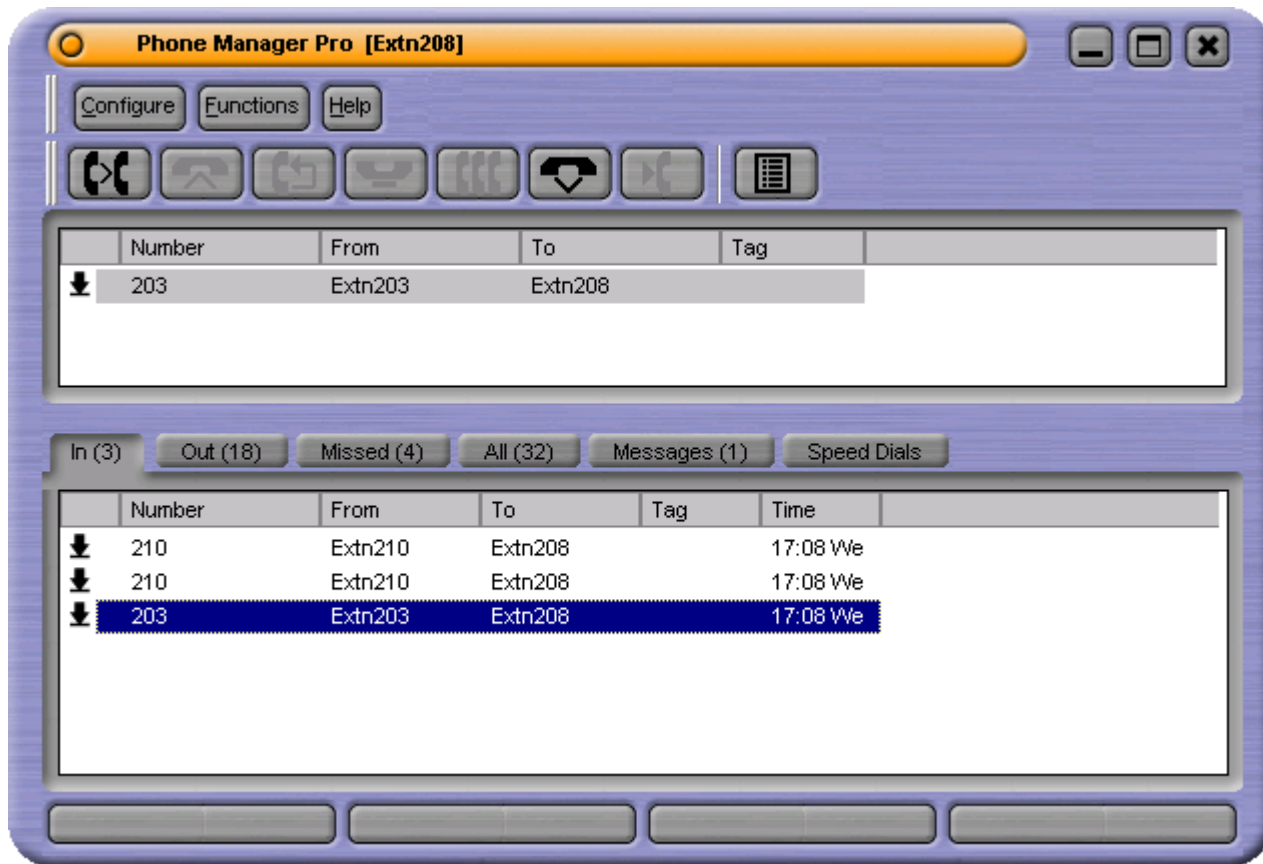


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# Phone Manager

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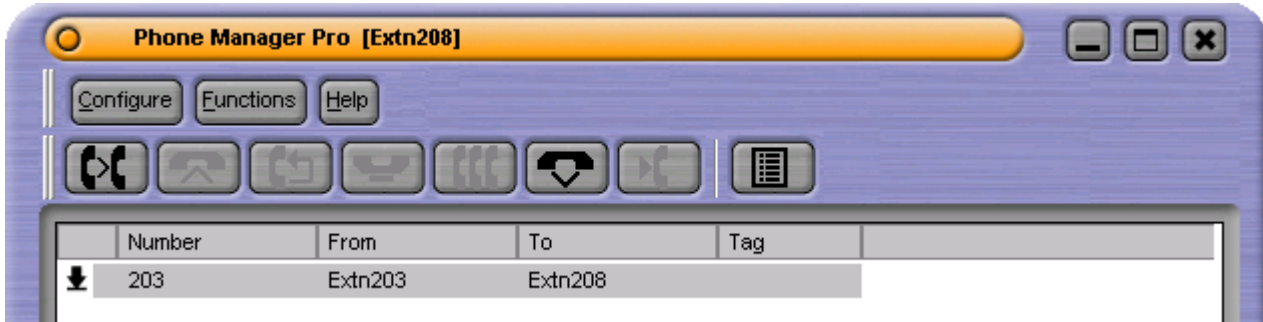
## Main Window



Phone Manager is divided into the follow areas:

- [Call Status.](#)
- [Call History.](#)
- [Call Handling Icons.](#)
- [Call Park Area.](#)

## Call Status



The Call Status pane displays the current state of all active calls, whether they be incoming or outgoing.

- **Number**  
Either the incoming telephone number or the telephone number being called will be displayed together with the relevant [Call Status Icons](#).
- **From**  
This column will display the name that has been associated with the Number in the Directory on the main system (please refer to your System Administrator) or your local Directory (Phone Manager Pro only, see [Directory Entries](#)).
- **To**  
In this column the name that has been associated with the called number in the Directory on the main system (please refer to your System Administrator) or your local Directory (Phone Manager Pro only, see [Directory Entries](#)) will be displayed.
- **Tag**  
Text to identify the call can be entered here. See [Tag a Call](#).

Note: The Call Status display may not always match the display on the handset.

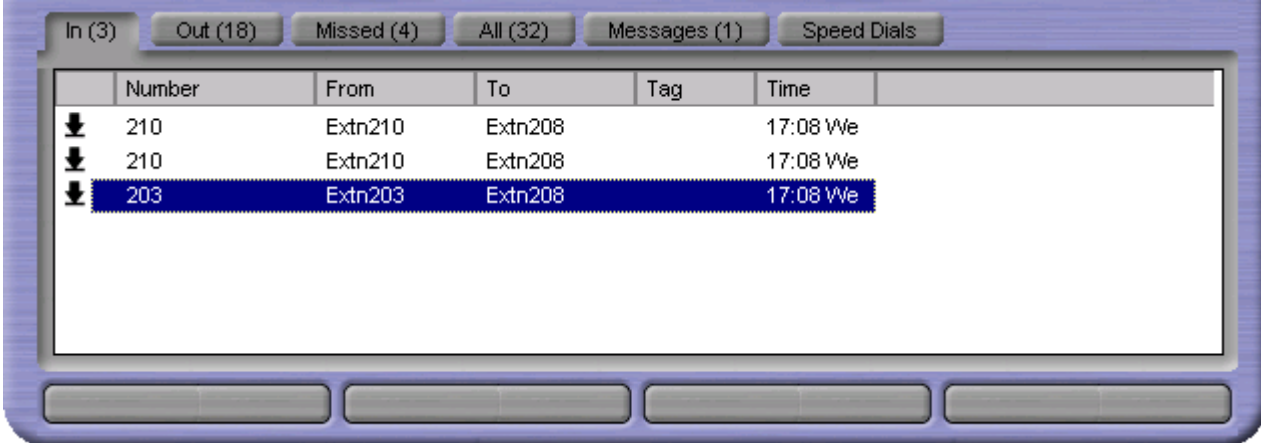
### Call Status Icons

The following icons will appear in Call Status to indicate the status of a call to your extension.

- - Your handset is off hook (making a call).
- - This is the call to which you are currently connected.
- - The call is on hold.
- - The number you are trying to ring is engaged.
- - Indicates an incoming call to your extension.

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## Call History



	Number	From	To	Tag	Time
↓	210	Extn210	Extn208		17:08 We
↓	210	Extn210	Extn208		17:08 We
↓	203	Extn203	Extn208		17:08 We

The **Call History** pane is divided into the following tabs:

- [In](#)  
Lists all calls received by your extension (*Phone Manager Pro only*).
- [Out](#)  
Lists all calls initiated from your extension (*Phone Manager Pro only*).
- [Missed](#)  
Lists unanswered calls to your extension.
- [All](#)  
List of all incoming, outgoing and missed calls.
- [Messages](#)  
Displays the number of new messages in your Voicemail box and for any Hunt Group for which you receive Voicemailringback.
- [Speed Dials](#)  
To store and create speed dial icons.
- [Conference](#)  
When you set up a conference from your extension this tab displays all members of that conference.

For Phone Manager Pro only, the following tabs will also appear in the Call History pane when their features are activated:

- [Status](#)  
Appears when a call is in progress or is in Busy Wrap Up/Busy Not available.
- [Voicemail](#)  
During a call to your Voicemail, box this tab displays all messages and buttons to control these messages.
- [Queue](#)  
To monitor Hunt Group queues configured in the [Queue ID](#) tab in Configure Preferences.
- [Door](#)  
To activate a door release configured in the [Door Release](#) tab in Configure Preferences.
- [Script](#)  
Displays the text configured in the Script File field in a Directory Entry.
- [Account Codes](#)  
Display icons for making calls with accounts codes or applying an account code to a current call.

## **In**

Phone Manager Pro only. The **In** tab lists all calls received by your extension

This tab will display a maximum of 100 calls. When the maximum capacity is reached the oldest record is deleted when a new record is added.

The following options are then available when you right click on a call:

- **Call Number back:**  
Call the selected number.
- **Add to Directory:**  
Automatically create a Directory Entry from the call information
- **Add to Speed Dial:**  
Automatically create a Speed Dial from the call information.
- **Add to Outlook:**  
Automatically add the call information to the Outlook contacts folder.
- **Copy:**  
Copy the "Number" from the selected call onto the PC's clipboard.
- **Delete:**  
Delete the currently selected call from the call history.
- **Clear:**  
Clear all the call information listed in the current pane.
- **Clear All tabs:**  
Clear all the call information listed in the In, Out, Missed and All panes.

*Please also note that the Add to Outlook feature requires Microsoft Outlook to be installed on your PC and the correct configuration of MAPI - please refer to your System Administrator.*

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## Out

Phone Manager Pro only. The **Out** tab displays all calls initiated from your extension. This may be a call manually dialed on the handset or dialed via Phone Manager Pro

This tab will display a maximum of 100 calls. When the maximum capacity is reached the oldest record is deleted when a new record is added.

The following options are then available when you right click on a call:

- **Call Number back:**  
Call the selected number.
- **Add to Directory:**  
Automatically create a Directory Entry from the call information
- **Add to Speed Dial:**  
Automatically create a Speed Dial from the call information.
- **Add to Outlook:**  
Automatically add the call information to the Outlook contacts folder.
- **Copy:**  
Copy the "Number" from the selected call onto the PC's clipboard.
- **Delete:**  
Delete the currently selected call from the call history.
- **Clear:**  
Clear all the call information listed in the current pane.
- **Clear All tabs:**  
Clear all the call information listed in the In, Out, Missed and All panes.

*Please also note that the Add to Outlook feature requires Microsoft Outlook to be installed on your PC and the correct configuration of MAPI - please refer to your System Administrator.*

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## Missed

The Missed tab lists the unanswered incoming calls to your extension.

This tab will display a maximum of 100 calls. When the maximum capacity is reached the oldest record is deleted when a new record is added.

The following options are then available when you right click on a call:

- **Call Number back:**  
Call the selected number.
- **Add to Directory:**  
Automatically create a Directory Entry from the call information
- **Add to Speed Dial**  
Automatically create a Speed Dial from the call information.
- **Add to Outlook:**  
Automatically add the call information to the Outlook contacts folder.
- **Copy:**  
Copy the "Number" from the selected call onto the PC's clipboard.
- **Delete:**  
Delete the currently selected call from the call history.
- **Clear:**  
Clear all the call information listed in the current pane.
- **Clear All tabs:**  
Clear all the call information listed in the In, Out, Missed and All panes.

*Please also note that the Add to Outlook feature requires Microsoft Outlook to be installed on your PC and the correct configuration of MAPI - please refer to your System Administrator.*

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## All

The **All** tab gives a list of all incoming and outgoing calls at your extension.

This tab will display information on a maximum of 100 calls. When the maximum capacity is reached the oldest record is deleted when a new record is added.

The following options are then available when you right click on a call:

- **Call Number back:**  
Call the selected number.
- **Add to Directory:**  
Automatically create a Directory Entry from the call information
- **Add to Speed Dial:**  
Automatically create a Speed Dial from the call information.
- **Add to Outlook:**  
Automatically add the call information to the Outlook contacts folder.
- **Copy:**  
Copy the "Number" from the selected call onto the PC's clipboard.
- **Delete:**  
Delete the currently selected call from the call history.
- **Clear:**  
Clear all the call information listed in the current pane.
- **Clear All tabs:**  
Clear all the call information listed in the In, Out, Missed and All panes.

*Please also note that the Add to Outlook feature requires Microsoft Outlook to be installed on your PC and the correct configuration of MAPI - please refer to your System Administrator.*

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## Messages

The Messages tab indicates the number of new messages in your Voicemail box and for any Hunt Group from which you receive Voicemailringback.

- **To collect your new messages:**  
Double click the Voicemail box you would like to access or right click the required Voicemail box and select Call **Voicemail**.



If the phone is On-Hook it will ring once the Voicemail Server has been contacted. Pick up the phone and listen to your messages. If the phone is already in the Off-Hook state you will be connected to the Voicemail server as soon as it is located. The [Voicemail](#) tab will then appear.

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## Speed Dials

The **Speed Dials** tab allows you to create icons for regularly dialed internal or external numbers. You can create Speed Dials from a list of Users on your system or create your own (15 maximum for Phone Manager Lite).

A Speed Dial also acts as a Busy Lamp Field as follows (except speed dials for ex-directory users):

-  If the user/extension is busy the Speed Dial icon has a red circle with a white cross on it (internal extensions only).
-  If the user/extension has Do Not Disturb set, the Speed Dial icon has a blue circle with a white cross on it (internal extensions only).

(In order for the Busy Lamp Field feature to operate, your PC must be present on the same physical LAN as the PBX - please refer to your System Administrator.)

The following options are then available when you right click within this tab:

- **New:**  
Create your own Speed Dial. See also [Create a Speed Dial](#).
- **Add User:**  
Automatically creates a Speed Dial from a list of Users on your system
- **Edit:**  
Edit an existing Speed Dial
- **Delete:**  
Deletes a Speed Dial
- **Call:**  
Call the number configured in the Speed Dial (or double clicking the icon)
- **Small:**  
Displays the Speed Dials as small icons

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## Status

Phone Manager Pro only. The Status tab appears when you are on a call. It contains a call timer. It can also contain call cost information if setup by your System Administrator.

If working in Agent Mode, the Status tab also appears when you go into Busy Wrap Up or Busy Not Available state.

Whether the Status tab comes to the front when active is controlled by the **Show Status** option in the Phone Manager settings. Note that for incoming calls, if a Script file has been configured, the [Script](#) tab will show for the first 15 seconds after connection.

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## Conference

After setting up a conference from your phone the Conference tab will appear. This shows all the members of the conference. See also [Create a Conference Call](#).










To return this member to the conference, ensure they are selected in the [Call Status](#) pane and click the **Conference** button.

To remove a member from the conference, right click and select **Hang Up**.

## Voicemail

Phone Manager Pro only with Voicemail Pro in IP Office and Intuity mode. On accessing your Voicemail box (either via Voicemail Ringback or by dialing \*17 or via the [Messages](#) tab) a **Voicemail** tab will appear. This will display all new, old and saved messages. You can then use the control buttons (as below) to forward, replay, skip, pause, play, save, delete and play saved messages.

To play a particular message double-click the message.

-  - **Message Back**
-  - **Skip Back**
-  - **Unpause selected message**
-  - **Skip Forward**
-  - **Message Forward**
-  - **Pause selected message**
-  - **Delete selected message**
-  - **Save selected message**
-  - **Play Saved Messages**

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## Queue

Phone Manager Pro only. The **Queue** tab in Call History allows you to monitor the number of calls being held in a queue for a particular Hunt Group. See [Working with Queues](#).

The Hunt Groups you wish to monitor are configured in the [Queue ID](#) tab under **Configure Preferences**. The Hunt Group must already exist on the System and must have Queuing enabled - please refer to your System Administrator.

The Queue tab will then appear in Call History and can display up to two Queue monitors. These monitors will indicate the number of calls currently queued for that Hunt Group. Each call held in a queue is indicated by a blue box. When the mouse pointer is moved over a Queue monitor the number of calls in the queue is displayed in the Hint Box.

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## Door

Phone Manager Pro only. The **Door** tab appears in the Call History pane if the [Door Release](#) options in **Configure Preferences** have been set up.

Click the relevant button to activate the required door.

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## Script

Phone Manager Pro only. The Script tab will appear when a Directory Entry matching the called number has a Script file configured.

For example, a Receptionist may be answering calls on behalf of more than one company. To ensure the call is answered with the correct company name a text file could be created with the company name and details. Phone Manager Pro can then be configured to display this text file whenever a call is received for that company.

1. Create a **Directory Entry** for the extension or Hunt Group that will receive the call. Enter the path to the text file in the **Script File** field.
2. When a call is received on this number the Script tab will appear in the Call History pane and the text file will be displayed.



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Note: The Status tab will automatically come to the front 15 seconds after displaying the Script tab. If you want the script to remain in view, uncheck the **Show Status** option in the Phone Manager settings.



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## Account Codes

Phone Manager Pro only. It allows you to assign system account codes to calls, either when making the call or during existing calls.

Each icon on the tab can store a name, an account code and an optional telephone number. The account codes are selected from those available on the telephone system.

The tab shows two types of icon:

-  **Account Code Without Number**  
Double-click to apply the associated account code to an existing call.
-  **Account Code With Number**  
Double-click to make a call to the stored number or to apply the associated account code to an existing call.

Right-clicking on this tab or over a particular icon gives access to a number of options:

- **Call**  
Call the icon's stored number.
- **Select**  
Apply the icon's account code to an existing call.
- **New**  
Create a new icon.
- **Edit**  
Edit an existing icon.
- **Delete**  
Delete an existing icon.
- **Small**  
Display the icons in small or large form.

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## Call Park Area

It is sometimes necessary to temporarily "park" a call to handle some other task (receive a new call) or deal with an interruption. To help you control this scenario efficiently the main system has four parking areas. These are available for use by all Users on the system. The park areas use Park ID 1, 2, 3 and 4.

For example when an incoming caller needs to speak to someone urgently but they cannot be found, the call could be parked in slot "1" and the specific user paged to pickup the call on "1". This user can then pick up the call via Phone Manager Pro or via a short code (for example **\*38\*1#**) from any extension.

The Call Park Area gives a Park button for each Park ID so that a call can be easily parked and unparked by clicking on the relevant Park button. This has the added benefit that the original User who handled the call can then see when the call has been picked up as it will disappear from the Park button.

### Park a Call

To park a call click on the Park button required, click it again to pick up the call. While a call is parked it will display the Tag field or, if not available, will show the source number of the call.

### Tag a Parked Call

A Tag can be used to identify a parked call with a text description

1. Before parking the call, right click on the Park button required.
2. Enter the description in the [Call Tag Form](#).

3. The call will be parked and the description will appear on the Park button.

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## Configure Menu

The Configure menu provides access to the following:

- **[PBX Configuration Information](#)**  
Select this option to configure Phone Manager Pro to communicate with the PBX.
- **[Configure Directory](#)**  
Directory allows you to create and edit a locally stored list of names and numbers that can be used for speed dialing or to identify incoming calls.
- **[Configure Preferences](#)**  
Select this option to define your personal setting, eg. Forwarding options etc.
- **Language**  
Select this option to change the language display of the Phone Manager application. The Phone Manager display will automatically be changed to the language selected.
- **[Default Sizing](#)**  
This feature will return the Phone Manager Pro window to its default size after resizing.
- **Load Skin**  
Select this option to load customs skins that have been created. Refer to Job Aid 077 Loading and Creating Skins
- **Exit**  
The **Exit** command closes Phone Manager and saves any configuration details, eg. new Speed Dials.

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## PBX Configuration Information

This dialogue box allows you to configure Phone Manager to communicate with the telephone system. Click on **OK** after entering your details. If incorrect details are entered a warning message is displayed.

- **User Name**  
Enter your extension number (eg. **201**) or User Name (eg. **JohnS**). This will be given to you by your System Administrator. Please note that the User Name is case sensitive.
- **Password**  
Enter your User password. This will be given to you by your System Administrator. Please note that the password is case sensitive.
- **PBX Address**  
Enter the IP Address of the main system, eg. 192.168.42.1. This will be given to you by your System Administrator. Please note that this can not be a broadcast address, eg. 255.255.255.255.
- VoIP extension users should also check the **Enable VoIP** checkbox by selecting **Configure | Preferences | Phone Manager**. See [Phone Manager](#).

The **Login** button is used to show or hide the login options (Phone Manager Pro only). The options are:

- **Login/Logout**  
Check this box if you want to use Phone Manager to login/logoff.
- **Base Extension**  
Enter the extension at which Phone Manager should log you in when started. When logged in, that extension adopts your user name and phone number. You will be logged out from that extension when you exit Phone Manager.
- Note: When Login/Logout is selected, the PBX Configuration Information menu appears each time Phone Manager is started. This is in order to confirm the extension at which you are logging in.

---

## Configure Directory

Phone Manager Pro only. The Configure Directory dialogue box allows you to create a personal directory of frequently used numbers. Each Directory Entry appears in the Call dialogue box (if the **Show Directory** option is checked) for quick dialing.

Directory Entries can also be used to match the CLI or DID of incoming calls to a name. This can be used to play a media file or display a text file. Phone Manager attempts to match the incoming CLI first and if no match exists it then looks for a match to the DID.

- **New:**  
Create a new Directory Entry
- **Edit:**  
Edit the selected Directory Entry
- **Delete:**  
Delete a Directory Entry
- **Close:**  
Clicking this button will close the Configure Directory Window. Any changes that have been made since the Configure Directory Window was opened are saved.
- **Help:**  
Clicking this button launches the Phone Manager Help Text.

---

## Directory Entry

Phone Manager Pro only. The Directory Entry menu contains the following fields:

- **Number:**  
The telephone number (or Short Code) that will be dialed when this Directory Entry is selected in the [Call](#) dialogue box.
- **Name:**  
The name you wish to associate with the number entered above.
- **OK:**  
Click this button to add the entry to your personal Directory list. (Please note that this entry is not saved until you exit the Configure Directory dialogue box).
- **Cancel:**  
On selecting the Cancel Button all changes made to the current Directory Entry are lost. You are then returned to the Configure Directory dialogue box.
- **Help:**  
Clicking this button launches the Phone Manager Pro Help Text.
- **Add Speed:**  
The current Directory Entry is automatically added to your [Speed Dials](#) tab in Call History.
- **Script File:**  
Enter the path to the txt/rtf file to be displayed when a call is made to the number entered in the Number field. See [Script](#) tab.
- **Browse for Script:**  
Use the Browse button to find the correct file and enter the correct path on your PC or network.
- **Media File:**  
Enter the path to the .WAV, .AVI, etc. file that will be played when a call is received from the number entered above. Note that Play Sound must also be checked in the **Phone Manager** tab of the **Configure | Preferences** menu.
- **Browse for Media:**  
Use the Browse button to find the correct Media File and enter the correct path on your PC or network.

- **New WAV:**  
Clicking this button will allow you to create a .WAV file in the Phone Manager Pro default directory.
- **Clear File:**  
Clicking this button clears the information in the Media File box.

---

## Configure Preferences

The Preferences option in the Configure menu allows you set up your personal settings for forwarding, Voicemail, etc.

---

### Forwarding

This menu controls the forwarding of calls from your extension.

- **Follow Me To Number:**  
Enter the number to which all calls are to be redirected. If this number is busy or not answered, then the call behaves as though your extension had failed to answer. (ie. If not answered then **Forward On No Answer** will be performed if set).
- **Forward Unconditional:**  
Enter the number to which all calls are to be redirected. All incoming calls to your extension will be forwarded to this number.
- This option only applies to incoming calls to your extension number. Calls to a Hunt Group of which you are a member are only forwarded if you switch on **Forward Hunt Group Calls**. See below.
- **Forward On Busy:**  
Enter the number to which all calls are to be redirected. When your extension is busy calls will be forwarded to this number.
- **Forward On No Answer:**  
Enter the number to which all calls are to be redirected. When your extension is not answered calls will be forwarded to this number.
- **Forward Hunt Group Calls:**  
Hunt Group calls received by your extension will be forwarded to the 'Forward Number'. This option only works when **Forward Unconditional** is on.
- Note: This only applies to Hunt Groups that are configured for Hunt or Rotary ringing mode – contact your System Administrator if unsure.

See also [Transfer Back to Forwarded Extension](#).

---

## Do Not Disturb

This menu controls the Do Not Disturb operation of your extension.

- **Do Not Disturb:**  
This option selects whether the Do Not Disturb feature is enabled or disabled for your extension. The option is enabled when the box is "checked".

The Do Not Disturb function forces the System to think that your extension is busy. However under certain circumstances you may wish to allow specific callers through when blocking all others. This feature can be achieved by adding those numbers to the Do Not Disturb Exception List.

- **DND Exception Number:**  
Enter the number to be included in your DND Exception List and select Add
- **DND Exception List:**  
This lists the numbers that will ring your extension when Do Not Disturb is enabled. The DND exception number can be an internal extension or an external number. If you wish to allow a range of numbers through the DND wall, you can either enter each number separately or make use of the variables "N" or "x" in the number. For example, to allow all numbers from 01923699000 to 01923699099 the DND Exception number can be entered as either 019236990xx or 019236990N.

---

## Voicemail

This menu controls the Voicemail operation of your extension, assuming Voicemail is available on your system.

- **Voicemail:**  
Selecting this checkbox will allow incoming callers to leave a message if your extension is busy or not .
- **Voicemail Ringback:**  
When selected the System will automatically call your extension to inform you that you have a new message. Ringback occurs two seconds after you replace your handset when you have an uncollected Voicemail message.

---

## Telephone

This menu controls the basic telephony features of your extension.

- **Call Waiting:**  
This allows a call to be presented to your phone even when the phone is in use. A beep will be heard in the ear and [Call Status](#) will show who is calling. Press 'Recall' on the phone, or select the second call in Call Status, you will receive the waiting call and your current call will be placed on hold. You can then swap between calls by clicking on the call you require.
- **Off Hook Operation:**  
Off Hook operation allows the phone to be controlled via the Phone Manger Pro without having to physically lift the phone on/off the cradle. When using a Hands Free phone and/or headset the 'phone' should be left off-hook permanently.
- **Busy on Held calls:**  
If on, when the user has a call on hold, new calls receive busy tone (ringing if analog) or are diverted to Voicemail if enabled, rather than ringing the user. Note this overrides call waiting when the user has a call on hold.

## Phone Manager

This menu controls the features of Phone Manager.

- **Pop Phone Manager:**  
When an incoming call is received the Phone Manager application will 'Pop' to the front and become the foreground application.
- **Hide on Close:**  
Phone Manager Pro is minimized to the System tray on the Windows Taskbar when you close the application rather than exiting.
- **Play Sounds:**  
Incoming calls are alerted by playing a sound.
- **Hide on no calls:**  
Phone Manager Pro only. Phone Manager Pro automatically minimize when you have finished all calls.
- **Pop on Answer:**  
Phone Manager Pro only. Phone Manager Pro will only pop when an incoming call is received.
- **Pop on Page Call:**  
Phone Manager will pop when a page call is received.
- **Show All/Show In/Show Out/Show Missed/Show Messages:**  
Phone Manager Pro only. Causes the corresponding tabs to be displayed in the Call History panel.
- **Enable VoIP:**  
Ensure this is checked if the User Name you have associated the Phone Manager with (see [Getting Started](#)) is a VoIP extension.
- **Show Status:**  
Controls whether the Status pane comes to the front when a call is answered.
- **Show Cost of Call:**  
Shows the costs of the call.
- **Show Account Codes:**  
Phone Manager Pro Agent mode only. Shows the account code available.

---

## Park ID

By default each Park button in the [Call Park Area](#) is configured for the four system park areas which means a parked call can be picked up at any extension. See also [Park a Call](#).

However you may wish to create personal/group park areas where Users can only pick up the call if they know the Park ID (maximum 9 characters).

For example a call parked on the fourth Park button could use Park ID 55. Other users who wish to pick up that call could either configure one of their own Park IDs also for 55 or use a short code (for example \*38\*55# - please refer to your System Administrator).

You can also use text to create a Park ID, however another User will not be able to pick up a call parked in this area using a short code.

---

## Queue ID

Phone Manager Pro only. The Queue ID tab allows you to select up to two Hunt Groups. You will then be able to monitor the number of calls being held in their queues. See also [Working with Queues](#).

The Hunt Group must already exist on the System and must have Queuing enabled - please refer to your System Administrator. Each drop down box will give a list of valid Hunt Groups that can be chosen.

The [Queue](#) tab will then appear in [Call History](#) and displays two Queue monitors that will indicate the number of calls currently queued for the specified Hunt Groups. Each call held in a queue is indicated by a blue box. When the mouse pointer is moved over a Queue monitor the number of calls in the queue is displayed in the Hint Box.

---

## Door Release

Phone Manager Pro only. The Door Release tab in Configure Preferences allows you to create a button to open a door from Phone Manager Pro, thus making it easier to control the door when on the telephone.


1. In the **Door Name** box enter the name you wish to appear on the button.
2. In the **Door Code** box enter the number of the door relay to activate (1 or 2). The relay will be pulsed open for 5 seconds.

The [Door](#) tab will then appear in the Call History pane with a button for each door configured.

---

## Agent Mode

Phone Manager Pro only. This tab is used to control Phone Manager in Agent Mode.

The **Agent Mode** check box is used to enable Agent Mode, see [Agent Mode Operation](#). When enabled several additional icons are shown in the Phone Manager toolbar. See [Call Handling Icons](#). The  icon can then be used for quick access to this tab.

The list shows the groups of which you are a member. The checked groups are those for which you will receive calls when you are not in a Busy Wrap Up or Busy Not Available state. The unchecked groups are those for which your membership is currently disabled.

Note:

- If you use a group key or function on your telephone to go in or out of group, it will do so for all groups of which you are a member rather than just those selected in the **Agent Mode** tab.
- In Agent Mode, the functions of the **F1** and **F3** keys are swapped. **F1** becomes 'account code' and **F3** becomes 'call'.

---

## Short Cut Keys

The Short Cut keys tab allows you to change the short cuts assigned to specific features or functions.

To change Short Cut Keys:

1. Click the Command you wish to change.
2. Select the Short Cut Key from **Select new shortcut** drop down box.
3. Click **Assign**.

## Screen Pop

This enables integration to contact management packages. This allows Phone Manager to Screen Pop contact details. The following content management packages are supported ACT! 6.0, Goldmine 6.0 Maximizer 7.5 Enterprise and Microsoft Outlook.

The Screen Pop options are only available when the content management packages are installed and are detected by Phone Manager. The Phone Manager uses the following screen pop order if more than one application is selected in the screen pop tab.

1. Act! 6.0
2. Goldmine 6.0
3. Maximizer 7.5 Enterprise
4. Outlook
5. External Program

This means that if both Act! and Goldmine is selected, only Act! will be used for screen pop.

- **Pop Act!**

1. Enter your Act! Database file name (.dbf)
2. Enter the Name of your Act! Database
3. Enter your password of the Act! Database
4. Click O.K.

The Act! Database will need to be open on your desktop. The record of the caller will be popped on receipt of the call.

- **Pop Goldmine**

1. Enter the path of the Goldmine Server (gmw6.exe)
2. Click O.K.

The Goldmine Database will need to be open on your desktop. The record of the caller will be popped on receipt of the call.

- **Pop Maximizer**

1. Enter the path of the Maximizer Server (Maxwin.exe)
2. Click O.K.

The Maximizer Database will need to be open on your desktop. The record of the caller will be popped on receipt of the call.

- **Pop Outlook:**

Phone Manager Pro Only. This option looks inside the default Contacts folder within MS Outlook 98+, and if the incoming phone number matches a number in one of your Contacts that Contact will pop up. (Please note that MAPI must be installed on your PC for this facility to be available - please refer to your System Administrator for further information.)

- **Pop External Program:**

Phone Manager Pro only. This is a Third party External Program specifier that is executed when normal popping would occur. The program is invoked using parameters.

The program is invoked with the following parameters:

```
Extprogram<calling_party><called_party><taginfo><account_code><display>
```

The parameters should not contain spaces or quotation marks. Entering parameters with spaces will cause the external program to see multi parameters.



---

## Audio Codec

This tab appears if the Phone Manager is being used as a VoIP extension. It allows the audio codec of the Phone Manager to be changed to match that set for the extension in the telephone system.

Please select your preferred audio codec for VoIP.

- Use the  &  keys to select the audio codec required.
- Select the number of **Frame Per Packet**
- Select **Enable FastStart** if required

Note: Phone Manager must be closed and restarted for any change to the **Audio Codec** tab to take effect.

---

## Default Sizing

This option is used to return the Phone Manager window to its original size.

- Clicking the **Yes** button will resize the Phone Manager window to its default size.
- Clicking the **No** button cancels the resizing request and returns you to the Phone Manager window.

---

## Functions Menu

The Functions menu gives access to a number of call handling commands:

- **Reclaim**  
This functions allows you to reclaim a call that has been accidentally transferred to the wrong person. Reclaim works even if the call has been successfully put through, even to Voicemail. It is also possible to reclaim a call that was originally ringing on your phone and has moved on to the next extension in your Hunt Group.

Note: You can only reclaim a call which has been presented to a Phone Manager user.

- **Call (F1)**  
The Call function will allow you to make a telephone call to an internal or external number via the [Call](#) dialogue box. If you are currently on a call this function will give you the [Transfer](#) dialogue box.
- **Answer (Enter)**  
The Answer function will answer a call when using a phone configured for Off-Hook Operation. This function is also used to inform the PBX that you wish to be given a call to Answer. This will be a call queued for your Hunt Group. The call will be displayed in the [Call Status](#) pane, use the Answer function again to speak to the caller.
- **Transfer (F2)**  
The Transfer function will allow you to transfer a call to another destination (internal or external) via the [Transfer](#) dialogue box.
- **Hold (F4)**  
This function will place a call on hold while another tasks is completed. This will then allow you to answer or make another call. If you wish to ensure you do not receive a call when you have another on hold you can set the Busy On Held Call feature in [Configure Preferences](#).

- **Account Code (F3)**

The Account Code function is used to assign a predefined code to a call. On selecting this function you will be given the [Call](#) dialogue box however the Tag field is replaced by the Account Code field. Please refer to your System Administrator for a list of predefined Account Codes to be used. See also [To Make a Call Using an Account Code](#).
- **Record (F5)**

This function will allow you to record your current conversation either into your Voicemail box or into a central Voicemail box - please check with your System Administrator. If this option is grayed out this function is not available on your system - please refer to your System Administrator.
- **Absent (F6)**

When you are away from your phone you may wish to inform internal callers that you are, for example, on holiday or in a meeting. The Absent function will allow you to set up this message via the [Absent Status](#) dialogue box. When a call is made to your extension via Phone Manager Pro this message will appear at the top of the [Call](#) dialogue box. See also [Set an Absent Message](#).
- **PickupQueue1 (F7)**

Having configured Queue ID 1 in [Configure Preferences](#) you can then use this function to request a call from that queue. See also [Working with Queues](#).
- **PickupQueue2 (F8)**

Having configured Queue ID 2 in [Configure Preferences](#) you can then use this function to request a call from that queue. See also [Working with Queues](#).
- **Conference**

The Conference function will allow you to place all calls on hold into a Conference. See also [Create a Conference Call](#).
- **Ringback when free (internal only)**

This function will set Ring Back When Free on a busy extension. When this extension becomes free your phone will ring and a call to the destination will be initiated once you have answered your ringing phone. If the busy extension has Call Waiting set you will be unable to use this function.
- **Park/UnPark1-4 (F9-F12)**

This function will allow you to park a call in one of the four park areas on the system. The call will then appear on the relevant Park button in the [Call Park Area](#). You can then use the same function to pick up this call.
- **Busy Not Available (Ins)**

For Agent Mode operation. Toggles Busy Not Available status on or off.
- **Busy Wrap Up (Del)**

For Agent Mode operation. Toggles Busy Wrap Up status on or off.
- **Clear (Esc)**

The Clear function will clear the current call only. This may be useful when you do not wish to complete a screened transfer because the destination number is busy or cannot take the call and you therefore wish to return to the original caller. This function can also be used to refuse an incoming call. The call will be returned to the queue. This can be very useful if you accidentally pick up a call from the wrong queue. See also [Working with Queues](#).
- **Join a Conference**

This function will allow you to join a IP Office Conferencing Center conference.
- **Book a Conference**

This function will allow you to book a IP Office Conferencing Center Conference. Only available if permission is specified by your System Administrator.
- **HangUp (End)**

The Hangup function simulates the function of actually hanging up the phone, ie. finish the current call. Therefore is very useful on phones configured for Off Hook Operation.

---

Note: When Phone Manager is in Agent Mode, the roles of the **F1** and **F3** functions are swapped.

---

## Call

Enter the number of the person you wish to call into the Number field and click the Call button, the number will then be dialed. See also [Make a Call](#).

- **Number:**  
The telephone number (or Short Code) that will be dialed when the Call button is selected. The status of an internal number is displayed above the number field.
- **Name:**  
This is the name associated with number to be called. The name could be a User or Hunt Group or Directory Entry. The name will be automatically entered when a match is found with the digits entered in the Number field. Alternatively enter the name in the Name field and if a match is found the number required will be automatically entered. As you enter each letter of the name the Directory List (if used) is automatically truncated to show only those names which match the letters typed in the Name field.
- **Tag:**  
The Tag Field can be used to add messages to the outgoing call (internal only). See [Tag a Call](#). Not supported for VoIP extensions.
- **Directory List:**  
A list of names and numbers configured on the PBX and in your own personal Directory (Phone Manager Pro only). You can select whether to display/search either Users, Hunt Groups or PBX Directory Entries by checking the **Show Users**, **Show Hunt Groups** or **Show Directory** check boxes. Phone Manager directory entries are always shown.
- **Call:**  
Clicking this button will call the number entered.
- **Cancel:**  
The Cancel Button will close the Call dialogue box and you are then returned to the [Main Window](#).
- **Help:**  
This button will launch the Phone Manager Pro Help Text.
- **Voicemail:**  
The Voicemail button calls a local User's Voicemail rather than calling the User direct.
- **Ringback:**  
The Ringback Button will set a Ring Back When Free on the destination extension. When the destination becomes free your phone will be called back. If this Ring Back call is answered a new call will be automatically placed towards the destination extension. If the Ring Back is not answered then the Ring Back is cancelled.

## Call (with Account Code)

See also [Using Account Codes](#).

- **Number:**  
The telephone number (or Short Code) that will be dialed when the Call button is selected. The status of an internal number is displayed above the number field.
- **Name:**  
This is the name associated with number to be called. The name could be a User or Hunt Group or Directory Entry. The name will be automatically entered when a match is found with the digits entered in the Number field. Alternatively enter the name in the Name field and if a match is found the number required will be automatically entered. As you enter each letter of the name the Directory List (if used) is automatically truncated to show only those names that match the letters typed in the Name field.
- **Account Code:**  
Enter the Account Code to be used to log this call to a specific account or customer.
- **Directory List:**  
A list of names and numbers configured on the PBX and in your own personal Directory (Phone Manager Pro only). You can select whether to display/search either Users, Hunt Groups or PBX Directory Entries by checking the **Show Users**, **Show Hunt Groups** or **Show Directory** check boxes. Phone Manager directory entries are always shown.
- **Call:**  
Click this button to call the number entered.
- **Cancel:**  
The Cancel button will close the Call dialogue box and you are then returned to the [Main Window](#).
- **Help:**  
This button will launch the Phone Manager Pro Help Text.
- **Voicemail:**  
The Voicemail button calls an internal User's Voicemail box rather than calling the User direct.
- **Ringback:**  
**The Ringback** button will set a Ring Back When Free on the destination extension. When the destination becomes free your phone will be called back. If this Ring Back call is answered a new call will be automatically placed towards the destination extension. If the Ring Back is not answered then the Ring Back is cancelled.

---

## Transfer

Type the number of the person you wish to call into the Number field and click the call button, the number will then be called. See also [Transfer a Call](#).

- **Number:**  
The telephone number (or Short Code) that will be dialed when the Transfer Button is selected. Note that the status of the target extension/User is displayed above the number field.
- **Name:**  
This is the name associated with number to be called. The name could be a User or Hunt Group or Directory Entry. The name will be automatically entered when a match is found with the digits entered in the Number field. Alternatively enter the name in the Name field and if a match is found the number required is automatically entered. As you enter each letter of the name the Directory List (if used) is automatically truncated to show only those names that match the letters typed in the Name field.
- **Tag:**  
The Tag Field can be used to add messages to the outgoing call (internal only). See also [Tag a Call](#). Not supported for VoIP extensions.
- **Directory List:**  
A list of names and numbers configured on the PBX and in your own personal Directory (Phone Manager Pro only). You can select whether to display/search either Users, Hunt Groups or PBX Directory Entries by checking the **Show Users**, **Show Hunt Groups** or **Show Directory** check boxes. Phone Manager directory entries are always shown.
- **Transfer:**  
Click this button to Transfer the call to the number entered.
- **Cancel:**  
On selecting the Cancel Button all information entered is lost. You are then returned to the [Main Window](#).
- **Help:**  
Click this button to launches the Phone Manager Pro Help Text.
- **Voicemail:**  
The Voicemail button calls an internal User's Voicemail rather than calling the User direct.
- **Blind Transfer:**  
The Blind Transfer button will transfer the call to the destination entered in the Number field without waiting for the destination to be answered.
- **Park For:**  
If the extension called is busy, this button will place the caller on hold. The call will be automatically presented after 45 seconds or when the busy extension becomes free. Details of the returned call, (Timeout) or (Free), will appear in the Tag field.

## Account Code

The Account Code form appears if you have either selected **Account Code** from the **Functions** menu or you have pressed **F3**.

This form allows you to assign an Account Code to your current call. Please refer to your System Administrator for a list of valid Account Codes.

See also [Using Account Codes](#).

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## Absent Status

This dialogue box will allow you to assist internal callers when you are not at your desk. The information entered will appear in their Call dialogue box when a call is made to your extension.

For certain phones with suitable displays, the text will also appear on the display of the phone and on those phones that call.

From the list box select the message required, eg. On Holiday Until or Back Tomorrow. Then type any additional information in the box below so that the message will read in full, eg. "On Holiday until Monday"














You can then use this dialogue box to select Do Not Disturb and/or Forward Unconditional.

The Absent Message will appear in the title bar of your Phone Manager Pro and in the Call dialogue box when a call is made to your extension.







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## Call Handling Icons

The icons on the right hand side of the main Phone Manager Pro window will help you to make and receive calls as follows:

-  **Make a Call:** See [Make a Call](#).
-  **Answer a Call:** See [Answer a Call](#).
-  **Set Ringback when Free:** See [Set Ringback When Free](#).
-  **Place a Call on Hold:** See [Place Call On Hold](#).
-  **Add a Call to a Conference:** See [Create a Conference Call](#).
-  **Hangup a Call:** See [End a Call](#).
-  **Transfer a Call:** See [Transfer a Call](#).
-  **Complete a Transfer**
-  **Configure Preferences:** See [Configure Preferences](#).
-  **Speaker Volume:**  
Click on drop down to adjust the PC speaker volume. Click to turn mute on/off. Grayed out except for VoIP users. See [VoIP Operation](#).
-  **Microphone Volume:**  
Click on drop down to adjust the PC microphone volume. Click to turn mute on/off. Grayed out except for VoIP users. See [VoIP Operation](#).
-  **Book a Conference:** This function will allow you to book a IP Office Conferencing Center Conference. Only available if permission is specified by your System Administrator.
-  **Join a Conference:** This function will allow you to join a IP Office Conferencing Center Conference.

If Phone Manager is being used in Agent Mode (Phone Manager Pro only) an additional set of icons appear:

-  **Busy Wrap Up:** Allows you to go in and out of busy wrap-up state. The Status tab shows "Busy Wrap Up" when in that state.
- If the **Busy Wrap Up** icon is grayed out () , this mean that you are currently not a member of any group, see **Select Group** below. If all your group memberships are removed or disable when in busy-wrap up, Phone Manager will continue to display **Busy Wrap Up** until restarted.
-  **Busy Not Available:** Allows you to go in and out of busy not available state. The Status tab shows "Busy Not Available" when in that state.
-  **Select Group:** Displays the groups for which you are an available member when not in **Busy Wrap Up** or **Busy Not Available**. See [Agent Mode](#).
-  **Start Recording:** Click on the icon to Start Recording a call.
-  **Stop Recording:** Click on the icon to Stop Recording a call.

## Function Keys

- **F1 - Call**  
See [Call](#).
- **F2 - Transfer**  
See [Transfer](#).
- **F3 - Account Code**  
See [Account Code](#).
- **F4 - Hold Call**  
See [Place Call On Hold](#).
- **F5 - Record**  
Not available on all systems.
- **F6 - Absent Status**  
See [Absent Status](#).
- **F9, F10, F11, F12 - Park/Unpark**  
See [Park a Call](#) and [Unpark a Call](#).
- **Enter - Answer**  
See [Answer a Call](#).
- **Esc - Clear**
- **End - Hangup**  
See [End a Call](#).

Note: When Phone Manager is in Agent Mode, the roles of the **F1** and **F3** functions are swapped.

---

## Hands Free Operation

The Phone Manager Pro application can be used in conjunction with a Hands Free phone and/or headset.

When using a Hands Free phone and/or headset the 'phone' should be left off-hook permanently. The "Off Hook Operation" option must be set under the **Telephone** tab of the [Configure Preferences](#) dialogue box. All calls are answered, transferred, queued etc by clicking the appropriate [Call Handling Icons](#) and by following the instructions provided in the [Make a Call](#) help text.

Note that under normal operation nothing is heard in the headset when the 'phone' is left in the off-hook state. Ringing Tone is heard in the headset when an incoming call is presented to the extension. Clicking the Answer icon at this point answers the call (equivalent to picking up a normal phone). When making an outgoing call Dial Tone is heard when the Call button in the [Call](#) dialogue box is pressed.

---

## VoIP Operation

The System Administrator can create VoIP extensions. When Phone Manager Pro is associated with a VoIP extension number and **Enable VoIP** is selected in the Phone Manager preferences, two additional controls become active.



- Click the drop-down symbol to display a volume slider.
- Click the main body of either icon to turn mute on/off. An example of a muted icon is shown below.



This type of operation is also called IP Soft Phone. Note that requires that the PC has a correctly setup speakers and microphone. Note also that it is not available under Windows 95 or Phone Manager Lite.

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## Agent Mode Operation

Phone Manager Pro only. Agent Mode allows Phone Manager to be used as a call center tool. It allows you to perform a number of call center functions without needing a specially designed call center telephone\*, ie. one with dedicated keys for functions such as busy wrap up.

Agent Mode is enabled through the **Agent Mode** tab within **Configure | Preferences**.

- Note: Logging on and logging off is separate from Agent Mode and is enabled through the **Configure | PBX** menu. See [Getting Started](#).

In Agent Mode:

- Phone Manager displays **Busy Wrap Up**  and **Busy Not Available**  icons allow you to go into those states.
- Use **Busy Wrap Up** when you temporarily need to stop receiving calls when you 'wrap up' the details of the call just finished.
- Use **Busy Not available** when you need to stop receiving calls for some other reason.
- The **Select Group**  icon show the groups for which you will receive calls when not in Busy Wrap Up or Busy Not Available.
- The **Start**  and **Stop**  icons are available.
- The **Account Codes** tab allows you to make calls with the appropriate account code or to easily apply an account code to a current call.
- In Agent Mode, the functions of the F1 and F3 keys are swapped. F1 becomes 'account code' and F3 becomes 'call'.


\*We still recommend that only Avaya telephones are used in call centers. Most standard telephones are not designed for normal call center conditions, ie. the possible high number of on-hook, off-hook actions and key presses. Whilst standard telephones are okay in most domestic and business situations, they are likely to fail frequently in a call center environment.

## IP Office Conferencing Center

The Phone Manager can be integrated with IP Office Conferencing Center. This allows you to book a conference and join a web conference.

To use the IP Office Conferencing Center system Internet Explorer 5.5 or above is required. It is only available if permission is specified by your System Administrator and the IP Office Conferencing Center system is available to you.

- To book a conference click the  icon.
- This will automatically open Internet Explorer.
- Enter your **User ID** and **Password** as supplied by your IP Office Conferencing Center Administrator.
- Click **Login**.

- To Join a Conference click the  icon.
- This will automatically open Internet Explorer.
- Enter the **Conference ID** and **PIN No:** as supplied by the host booking the conference.
- Click **Login**.

To connect to an Audio Conference, call the Conference Bridge number and follow the audio prompts. Alternatively, if Voice Conference Notification (VCN) is set by the conference host, the IP Office Conferencing system will call you inviting you to join the conference.

---

## Help Menu

The Help menu gives access to a number of Help options:

- **Contents**  
This function will open the Phone Manager help system at the contents page.
- **Search for Help on**  
This function will open the search tool within the Phone Manager help system.
- **About...**  
This displays the version of the Phone Manager application.
- **Product Tour**  
This function will launch an interactive Product Tour allowing you to investigate and learn about the Phone Manager application.
- **Video Tutorials**  
This function will list a number of Video Tutorials. Each tutorial provides an interactive demonstration of the capabilities of the Phone Manager application.

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# Configuration

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## Configuring your Preferences

You can decide how your calls are going to be handled by setting your personal preferences as follows.



- [Take Your Calls from Another Extension.](#)
- [Forward Your Calls to Another Location.](#)
- [Set Do Not Disturb \(DND\).](#)
- [Set a Do Not Disturb Exception Number.](#)
- [Transfer Back to Forwarded Extension.](#)
- [Turn Call Waiting On/Off.](#)
- [Turn Voicemail On/Off.](#)
- [Turn Voicemail Ringback On/Off.](#)
- [Turn Off Hook Operation On/Off.](#)
- [Select the Tabs to Show in Call History.](#)

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## Speed Dials

Speed Dials allow you to save regularly used internal and external numbers for future use. See also [Create a Speed Dial.](#)

A Speed Dial can also act as a Busy Lamp Field in the following manner:

-  If the user/extension is busy the Speed Dial icon has a red circle with a white cross on it (internal extensions only).
-  If the user/extension has Do Not Disturb set, the Speed Dial icon has a blue circle with a white cross on it (internal extensions only).

If more than one Speed Dial is created for the same internal user, only one Speed Dial will act as a Busy Lamp Field. In order for the Busy Lamp Field feature to operate, your PC must be present on the same physical LAN as the PBX - please refer to your System Administrator.

---

## Edit Speed Dial Dialogue

The **Edit Speed Dial** form shows the following options:

- **Name:** The name you wish to associate with the Speed Dial icon.
- **Number:** The telephone number (or Short Code) that will be dialed when the Speed Dial icon is selected. For internal users and groups the user or group name can be used (without quotation marks).
- **PIN:** The PIN required to make a call using the Speed Dial. This field allows you to pre-enter the PIN for this Speed Dial.

## Directory Entries

Phone Manager Pro only. Directory Entries are used to store regularly dialed internal or external numbers. Directory Entries appear in the [Call](#) dialogue box (if the **Show Directory** option is checked) for quick dialing.

Directory Entries can also be used to match the CLI or DID of incoming calls to a name. This can be used to play a media file or display a text file. Phone Manager attempts to match the incoming CLI first and if no match exists it then looks for a match to the DID.

---

### Create a Directory Entry

1. On the [Configure Menu](#), select Directory.
2. Click the **New** button.
3. Type the telephone or extension number into the **Number** box.
4. Type the name to be associated with the above number into the **Name** box.
5. Click **OK** or press **Enter**.
6. Click **Close** to exit the Configure Directory dialogue box.

---

### Edit a Directory Entry

1. On the [Configure Menu](#), select Directory.
2. Select the Directory Entry to be changed.
3. Click the **Edit** button.
4. Edit the Directory Entry as required.
5. Click **OK** or press **Enter**.
6. Click **Close** to exit the Configure Directory dialogue box.


---

### Delete a Directory Entry

1. On the [Configure Menu](#), select Directory.
2. Select the Directory Entry required.
3. Click the **Delete** button.
4. Click **Close** to exit the Configure Directory dialogue box.

---

### Make a Call using a Directory Entry

1. Click .
2. Ensure the **Show** Directory option is checked.
3. Select the Directory Entry required.
4. The phone number and name will be automatically entered in the Number and Name fields
5. Click Call.

---

## Create a Directory Entry from an Existing Call

1. Right click the Call in the [Call History](#) pane.
2. Select **Add to Directory**.
3. This will open the Directory Entry dialogue box.
4. Make changes if required.
5. Click **OK** or press **Enter**.
6. Click **Close** to exit the Configure Directory dialogue box.

---

## Create an MS Outlook Contact from an Existing Call

1. Right click the Call in the [Call History](#) pane.
2. Select **Add to Outlook**.
3. An MS Outlook Contact form will open with call information entered.
4. Complete the Contact form.
5. Click **Save and Close** checkbox on the Outlook Contact form.

*Please note that the above feature requires Microsoft Outlook to be installed on your PC and the correct configuration of MAPI.*

---

## Default Sizing

This option is used to return the Phone Manager window to its original size.

- Clicking the **Yes** button will resize the Phone Manager window to its original, default, size.
- Clicking the **No** button cancels the resizing request and returns you to the Phone Manager window.



---

# Call Handling


---

## Make a Call

1. Dial the number required.
  2. The outgoing call will appear in the [Call Status](#) pane.
  3. The Call Status pane will then indicate when the call has been answered.
  4. When you have finished your call, the call will disappear from the Call Status pane.
  5. The call will now appear in the [Call History](#) pane under the [Out](#) tab.
- Note: If a call to an internal User is not answered within the No Answer Time, and the User has Voicemail enabled, you will be prompted to leave a message. When you have finished the call, the call information will appear in Call History under the Out tab. Double click the call information to redial the number.

## Hands Free



1. Click  or press **F1** or on the [Functions Menu](#), click **Call**.
2. Enter telephone number or extension in [Call](#) dialogue box.
3. Click the Call button or press Enter.
4. The outgoing call will appear in the [Call Status](#) pane.
5. The Call Status pane will then indicate when the call has been answered.
6. When you have finished the call, the call will disappear from the Call Status pane.
7. The call will now appear in the [Call History](#) pane under the Out tab

## PIN Restrictions


The Phone Manager release 2.1 introduces a feature called PIN Restrictions (PIN). PIN restrictions work by making the caller enter a PIN before the call is connected. PIN restrictions can be associated with types of number being dialed e.g. International numbers, External numbers

PIN restrictions will be performed from:

- Making A Call
- Speed dials
- Account code Speed dials

### Making a Call



1. Click  or press **F1** or on the [Functions Menu](#), click **Call**.
2. Enter telephone number or extension in [Call](#) dialogue box.
3. Click the Call button or press Enter.
4. When prompted to do so enter the PIN number.
5. When a valid PIN code is entered the call will be connected. When an invalid PIN code is entered an error message will be displayed.
6. Re-enter the PIN as prompted. If the problem persists Contact your System Administrator.
7. The outgoing call will appear in the [Call Status](#) pane.
8. The Call Status pane will then indicate when the call has been answered.
9. When you have finished the call, the call will disappear from the Call Status pane.
10. The call will now appear in the [Call History](#) pane under the Out tab.

### Speed Dials

1. In [Call History](#), select the Speed Dials tab.
2. Double-click the Speed Dial required or right-click the Speed Dial required and select **Call**.
3. When a valid PIN is entered against the Speed Dial the call will be connected. When an invalid PIN is entered an error message will be displayed and you will be prompted to re-enter the PIN. If the problem persists Contact your System Administrator.
4. The Call will appear in [Call Status](#)
5. Continue as per [Make a Call](#).




---

## Receive a Call

1. The incoming call will appear in [Call Status](#).
2. Pick up handset to answer call.
3. The Call Status pane will then indicate when the call has been answered.
4. When you have finished the call, the call will disappear from the Call Status pane.
5. The call will now appear in [Call History](#) under the In tab.

---

## Place Call On Hold

1. Click .
2. [Call Status](#) will then indicate that the call is on hold.


---

## Take a Call Off Hold

Click the call in the [Call Status](#) pane.

---

## End a Call

Click  or replace handset or press **End**.

---

## Redial a Number

1. Double click the call in [Call History](#) or right click.
2. Choose Call Number Back.

---


## Callback an Unanswered Incoming Call

1. If a call is not answered within the No Answer Time, the incoming call will appear in Call History under the [Missed](#) tab.
2. Double click the Call to return the call.
3. If the caller has left a Voicemail message, the [Messages](#) tab in the Call History pane will indicate you have one new message.
4. Double click on the Voicemail information to listen to your message or right click within the Messages tab and select Call Voicemail.

## Tag a Call

Identifying a call by giving the call a descriptive tag. The tag will appear on the extension called if it has a suitable display. If you park the call using Phone Manager the selected Park Button will show the Tag text.

Calls from a VoIP extension cannot be tagged.

1. Click  or press **F1**.
2. Enter the number and name as per [Make a Call](#).
3. In the Tag box type in the description.
4. Continue the call as per Make a Call.
5. This text will appear with the call under the Tag column in the [Call Status](#) pane.

---

## Clear a Call



If you have a call on hold and start to make another call and then change your mind, you can use Clear to cancel the outgoing call.

1. In the [Functions Menu](#), select **Clear** or press **Esc**.

---

## Transfer a Call



You can transfer a call to an internal or external telephone number. This is a supervised transfer, ie. you can talk to the transfer target before completing the transfer. You can only use this method to transfer calls you have answered.

1. Click  or press **F2**.
2. Enter the transfer number into the **Number** box.
3. Select **Transfer** or press **Enter**.
4. The original call will be put on Hold.
5. Once the call has been answered you can talk with the transfer target.
  - To transfer the call, either press **Home** or replace the handset or click on the Complete Transfer icon .
  - To cancel the transfer and reconnect the held call press **End**.
6. The Call will now appear in the [Call History](#) pane.

---

## Blind Transfer a Call


You can transfer a call without waiting for a response from destination number. You can use this method to transfer a call when it is till ringing your extension.

1. Click  or press **F2**.
2. Enter the transfer number into the **Number** box.
3. Click the Blind Transfer button or click  or replace your handset before the call is answered.

---

## Transfer a Call to Another User's Voicemail


If a caller wishes to leave a message for a User, you can transfer the caller directly to that User's Voicemail.

1. Click  or press **F2**.
2. Enter the number into [Transfer](#) dialogue box.
3. Click the **Voicemail** button.
4. The incoming caller will be transferred to the User's Voicemail.

---


## Tag a Transferred Call

Identify a transferred call with a text description.

1. Click  or press **F2**.
2. Enter the number and name as per [Transfer a Call](#).
3. In the Tag box type in the description.
4. Continue the transfer as per [Transfer a Call](#).
5. This text will appear with the call under the Tag column in the [Call Status](#) pane.

---

## Create a Conference Call

1. Make an outgoing call as per [Make a Call](#) or answer an incoming call.
2. [Place Call On Hold](#).
3. Place a call to a third party or answer another incoming call.
4. Place the current caller on Hold.
5. Repeat steps 3 and 4 until all members that are to join the conference are on hold
6. Click  or from the [Functions Menu](#) select Conference
7. The [Conference](#) tab will appear in the [Call History](#) pane

---

## Speak Privately to a Member of a Conference

Currently not supported.

---

## Remove a Member from a Conference

Right click the Conference member in the Conference tab and select Hang Up.

## Collect Your New Voicemail Messages

1. Select the Messages tab on the [Call History](#) pane.
2. Double click on the Voicemail box you would like to access (this will either be your personal Voicemail box or the Voicemail box for the Hunt Group of which you are a member) or Right click and select Call Voicemail.
3. If the phone is On-Hook it will ring once the Voicemail Server has been contacted. Pick up the phone and listen to your messages.
4. If the phone is already in the Off-Hook state you will be connected to the Voicemail server as soon as it is located.

---

## Reclaim a Call

After you have transferred a call to another number you can reclaim the call back to your own phone.

1. In the [Functions Menu](#), select **Reclaim** or press the Subtract key (Number pad minus sign).

Note: You can only reclaim a call which has been presented to a Phone Manager user.

---

## Park a Call

1. In the [Functions Menu](#), select **Park/UnPark #** or click the required Park button in the [Call Park Area](#).
2. The dialed number will appear on the relevant parking icon.
3. The caller will be placed on hold
4. You can now make another call or take an incoming call.

---

## Unpark a Call

1. In the [Functions Menu](#), select Park/UnPark # or in the [Call Park Area](#) click on the Park button displaying the parked call.
2. You will be connected to original caller.

---

## Tag a Parked Call

Identify a parked call with a text description.

1. Before parking the call, right click on the Park button required.
2. Enter the description in the [Call Tag Form](#).
3. The call will be parked and the description will appear on the Park button.

---


## Call Tag Form

Use this form to enter the description you wish to appear on the Park button to identify this call.

---

## Answer a Call

You will be notified that there is an incoming call to be answered by either Phone Manager Pro popping to the front of your screen, a ringing sound from your PC speakers, the Phone Manager Pro Task Bar Icon flashing or the fact that your phone is ringing. Use the Answer Incoming Call button to answer the waiting call.


1. The incoming call will appear in the [Call Status](#) pane.
2. Click  or select incoming call by pressing the Enter key or in the Functions Menu select **Answer**.

Note: The icon is only illuminated if Off-Hook Operation is set.

---

## Answer a Call Waiting

If the Call Waiting option has been set under [Configure Preferences](#), you will be notified that there is an incoming call to be answered. Use the Answer Incoming Call button to answer the waiting call.


1. The new incoming call will appear in the [Call Status](#) pane.
2. Click  or select new incoming call by pressing the Enter key or in the [Functions Menu](#) select Answer.
3. The original call will be put on hold.
4. When you have finished this call, you will automatically be put through to the previous call.

Note: The Answer icon is only illuminated if Off-Hook Operation is set.

---

## Set Ringback When Free

1. If the internal extension entered in the Number field of the Call dialogue box is busy the Ringback button will now be available for selection.
2. Click the Ringback button and the Call dialogue box will disappear
3. As soon as the destination extension becomes free your phone will ring. The call to the selected extension will only be made when you pick up your ringing phone.

Alternatively, the Ringback icon  will appear in the [Main Window](#) to allow you set Ringback When Free if you are dialing a busy extension from your handset and your call does not go through to Voicemail.

---

## Set an Absent Message

1. From the [Functions Menu](#) select **Absent** or press **F6**.
2. From the list box select the message required, eg. **On Holiday Until** or **Back Tomorrow**.
3. Type additional information required in the box below so that the message will read in full, eg. **"On Holiday until Monday"**.
4. Select whether you wish your extension to be set to Do Not Disturb and/or Forward Unconditional. (Forward option only available if Forward Number is set)
5. The Absent Message will appear in the title bar of Phone Manager Pro and in the Call dialogue box when a call is made to your extension.

## Making a Call with an Account Code

1. From the Functions menu select Account Code.
2. Complete the Call dialogue as per [Make a Call](#).
3. In the Account Code field enter the code to be assigned to this call (please refer to your System Administrator for a list of valid Account Codes).
4. Click **Call** and the call will be made
5. At the end of the call the Account Code will then be recorded with the call information in an application called Call Logger (please refer to your System Administrator).

If the wrong account code is entered a warning message will be given, however this does not prevent the call from being made.

If you receive the "Call Failed - Account Code Required" message each time you make an outgoing call without an Account Code this means your User account has been configured to ensure you always assign an Account Code to an outgoing call - for further information please refer to your System Administrator.

---

## Delete all Calls from the Call History

1. Right click within the [Call History](#) pane.
2. Select **Clear All Tabs**.

---

## Working with Queues

Phone Manager Pro only. Calls to a Hunt Group will be held in a queue when all extensions that are members of the Hunt Group are busy.

If you are a member of a Hunt Group, for example "Reception" or "Sales", you will be automatically presented with calls to this group. The name of the Hunt Group will be displayed in the To field in [Call Status](#).

You can also monitor the number of calls being held in a queue for a particular Hunt Group. In the [Queue ID](#) tab under [Configure Preferences](#) you can select two Hunt Groups you wish to monitor. The Hunt Group must already exist on the System and must have Queuing enabled - please refer to your System Administrator. Each drop down box will give a list of valid Hunt Groups to choose from.

The [Queue](#) tab will then appear in [Call History](#) and displays two Queue monitors that can be used to indicate the number of calls currently queued for the configured Hunt Groups. Each call held in a queue is indicated by a blue box. When the mouse pointer is moved over a Queue monitor the number of calls in the queue is displayed in the Hint Box.

### To receive a queued call

1. If you are a member of a Hunt Group a queued call will be automatically presented in [Call Status](#) and the name of the Hunt Group will be displayed in the To field. The call can be answered in the normal way.
2. To answer a call from a specific Queue double click on the Queue name or from the Functions Menu, select PickupQueue1 or PickupQueue2.

### To refuse a queued call

If you double click on the wrong Queue or are presented with a queued call that you are temporarily unable to deal with you can use the Clear (Esc) function to refuse the call and return it to the queue.


---

# How To


---

## Take Your Calls from Another Extension

If you wish to take your calls from another location, you can instruct the PBX to pass your calls to another internal or external number. This option must be set at your extension.

1. Click .
2. Select the [Forwarding](#) tab.
3. Enter the required number into the Follow Me to **Number** box.
4. Click **OK** or press **Enter**.
5. The title bar of Phone Manager Pro indicates that **Follow to** has been set.


### To cancel

1. Click .
2. Select the [Forwarding](#) tab.
3. Remove the extension number from the **Follow Me to Number** box.
4. Click **OK** or press **Enter**.


---

## Forward Your Calls to Another Location

Your calls can be answered at another location by forwarding your calls to an internal or external number. You can decide whether all your calls are to be forwarded or only when your extension is busy or only when your extension is not answered (the No Answer Time is configured by your System Administrator). If you are a member of a Hunt Group you can also forward Hunt Group calls to this location. See also [Transfer Back to Forwarded Extension](#)

1. Click .
2. Select the [Forwarding](#) tab.
3. Enter the internal or external number into the **Forward Number** box.
4. Select the Forward option you require (click in box):
  - **Forward Unconditional** - forward all calls (except Hunt Group calls)
  - **Forward On Busy** - forward calls when your phone is busy.
  - **Forward On No Answer** - forward call when your extension is not answered.
  - **Forward Hunt Group calls** - forward all Hunt Group calls
5. Click **OK** or press Enter.
6. The title bar of Phone Manager Pro indicates that a Forward option has been set.

### To cancel


1. Click on .
2. Select the **Forwarding** tab.
3. Remove the Forward option by clicking in the relevant box to remove the check
4. The number in the **Forward Number** box can be left for future use or deleted.

5. Click **OK** or press **Enter**.


---

## Set Do Not Disturb (DND)

This feature will ensure your phone does not ring when incoming calls are received. The caller will get the Busy tone or be passed to Voicemail.

1. Click .
2. Select [Do Not Disturb](#) tab.
3. Select Do Not Disturb option (click in box).
4. Click **OK** or press **Enter**.
5. The title bar of Phone Manager Pro indicates that DND is set.


### To cancel

1. Click .
2. Select [Do Not Disturb](#) tab.
3. Remove the check from the Do Not Disturb option (click in box).
4. Click **OK** or press **Enter**.
5. The DND indicator in the title bar of Phone Manager Pro is removed.


---

## Set a Do Not Disturb Exception Number

You may be expecting an important call and wish to ensure that the call is answered even when you have Do Not Disturb set. This incoming number can be entered as a Do Not Disturb Exception.

1. Click .
2. Select the [Do Not Disturb](#) tab.
3. Type the extension number in the DND Exception Number box (the variables "N" or "x" can also be used - N = any number of digits, eg. 01923699N and x = one digit, eg. 22x).
4. Click the **Add** icon.
5. The number will appear in the **DND Exception List**.
6. Click **OK**

### Remove a Do Not Disturb Exception

1. Click .
2. Select the **Do Not Disturb** tab.
3. Select the number to be removed from the **DND Exception List**.
4. Click the **Remove** button.
5. Click **OK**

---

## Transfer Back to Forwarded Extension

If Forward Unconditional is set a forwarded call can not be transferred back to the original destination. The Forward on Busy and Do Not Disturb feature can be used to enable this facility.




For example, you wish to forward all your calls to extension 203 however you are expecting an important call and wish that call to be transferred back to your extension.

1. In **Configure Preferences** set **Forward On Busy** to **203**.
2. Set **Do Not Disturb**.
3. Enter extension 203 as a Do Not Disturb Exception.
4. Now when a call is received by extension 203 it can be transferred back to your extension.

---

## Turn Call Waiting On/Off


The Call Waiting feature will allow you receive a incoming call when in the process of another call. A beep will be heard in the handset and [Call Status](#) will show the call information. Click on the second call in Call Status to answer the call and this will automatically place your current call on hold. You can then swap between the calls by clicking on the call you require.

1. Click .
2. Select the [Telephone](#) tab.
3. Select the **Call Waiting** option (click in the box).

---

## Turn Voicemail On/Off


Voicemail will allow incoming callers to leave a message if your extension is busy or not answered after the No Answer Time.

1. Click .
2. Select the **Voicemail** tab.
3. Select the **Voicemail** option (click in the box).

---

## Turn Voicemail Ringback On/Off


Your telephone will ring to you to indicate you have a new message.

1. Click .
2. Select the Voicemail tab.
3. Select the Voicemail Ringback option (click in the box).


---

## Turn Off Hook Operation On/Off

Off Hook operation allows the phone to be controlled via the Phone Manger Pro without having to physically lift the handset on or off the cradle. When using a Hands Free phone and/or headset the 'phone' should be left off-hook permanently.

1. Click .
2. Select the [Telephone](#) tab.
3. Select the **Off Hook Operation** option (click in the box).

## Select the Tabs to Show in Call History

1. Click .
2. Select the [Phone Manager](#) tab.
3. Select the options required.
  - **Show all:** displays call information for all incoming and outgoing calls.
  - **Show in:** displays call information for incoming calls.
  - **Show out:** displays call information for outgoing calls.
  - **Show missed:** displays call information for unanswered incoming calls.
  - **Show messages:** displays number of messages in Voicemail.

---

## Create a Speed Dial

1. In the [Call History](#) pane, select the Speed Dials tab.
2. Right click within the **Speed Dials** tab.
3. Select **New**.
4. The **Edit Speed Dial** dialogue box will open.
5. Enter a name into the **Name** box.
6. Enter the number into the **Number** box.
7. Enter the **PIN** if required (Please refer to your System Administrator).
8. Click **OK**.
9. The new Speed Dial icon will appear in the **Speed Dials** tab.

---

## Edit a Speed Dial

1. In [Call History](#), select the Speed Dials tab.
2. Right click the Speed Dial you wish to change
3. Select **Edit**.
4. The **Edit Speed Dial** dialogue box will open.
5. Edit the Speed Dial as required.
6. Click **OK**.

---

## Delete a Speed Dial

1. In [Call History](#), select the Speed Dials tab.
2. Right click the Speed Dial required
3. Select **Delete**.

---

## Make a Call Using a Speed Dial

1. In [Call History](#), select the Speed Dials tab.
2. Double-click the Speed Dial required or right-click the Speed Dial required and select **Call**.
3. The Call will appear in [Call Status](#)
4. Continue as per [Make a Call](#).

---

## Create a Speed Dial to a User's Extension

1. In the [Call History](#) pane, select the Speed Dials tab.
2. Right click within the **Speed Dials** tab.
3. Select **Add User**.
4. Select the User required.
5. The new Speed Dial icon will appear in the **Speed Dials** tab. Note: The Speed Dial number uses the user's name rather than number.

---

## Create a Speed Dial While Creating a Directory Entry

1. Phone Manager Pro only. On the [Configure Menu](#), select Directory.
2. Click the **New** button.
3. Type the number into the **Number** box.
4. Type a name to be associated with this number into the **Name** box.
5. Click **Add Speed**.
6. Click **OK**
7. Click **Close** to exit the Configure Directory dialogue box.
8. The speed dial will appear in the Speed Dials tab

---

## Using Account Codes

Account Codes allow your System Administrator to track calls to specific external numbers. For example, a solicitor's office may wish to record the amount of time spent on calls to a client for billing purposes. Each client is given an Account Code and that code is used when making a call.

A key feature of Phone Manager is that it allows the use of text account codes rather than just numbers.

Account codes entered with calls are only recorded by the system if they match an account code already configure on the system. Please refer to your System Administrator for a list of valid Account Codes.

---

## To Make a Call Using an Account Code

1. From the **Function** menu select Account Code, or press **F3**
2. In the **Account Code** box enter the appropriate code.

---

## To Assign an Account Code to a Call in Progress

1. To assign an Account Code to a call already in progress, select **Account Code** from the **Functions** menu or press **F3**.
2. Enter the appropriate Account Code in the dialogue box.

---

## Account Code Required

If you receive the following message each time you make an outgoing call without an Account Code, then your User account has been configured to ensure you always assign an Account Code to an outgoing call - for further information please refer to your System Administrator.

---

## Using an Account Code Once a Call is in Progress

1. From the Functions menu select Account Code

2. Enter the code to be assigned to this call in the Account Code box (please refer to your System Administrator for a list of valid Account Codes).

---

# System Administration

---

## Hints & Tips for System Administrators

1. When completing the [PBX Configuration Information](#) dialogue box a broadcast address, eg. 255.255.255.255, can not be used for the PBX Address.
2. The Call History tabs each display information on a maximum of 100 calls. The oldest record is then replaced.
3. [Park ID](#)'s can contain a maximum 9 characters.
4. If a particular feature does not appear to work, try closing and opening Phone Manager Pro. All configuration changes are saved when the application is closed. Phone Manager Pro will then look for all configuration on start up.
5. In order for the Busy Lamp Field feature of a [Speed Dials](#) to operate the PC running Phone Manager Pro must be connected to same physical LAN as the main system. This implementation provides resilient synchronized updates and greatly reduces the LAN performance requirements.
6. When Show Users is checked in the Call dialogue box this will give a list of Users configured on the PBX. If an entry has been made in the User's Full Name field this will be displayed in preference to the User Name. If particular Users are not to appear in this list select the "Ex Directory" option in the User's configuration form.

---

## Minimum PC specification for Phone Manager

- Pentium 266Mhz or above with 64MB RAM.
- Windows 95, 98, NT4 (SP6) or Win2000.
- Sound card if audio features required.
- 50 MB of free disk space.

---

## Minimum PC specification for Phone Manager VoIP

- Pentium 400Mhz or above (550Mhz recommended) with 128MB RAM.
- Windows98, NT4SP6 or Win2000.
- Sound card and microphone installed.
- 50MB of free disk space.



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