

# Help Contents for CallAudit

CallAudit for Windows is a software program that audits incoming telephone calls by using the MODEM or similar serial device in your computer. It can provide caller number and name information using Caller ID information that is supplied by your telephone company.

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## Introduction

CallAudit is a Microsoft Windows compatible software program that audits incoming telephone calls by using your computer hardware. CallAudit provides caller information, both number and name, for incoming telephone calls using Caller ID. Caller ID is a service provided by the telephone company to give you information on the identification of persons calling your telephone number. When your telephone rings, the Caller ID information is supplied as a series of special codes between the first and second rings. Although Caller ID is available in most all states and areas, it is an additional service that must be purchased from your local telephone company.

CallAudit uses a MODEM or serial device attached to your computer to obtain Caller ID information supplied by your telephone company. When an incoming call occurs, a new call item is added to the Incoming Calls window. The new line of data shows the time and date of the call, and when available, the Caller ID information. CallAudit includes a relational database where all call information is stored. This database includes areas for your most recent calls, all past calls, and a telephone number area in which you can insert additional information about your callers.

The primary features of CallAudit include:

- Audit incoming calls
- Audit outgoing calls made using CallAudit
- Display Caller ID information for all calls
- Complete history of all calls received or made
- Telephone number database including sound and Notepad data
- Ability to place calls using the MODEM dial out features
- Speed dial list for quick access to frequent calls
- Audio prompts for key program events
- Report generation from the CallAudit database
- Import/Export capability
- Complete printing support

CallAudit is bundled in a variety of forms and versions for different types of Caller ID capable hardware. The features and capabilities of the different CallAudit versions are highlighted in the CallAudit Versions help section.

## Caller ID Service

Caller ID is a telephone company service to provide information on the identification of persons calling your telephone number. When someone calls your number, your telephone begins to ring. The Caller ID information is provided by the telephone company as a series of special codes between the first and second rings. The information includes the time and date of the call, the telephone number of the caller (see below for exceptions), and depending on your Caller ID service, additional data in some areas.

CallAudit uses this Caller ID information to provide detailed information on your incoming calls.

**Without Caller ID from your telephone company CallAudit cannot** determine the telephone number of incoming calls.

**CallAudit also requires the use of a MODEM or other serial device that supports Caller ID.** If your MODEM or serial device does not support Caller ID, then the caller identification information supplied by the telephone company will not be available to the CallAudit software.

In some areas the telephone company provides what is called Caller ID+ or Caller ID name service. In these areas both the telephone number and name of the calling party are supplied. CallAudit software is compatible with Caller ID+ service and can use the name information supplied if your telephone company and MODEM hardware support it.

Note: Recent FCC changes have resulted in the implementation of Nationwide Caller ID in most areas of the US. Each telephone company is handing the Caller ID name somewhat differently. Some telephone companies will send the true name of the caller as if it were a local caller. Other telephone companies will send the City and State (separated by a comma) of the caller in the name field. Contact your local telephone company to see how this is handled for your area.

Caller ID information is provided by the telephone company in two different formats. Single Message Format is the simplest and is supported by all Caller ID capable MODEMs and devices. Multiple Message Format, which is considerably more complicated, is used to supply additional Caller ID information such as caller name identification. Multiple Message Format is not supported by all hardware vendor MODEM products. If your telephone company uses Multiple Message Format data, contact your MODEM manufacturer to determine if your hardware can support this standard.

Included in [Appendix A](#) is a list of the current known vendor devices that CallAudit can support. In general, many current MODEM products that support the Rockwell MODEM standards will support Caller ID. Other serial devices also support Caller ID in different ways. See chapter 7.0 for more details on configuring you MODEM or serial device for use with CallAudit.

Each telephone company has an area in which they support Caller ID. The extent of this area varies with each local telephone company. In some cases this may be multiple states, and in other cases only your local area. If you receive a call from someone from out of the calling area supported by your telephone company, the Caller ID software will indicate Out of Area. If you receive a call from someone what has their Caller ID information blocked, then you will receive only an indication that the caller is Private. See the [Private and Out Of Area Calls](#) section for more information about Private and Out of Area calls.

Different hardware and MODEM manufacturers provide products that can detect these codes and provide Caller ID information to the user. Although Caller ID is available in most all states and areas, it is an additional service that must be purchased from the telephone company. If you do not purchase this additional service, CallAudit will not be able to detect any Caller ID information.

# Installation And Setup

## System/Hardware Requirements

CallAudit is a software application that installs in your PC compatible computer. It uses a MODEM or other serial device in your computer to audit incoming telephone calls.

To use CallAudit you need the following :

- IBM-compatible personal computer with an 80386 or higher processor (including 80386SX).
- Hard disk with 1.5 megabytes of free space.
- Mouse or other compatible pointing device.
- EGA, VGA, or compatible display. (VGA or higher is recommended.)
- Four megabytes of random-access memory. (Six megabytes or more is recommended.)
- MS-DOS® version 5.0 or later, and Microsoft Windows version 3.1 or later.
- Caller ID capable MODEM or serial device connected to your telephone line
- Caller ID service from your telephone company

Other optional items include :

- Second MODEM for multiple telephone line support
- Microsoft windows compatible sound board and connected speakers

CallAudit has been tested successfully with Microsoft Windows 3.1, Microsoft Windows 3.11, Microsoft Windows for Workgroups 3.11, Windows 95, and Windows NT.

## Setting Up and Starting CallAudit

Use the Setup program (SETUP.EXE) to install CallAudit on your computer.

Use the following steps to set up CallAudit:

1. Start Microsoft Windows
1. Insert Disk 1
2. In the Windows Program Manager (or Explorer), choose the File menu
3. Choose Run menu option
4. Type a:\setup and press enter
5. Choose the OK button
6. Follow the instructions on the screen

During setup you will be prompted for user registration information and the software destination directory. The destination directory determines where on your supported hard disk(s) CallAudit will be installed. The default setting is C:\CALAUDIT which is satisfactory for most installations. You may change this location to either a different disk volume or destination directory name.

The CallAudit installation includes the basic software product (CALAUD32.EXE), a set of sound files (in the form of xxx.WAV) for use in sound prompts for telephone events, the initial CallAudit database (CALAUD32.MDB), and a number of Dynamic-link libraries (DLLs) that are required for program operation. Some of these DLLs will be installed in your Windows System directory, and others in the CallAudit directory.

If this installation is an update to your existing CallAudit software, a database conversion program will also automatically convert any existing data the first time you execute CallAudit. See the [Database Conversion](#) section for more information on this topic.

At the completion of CallAudit setup a new program manager group will be created. This will include icons for CallAudit startup, Help, and a RELNOTES.TXT file with the latest information for the product.

CallAudit uses a relational database (CALAUD32.MDB) to store incoming and outgoing call information. The default installation for this database is for shared access by multiple users and/or programs. This means that two or more programs or users can access the database at the same time. The CallAudit database software manages updates by locking portions of the database while updates are being

processed. This prevents two users or programs from trying to update the same portion of the database at the same time.

The CallAudit software requires a sufficient number of DOS file locks to perform this task. If you use Microsoft Windows for Workgroups (version 3.11 or later), this process is handled automatically for you. If you use Windows 3.1 you may have to make changes to your AUTOEXEC.BAT or CONFIG.SYS file. Microsoft Windows 3.1 should review the next section for these details.

### **Microsoft Windows 3.1 Users**

The DOS program SHARE.EXE is loaded at boot time and determines the number of shared file locks available to the system. SHARE.EXE can be loaded either in the AUTOEXEC.BAT file or the CONFIG.SYS file. In either case the number of locks should be set to at least a value of 100 locks. You should be sure this line is in one of your system files. Included below is an example of the line that needs to be added or edited for each of these system files. Additional information can be obtained about the SHARE.EXE program by using the DOS command HELP SHARE.

AUTOEXEC.BAT should contain a line like the following:

```
C:\DOS\SHARE.EXE /L:100
```

or CONFIG.SYS should contain a line like the following:

```
INSTALL=C:\DOS\SHARE.EXE /L:100
```

Note: ONLY ONE OF THESE SYSTEM FILES should be modified to include the SHARE.EXE program. If both files are modified system problems will result.

### **Configuring Disk Cache**

CallAudit uses the Microsoft Open Data Base Connectivity (ODBC) standards for all database software support. Any time a database update occurs (such as a telephone number update, processing during an incoming call, or adding a telephone number to the speed dial set) CallAudit makes calls to ODBC software. ODBC uses a significant amount of disk input/output to perform its functions.

ODBC software runs slow on many systems that have little or no disk cache defined. The DOS program SMARTDRV.EXE is used on many standard Windows systems to configure and manage cache memory. For example a system with little or no cache memory defined, may require as much as 10-12 seconds to add a telephone number to the CallAudit speed dial list. The same system will only take 1-2 seconds for the same operation when the cache memory is defined.

If you are running Windows for Workgroups, use the Control Panel Enhanced 386 section to define and configure cache memory for your system. If you are running Windows 3.1, add a line like the following to your AUTOEXEC.BAT file.

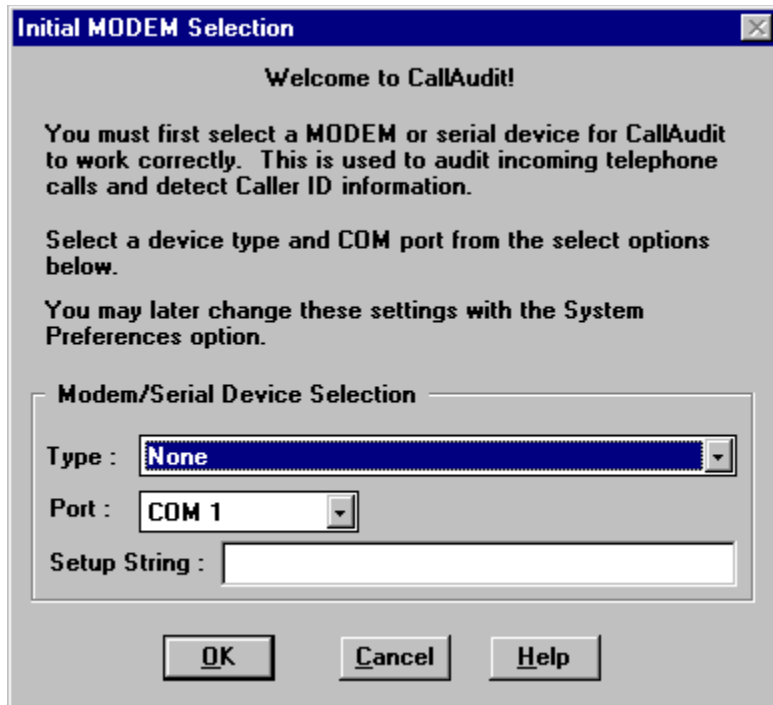
```
C:\DOS\SMARTDRV /V 1024 1024
```

The first number determines the amount of your RAM memory used for a memory cache while only DOS is running. The second number is the amount of RAM used when Windows is running. Consult your DOS help system for more information about SMARTDRV.EXE and other parameters that you may wish to use.

### **To start CallAudit**

1. In the Windows Program Manager, open the program group that contains the CallAudit icon.
2. Double-click the CallAudit icon.
3. CallAudit starts and displays the main window.

When you use CallAudit for the first time the following display will appear.



Follow the instructions on the screen to select a MODEM type and COM port. An available list of devices is provided as well as the list of COM ports for your PC.

A standard setup string is automatically provided for each MODEM type. This default setup string is usually all that is needed. Make changes to this string **ONLY** if you know your changes **WILL** work, and if the changes are necessary.

CallAudit cannot audit incoming or outgoing telephone calls unless a supported MODEM or serial device is selected.

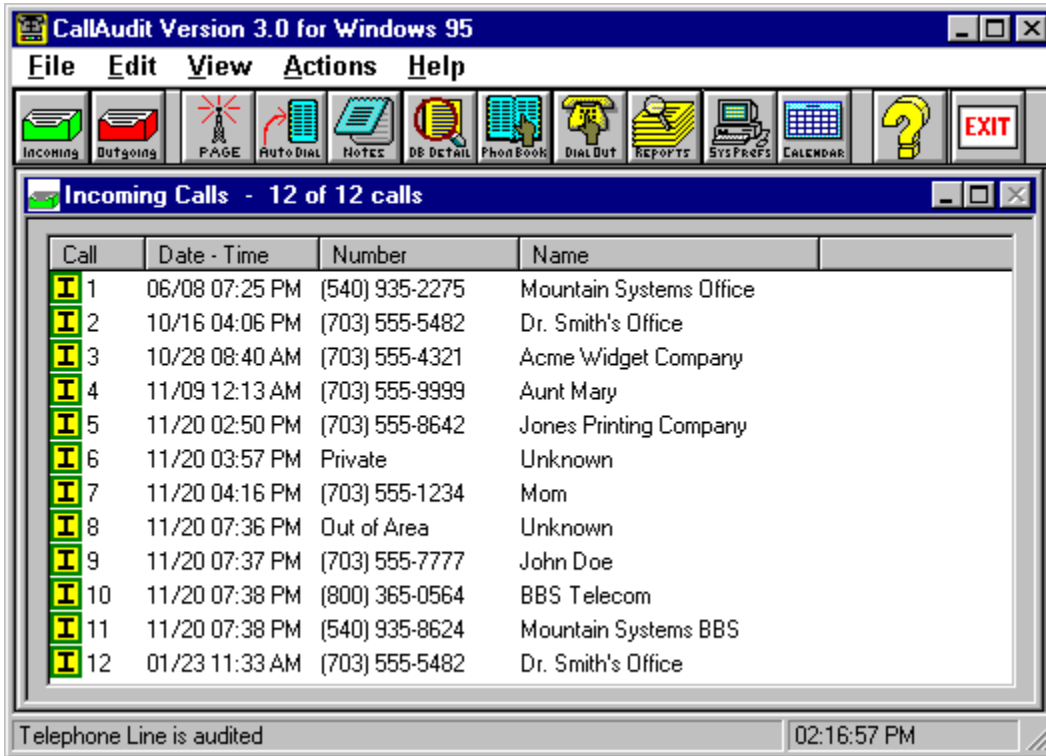
For more details on startup options, choose Search from the Help menu for CallAudit and search for "starting CallAudit."

#### **To quit CallAudit**

- From the File menu, choose Exit, or
- Press the Exit button on the main menu bar

# Program Operation Overview

CallAudit includes a main window area and a number of related child windows. An example of the main window is shown below.



The main window area includes a menu bar for selection of program options, a button bar for quick selection of key program functions, a central display area that will contain most of the other child windows, and a status bar at the bottom.

The central display area can include one or more child windows. Examples of child windows are the Incoming Calls Display, the Outgoing Calls Display, or the Phone Book. See the Help Contents for a complete listing of child windows.

Only one child window is active at a time. The top most child window is always the active window.

The menu bar includes one or more pull-down menus based on the active child window. The File and Help pull-down menus are common to all child windows. The number of pull-down menus present, and the contents of each, changes with the active child window.

Each of the basic window displays may be selected by either choosing an appropriate menu option or pressing one of the button bar buttons. For example, the Outgoing Calls display can be obtained by simply pressing the red Outgoing button on the button bar. The function of each of the button bar items is summarized below:



Brings Incoming Calls display to front.



Start Outgoing Calls display. Bring to front if already started.





View Call Notes for the selected call record.



See database record details for a single telephone number.



Start Phone Book display. Bring to front if already started.



Start Dial Out display. Bring to front if already started.



Start Generate Reports display. Bring to front if already started.



Edit System Preferences. Bring to front if already started.



Generate Calendar display. Call date is shown if incoming or outgoing call is selected, otherwise today's date is shown.



Obtain Help on CallAudit for the current display.



Exit CallAudit.

Program help is available at any time. A Help pull-down menu is always available with a number of help options. The question mark button on the button bar can be used to provide help about the current active child window. The F1 function key can be used to provide help on the current active window. Many child windows also provide a specific Help push-button, which can provide further help information.

The size and location of the main window display, and most of the child windows, can be changed by the user. When you exit CallAudit, it keeps a record of the last size and location of each window. The next time the CallAudit program starts it will return to the size and locations saved. Additional options exist for the automatic main window size adjustment and are covered in the [Display Defaults](#) portion of the [System Preferences](#) section.

The normal child window displayed in the main window area is the Incoming Calls window. This display provides a summary of all incoming calls including date/time, calling number, and name of the caller. As each incoming call occurs, a new summary line is added to this display. See the [Incoming Calls Display](#) section for more details on this display.

The time, date, and number information are provided automatically by the CallAudit software based on the [Caller ID](#) information from the telephone company. The name information is provided based on information you insert into a phone book database included with the product. The option exists to have a Caller ID name supplied by the telephone company appear here if you have Caller ID name service.

The status bar portion (bottom area) of the main window display includes a status message area on the left and a time/date area on the right. The status message area provides a one line summary of the

current state of the CallAudit system. Examples of messages displayed in this area include:

### **Telephone Line is Idle**

Default message after CallAudit starts. This indicates that CallAudit initialized without errors and is awaiting events on the incoming telephone lines to audit.

### **Telephone line is NOT audited**

Error message after CallAudit starts. This indicates that CallAudit initialized with errors and is not able to audit incoming calls on the telephone line.

### **Telephone is Ringing**

Message displayed when an incoming call begins. This message will be updated to reflect the number and name of the caller when the Caller ID data arrives between the first and second rings.

### **“Dial Out messages”**

A series of messages that shows the status events when placing outgoing calls. An example is “Placing outgoing call to XXX-XXXX”.

### **“Menu Selection messages”**

When a menu item is selected with the mouse, a one line summary of the action of that item is displayed. For example if the “By Day” item from the View menu is selected with the mouse, the status bar will show “View calls for the current day”.

### **“Database Event messages”**

CallAudit stores all of the incoming and outgoing call information in the CallAudit database. When database updates are being made, a one line summary will be displayed to indicate the area being updated. For example when placing an outgoing call the status line will initially change to “Updating call history database” to indicate that the software is making a permanent record of this outgoing call. A similar set of messages are displayed during the incoming call process to record the call.

## **The Incoming Call Process**

When an incoming call occurs, the following processes and steps are performed:

- A new summary line is added to the Incoming Calls display
- Incoming call audible alert is spoken
- Caller ID codes arrive between first and second rings
- Caller ID info is updated in Incoming Calls display
- Caller phone number or name is spoken
- CallAudit database is updated to reflect the new call

You can alter many aspects of this process using the System Preferences display screens. The above represents the normal setting for an incoming call. The following options also exist.

- The database details screen for this caller can be displayed
- The Notepad data for this caller can be displayed
- CallAudit can come to the foreground in Windows
- Audible alerts and spoken phrases can be turned on/off
- The program can run in icon mode and display a pop-up call summary
- Caller ID name service can be enabled
- The Incoming Calls can be sorted and displayed using different criteria

The System Preferences section covers the details of these options as well as the other features of the software.

## **How Calls Are Audited and Stored**

CallAudit uses your MODEM or other supported serial device to audit incoming calls and place outgoing calls. All CallAudit information is stored in a relational database included with the product. The

database is divided into tables that store related pieces of information.

A phone number table stores information about each of the telephone numbers known to the system. A call history table stores information on all calls, both incoming and outgoing, made since the program was installed. A current calls table stores information about your most recent calls (which are displayed in the Incoming and Outgoing Calls displays). A MODEM database contains information about the technical characteristics of each of the support hardware devices for CallAudit. A speed dial table stores information about the telephone numbers you use with the speed dial option on the Dial Out display.

An important distinction in CallAudit is the difference between the call history table and the current calls table.

The call history includes an entry for each incoming or outgoing call made since the CallAudit program was installed. The number of entries in this table can be very large and is only limited by the hard disk space on your system. Entries in this table can be deleted, if desired, using the delete record option described in the Generate Reports section.

The current calls table only includes records for the Incoming Calls and Outgoing Calls lists. The data for these displays is managed directly inside Windows memory area to provide fast performance for small size lists. The size of each of these displays is limited to a maximum of 500 calls each. This limitation is included to avoid slow program operation caused by a large number of current calls. You can further reduce the maximum number of entries using the System Preferences displays. When the list size is reached, the oldest call record is deleted to make room for the new record.

A number of program options exist using the View pull-down menu to sort the actual current calls displayed. You can display only the calls that occurred today, or the last week (actually the last seven days), or this month, or this year, or all calls. The text area on the call window provides a summary of the total current calls and the number displayed using the select view option. You can sort the calls in ascending or descending order of call time, by number, or by name.

After you have reviewed the incoming or outgoing details on older calls, you should delete them from these displays. If you don't delete them, and the maximum size limit is reached, CallAudit will automatically delete the oldest call from the list. It is important to note that even when calls are deleted from this display, the call information is still stored in the call history table. You obtain information about your call history records by using the Generate Reports option. The Reports area can also be used to make permanent deletion to the call history records.

When an incoming call occurs, CallAudit obtains the telephone number information from the Caller ID information supplied by your telephone company. The Caller ID information is provided by the telephone company as a series of special codes between the first and second rings. Your MODEM or serial devices passes this data to the CallAudit software.

CallAudit then looks that number up in your phone book to see what name, if any you have entered for this number. If the number exists, and you have supplied a name, then this name information is displayed in the Incoming Calls summary window. If the number exists, and you have not yet entered a name, then "Unknown" is displayed as the caller name. If no phone record exists for this telephone number, then a new record is automatically added to your database. As each new caller telephones your system, their phone number is automatically added to your database.

CallAudit also has the option to use Caller ID name service. Caller ID name service is also provided by the telephone company and provides the caller's name as well as the caller's number. When this option is selected, the Caller ID name supplied by the telephone will be displayed in the Incoming Calls display.

For each new incoming call, a record is added to your current calls table and a record to your call history table. These entries can be used later to generate call reports or to determine when a specific number called your line.

The same process is used for outgoing calls. Each call you make with CallAudit is entered in the Outgoing Calls display. A corresponding entry is made in the current calls table and call history table in

the database.

## **Other Program Displays**

CallAudit includes child windows for the following related displays:

- **Incoming Calls** which tracks incoming calls
- **Incoming Call Details** which provides more information on a single incoming call
- **Outgoing Calls** which tracks outgoing calls made through CallAudit
- **Outgoing Call Details** which provides more information on a single outgoing call
- **Phone Book** which provides a sorted list of all names and telephone numbers
- **Telephone Number Details** which provides all information for each number
- **Dial Out** which is used to place outgoing calls
- **Call Reports** which is used to generate reports on past calls and numbers
- **System Preferences** which is used to set different program options
- **Import Phone Numbers** which is used to import telephone numbers
- **Message Box** which is used for status messages
- **Calendar** which shows the current month in a calendar format

Each of these displays is described in sections to follow.

## **Getting Program Help**

CallAudit includes a complete Window help facility. You can press the F1 function key at any time to receive help on the current function or window. The question mark button on the main window display will always provide a help summary on the current active child window. Many of the child windows also include a separate Help button that can provide further information on the particular display function.

## **CallAudit Software Versions**

CallAudit is bundled in a variety of forms and versions for different types of Caller ID capable hardware. The current versions of CallAudit include:

### **CallAudit 2.1**

CallAudit 2.1 is the standard software package that supports a wide variety of single line Caller ID capable MODEMs and serial devices.

### **CallAudit MultiLine 2.1**

CallAudit MultiLine 2.1 is the multiple line software package that supports a wide variety of multiple line Caller ID hardware. CallAudit MultiLine 2.1 includes all the features of the standard product plus the ability to audit up to 65 separate telephone lines.

### **CallAudit Version 3.0 for Windows 95**

CallAudit Version 3.0 for Windows 95 is the newest offering from Mountain Systems. CallAudit 3.0 is a full 32 bit application designed for Windows 95. Version 3.0 offers that features from 2.1 plus many more new features including paging, TAPI support, and electronic mail.

### **CallAudit MultiLine 3.0 for Windows 95**

CallAudit MultiLine 3.0 for Windows 95 is the multiple line software package that supports a wide variety of multiple line Caller ID hardware. CallAudit MultiLine 3.0 includes all the features of the standard CallAudit 3.0 product plus the ability to audit up to 129 separate telephone lines, as well as other multiple line features.

### **CallAudit Routing Server 2.1**

CallAudit Routing Server is a software add-on package to CallAudit MultiLine 2.1 product. The CallAudit Routing Server software extends the capabilities of the MultiLine software across network environments. One PC acts as a call server, with the multiple line Caller ID hardware attached, and other client PCs on the network all receive the Caller ID data.

### **CallAudit Client 2.1**

CallAudit Client is a software add-on package to CallAudit MultiLine 2.1 product. The CallAudit Routing Server software extends the capabilities of the MultiLine software across network environments. One PC acts as a call server, with the multiple line Caller ID hardware attached, and other client PCs on the network all receive the Caller ID data. The CallAudit Client software runs on each client PC and provides all the capabilities of CallAudit MultiLine 2.1 using a network interface with the CallAudit Routing Server.

### **CallAudit Lite**

CallAudit Lite is a Caller ID software package that is bundled directly with specific single line MODEM and serial Caller ID capable devices. CallAudit Lite includes a subset of the features of the full CallAudit product.

## **CallAudit Demo**

CallAudit Demo is a demonstration version of CallAudit. It includes full functionality for demonstration purposes, but has restrictions on the number of calls, numbers, and records that can be processed.

## **CallerPROFILE Links**

CallerPROFILE Links is software version that is developed for Rochelle Communications. CallerPROFILE Links versions includes the standard product, multiple line product, and client and server versions.

## Private and Out of Area Calls

Each telephone company has an area in which they support Caller ID. The extent of this area varies with each local telephone company. In some cases this may be multiple states, and in other cases only your local area. Private and Out of Area calls are special calls supported by telephone companies.

If you receive a call from someone from out of the calling area supported by your telephone company, the Caller ID software will indicate Out of Area. Further identification of the caller is not possible. The CallAudit PhoneBook will show this number as O, which is the actual telephone number supplied by the telephone company for Out of Area calls. The other CallAudit displays will show the number as Out of Area and the name as Unknown.

The telephone company may also provide an option to have the Caller ID information blocked. This is usually a special service that can apply to all calls made by a Private caller, or on selected calls.

If you receive a call from someone who has their Caller ID information blocked, then you will receive only an indication that the caller is Private. Further identification of the caller is not possible. The CallAudit PhoneBook will show this number as P, which is the actual telephone number supplied by the telephone company for Private calls. The other CallAudit displays will show the number as Private and the name as Unknown.

Both of the PhoneBook entries for these numbers are permanent records and cannot be deleted by the user.

## CallAudit Version 3.0 for Windows 95 New Features

**CallAudit** Version 3.0 for Windows 95 is a 32 bit enhancement of the current CallAudit 2.1 software product. **CallAudit** 3.0 includes all the features of the current product with the following additions:

- 32 bit application designed for Windows 95
- Integrated paging support
- Microsoft Access 7.0 database format
- Icon based call log displays with sort headers
- Tip of the Day option
- Integrated E-Mail support
- TAPI Support
- Option for multiple PhoneBooks
- Associated telephone number support
- User configurable call log display options
- Windows 95 look and feel, including right mouse support
- Improved database performance using Microsoft Data Access Objects
- Expanded DDE support
- New database utilities

### Paging Support

**CallAudit** can issue pages to your personal pager for both incoming and outgoing calls. You can tailor the pager message to include the name and number of the caller as well as other call information. Messages can include up to 1024 characters. Pages can be generated for all calls or for calls from selected telephone numbers. **CallAudit** paging support can work with all paging systems including both numeric and alpha-numeric pagers. **CallAudit** can work with multiple pagers at the same time. Pages for incoming calls from specific numbers can go to separate pagers.

### E-Mail Capabilities

**CallAudit** can interface with your E-Mail system in many ways. **CallAudit** can send E-Mail to selected E-Mail addresses for every incoming call or from incoming calls from selected telephone numbers. CallAudit can automatically check the E-Mail inbox for new messages. If new messages are detected, CallAudit can prompt the user display and/or send a page to your pager indicating new E-Mail has arrived. **CallAudit** can also interface directly with your E-Mail system to support composing and sending user directed E-Mail.

### TAPI Support

**CallAudit** can now work with TAPI compliant hardware. This includes inbound Caller ID, outbound detection, call duration, call blocking, dial out, and other TAPI features. CallAudit will automatically detect the features supported by the selected TAPI device and configure the software accordingly.



## Multiple PhoneBooks

**CallAudit** now includes support for up to 16 separate PhoneBooks. You can view the telephone numbers by individual PhoneBook, or for all PhoneBooks. The name and contents of each PhoneBook is set by the user.

The font for the PhoneBook display can also be set and saved. Use the Edit menu to select the desired font. When the program exits, the selected font will be saved and restored at the next execution.

## Associated Telephone Numbers

Each telephone number has a separate database record. The associated number option allows you to have a single database record for a primary telephone number, and then associate any number of secondary numbers with the primary number data. Incoming calls will always show the number that called, but the database record displayed will be based on the associated primary record. Updates to the primary or associated records will be reflected in all associated records.

## Call Log Display Options

The incoming and outgoing call logs are now icon based. The individual columns included, and the width of each column, can be set by the user. Any column width changes are saved and restored at the next execution. You can sort the call log display by simply clicking on the column header.

The font for call logs can also be set and saved. Use the Edit menu to select the desired font. When the program exits, the selected font will be saved and restored at the next execution.

## Right Mouse Support

CallAudit 3.0 includes a variety of right mouse options along the line of Windows 95. In the call log display, one can use the right mouse to access the database details record, the call details, the PhoneBook for the highlighted call record, place an outgoing call, and other options. Similar capabilities are provided for the PhoneBook, Report, and other displays.

## Tip of the Day

CallAudit 3.0 includes a Tip of the Day option to provide hints on how to better use the program. You can have this start with each program execution, or call up the option at any time.

## New Database Utilities

New database utilities have been added to help manage the CallAudit database files. Database compact and repair options are available from the **Actions** menu. Use these functions to compact the size of the current database or repair the database if errors exists.

Use the **File Database Open** and **Save Database As** commands to backup the current CallAudit database or to open an existing database.

## **CallAudit Windows 3.X and Windows NT Differences**

CallAudit Version 3.0 includes support for Windows 95, Windows NT, and Windows 3.X. The feature set for Windows 3.X and NT is slightly different from Windows 95.

### **Windows 95**

CallAudit 3.0 for Windows 95 includes the full feature set with no restrictions.

### **Windows NT**

CallAudit 3.0 for Windows 95 includes the full feature set with the exception of TAPI support. Windows NT 3.51 does not currently support 32-bit TAPI.

Microsoft has stated that Windows NT 4.0 will support TAPI. The current Microsoft Beta version of NT 4.0 does support TAPI and the final products is also expected to support TAPI.

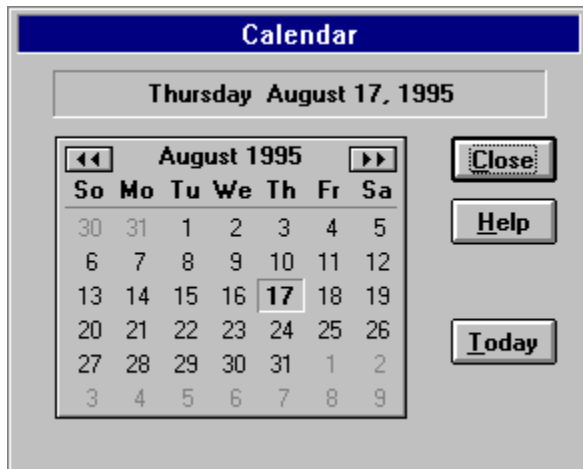
### **Windows 3.X**

CallAudit 3.0 for Windows 3.X includes a reduced feature set. The feature changes for the Windows 3.X user include the following:

- 16-bit application for improved performance in Windows 3.X
- Access 2.0 database ODBC format using dynaset access for faster performance
- Call log header widths automatically adjust to font size
- Call logs do not include icons
- Call log sorts are done via View menu
- E-Mail support requires a MAPI compliant mail system.
- Right mouse support not available

## Calendar

The Calendar option provides a standard monthly calendar for quick reference to dates. The calendar can be displayed by using the Calendar option from the Options item on the menu bar or by pressing the Calendar button on the button bar. An example of the calendar display window is shown below.



Use the left and right arrow keys to change the month. Press the Today button to have today's date displayed.

To see the calendar for a particular incoming or outgoing call date do the following:

- Select the Incoming Calls or Outgoing Calls display
- Select the desired call record with the mouse
- Press the calendar button on the button bar

The month for the selected call will be displayed with the call day shown.

## **Helpful Hints**

[Creating a new telephone number record](#)

[Editing an existing telephone number record](#)

[Delete multiple telephone numbers](#)

[Using a MODEM not in the supported list](#)

[Rejecting incoming calls](#)

[Testing the Whozz Calling? Single Line Device](#)

[Starting CallAudit Minimized](#)

## **Editing an Existing Telephone Number Record**

Each telephone number in the CallAudit database has a set of associated data fields which are user editable. The [Database Details](#) section provides more information on these fields and how they are edited.

To edit data for a telephone number record, use one of the following procedures:

### **From Incoming or Outgoing Calls list**

- 1) Identify call record from desired telephone number
- 2) Select the call record with the mouse
- 3) Press the DB Detail button on the button bar
- 4) Edit data as desired

### **From Phone Book**

- 1) Identify Phone Book record for desired telephone number
- 2) Double click the record with the mouse
- 3) Press the DB Detail button on the button bar
- 4) Edit data as desired

### **From Dial Out**

- 1) Input/select desired telephone number
- 2) Press the DB Detail button on the button bar
- 3) Edit data as desired

### **From Generate Reports**

- 1) Select desired report record using the mouse
- 2) Press the DB Detail button on the button bar
- 3) Edit data as desired

## Creating a New Telephone Number Record

New telephone number records can be created in the following ways:

### From Incoming Calls

A new telephone number record is automatically created whenever an incoming call occurs from a telephone number not currently in the CallAudit database. The name and number information are based on the Caller ID data supplied from your telephone company. The other data fields are initially filled with default values. No user action is required to add the record.

Use the steps outlined in [editing an existing telephone number record](#) to edit a newly created telephone number record.

### From Dial Out

A new telephone number record is automatically created whenever an outgoing call is placed to a telephone number not currently in the CallAudit database. All the data fields are initially filled with default values. No user action is required to add the record. See the [Dial Out](#) section for more details on placing outgoing calls.

Use the steps outlined in [editing an existing telephone number record](#) to edit a newly created telephone number record.

### From Telephone Number Record Details

The [Telephone Number Record Details](#) screen displays the data for a single telephone number. This display is generated by selecting a single telephone record and pressing the DB Detail button on the button bar. Create a new record from [the Telephone Number Record Details](#) screen using the following steps:

- 1) Press the Clear button to clear the current record
- 2) Enter the new telephone number in the Number data field.
- 3) Press the Update button to create the new record
- 4) Edit the other data fields as desired
- 5) Press the Update button to save entered changes

Note : When entering the telephone number in step 2, be sure to enter the entire 10 digit number (which includes the 3 digit area code). Do this even for local numbers that do not require the area code.

The Caller ID information for incoming calls (from the telephone company) always includes the entire 10 digits, even for local numbers. If you only enter the 7 digit number, CallAudit will not find this number when searching the database.

## Using a MODEM Not in the Supported List

Appendix A contains the list of MODEMs and serial devices known to support Caller ID and work correctly with CallAudit. Other MODEMs not in this list may also work. Use the steps below to test a MODEM not included in Appendix A.

- 1) Review MODEM user manual to check for Caller ID compatibility
- 2) Determine setup string to enable Caller ID
- 3) Press the System Preferences button on button bar
- 4) Select Modems area
- 5) Select User Specified Type for MODEM type.
- 6) Enter setup string from step 2
- 7) Press the OK button
- 8) Have someone call you to see if Caller ID data appears
- 9) If all numbers show as “Unknown”, your MODEM may not support Caller ID

See the MODEM Defaults and System Preferences sections for more details on MODEM selection and setup.

## Delete Multiple Telephone Numbers

The Phone Book section describes the process of deleting a single telephone number from the CallAudit database. Because the Phone Book uses a virtual list technology, it is NOT possible to select more than one number for deletion at a time.

By using the features of the Generate Call Reports area, multiple numbers can be deleted at once. Use the following approach to delete multiple telephone numbers from the database.

- 1) Press the Reports button on the button bar
- 2) Press the Customize button
- 3) Select Phone Number Report as the report type
- 4) Use the By Telephone Number and By Name fields to identify the numbers to be deleted
- 5) Press the Execute button to generate a phone number report
- 6) Confirm that ALL numbers in the report are to be deleted
- 7) Select the Delete Records option from the Edit menu.

All the report records will then be deleted from the database. Note that the database search will be dependent on the search values for Number and Name. For example:

- ) Suppose you want to delete all numbers from area code 213. Select only the By Telephone Number check box and enter 213. The report will then generate a list of all telephone numbers from area code 213.
- ) Suppose you want to delete all numbers that begin with 999 in your local area code of 508. Select only the By Telephone Number check box and enter 508999. The report will then generate a list of all telephone numbers from your local area code that begin with 999 .
- ) Suppose you want to delete all numbers for people whose names begin with John. Select only the By Name check box and enter John. The report will then generate a list of all telephone numbers for all people whose name begins with John.

By using a combination of the By Telephone Number and By Name search values, you can identify a set of records for deletion. Note that once telephone numbers are deleted, they cannot be recalled. Examine the report results carefully before selecting the Delete Records option from the Edit menu.



## **Rejecting Incoming Calls**

CallAudit has the capability to reject incoming calls from selected telephone numbers. Rejected incoming calls will ring once and then be hung up just before the second ring. This option allows the user to better control what telephone numbers will be accepted for incoming calls.

CallAudit call reject incoming calls on a telephone number by telephone number basis. The program also has the option to reject incoming calls from all first time callers. See the Incoming Calls portion of the [Database Details](#) section for more information on rejecting incoming calls.

## **Testing the Whozz Calling? Single Line Device**

CallAudit includes a special test program to test the Whozz Calling? single line device. The program is called WHOZZTST.EXE and is located in the CallAudit directory.

You can use this program to validate the communications connection to the device, check the firmware version, and to test the Caller ID features. See the only screen option for more information.

## How to set up DDE

Dynamic Data Exchange (DDE) is a Windows process for two Windows programs to share data and information. CallAudit 2.1 has the capability to act as a DDE client and communicate with other DDE servers. When an incoming or outgoing call occurs, CallAudit can use DDE to notify the other program about the number and name of the calling/called party.

The most common use of this feature is bring up contact records in a Contact Manager such as ACT! based on an incoming call processed by CallAudit. See the [DDE Support](#) section for more overview information about CallAudit support for Dynamic Data Exchange.

The basic steps in setting up DDE with CallAudit are as follows:

- a. Select **Enable DDE** from the DDE section of the System Preferences.
- b. Press the **Configure DDE Options** button.
- c. Select your desired program from the DDE program selection list.
- d. Verify and/or correct as necessary the path to your program's directory.
- e. Press the second **Browse** button to select your program's database file.
- f. Move to the **Incoming Calls** tabbed section.
- g. Press the **Open Examples** button and select the DDE file for the selected program from the CallAudit directory.
- h. Edit the FILE\_OPEN line to include the correct path and file name for your programs database (this step is only required for some programs).
- i. Press the **OK** button in DDE Program Interfaces Options.
- j. Press the **OK** button in System Preferences.
- k. Exit CallAudit to save all changes.

See the [DDE Defaults](#) section of the [System Preferences](#) section for more information on configuring CallAudit to support DDE. See the [DDE Application Selection](#) section for information on the selection of the DDE application program to be used. See the [DDE Incoming Actions](#) section for information on actions to be performed for each incoming call. See the [DDE Outgoing Actions](#) section for information on actions to be performed for each outgoing call.

## **Starting CallAudit Minimized**

CallAudit can be set to start in a minimized (running as an icon) form. This can be useful when CallAudit is automatically started as part of Windows startup. To have CallAudit start minimized, do the following:

1. Start CallAudit
2. Minimize CallAudit
3. Close CallAudit while minimized.

Step (3) is done by selecting the CallAudit icon with the mouse, and then choosing the Close menu option.

The next time CallAudit starts it will initialize and then return to minimized form. The key point to remember is that CallAudit, and all of its associated windows, always return to the state they were in when the program or window last exited or closed. This is true for window size, window location, and window display form (normal, minimized, or maximized).

## Appendix A - Supported MODEMS

Included below is the current list of MODEMS and serial devices supported by CallAudit for the detection of Caller ID information. If your MODEM or device is not on this list, or does not support Caller ID, then Caller ID information for incoming calls cannot be processed by CallAudit. Devices that do not support Caller ID will always show Unknown as the telephone number for all incoming calls.

Any MODEM or serial devices used to audit an incoming line must be Caller ID capable. See the Caller ID Service section for more details on Caller ID.

- Allied Electronics OMNI COMM 400 System
- BBS Telecom IPS308 Phone System
- BBS Telecom IPS416 Phone System
- Best Data Products Smart One 1442VLX
- Best Data Products Smart One 2834FLX
- Best Data Products Smart One 2834VLX
- Boca FDV 14i
- Boca FDVV 14i
- Boca Office Commander
- Boca Office Commander DSVD
- Boca Sound Expression 14.4SRS
- Boca Sound Expression 28.8SI/D
- Boca Sound Expression 28.8SRS
- CallAudit Client Operation Mode
- Cardinal MVP 144IV Internal Voice/Fax Modem
- Cardinal MVP 144XV External Voice/Fax Modem
- Cardinal Technologies MVP288IV Internal
- Cardinal Technologies MVP288XV External
- Complete Communicator Gold
- Creative Labs Phone Blaster
- Dallas Fax 2496C MODEM
- Dallas Fax 2496VC Voice MODEM
- Diamond Multimedia Systems TeleCommander 3500XL
- E-Tech Bullet 100 E 28.8 V.34
- E-Tech P192MX Bullit MODEM External
- Gateway Telepath II Caller ID 14.4 MODEM
- Generic Style MODEM 1200
- Generic Style MODEM 14400
- Generic Style MODEM 28800
- Generic Style MODEM 300
- GPS Caller ID Plug
- Hayes Optima 144 Business
- Hayes Optima 288 Business
- IBM Corp. Multimedia 13H6715
- J-Mark Computer A1428VQH34V
- Logiccode Quicktel 2814XV External
- Logiccode Technology 1414HV
- Logiccode Technology 1414XV
- Logiccode Technology 14V14HV
- Logiccode Technology 14V14PC
- Logiccode Technology 14V14XV
- Logiccode Technology 2814HV
- Logiccode Technology 28V14HV
- Logiccode Technology 28V14XV

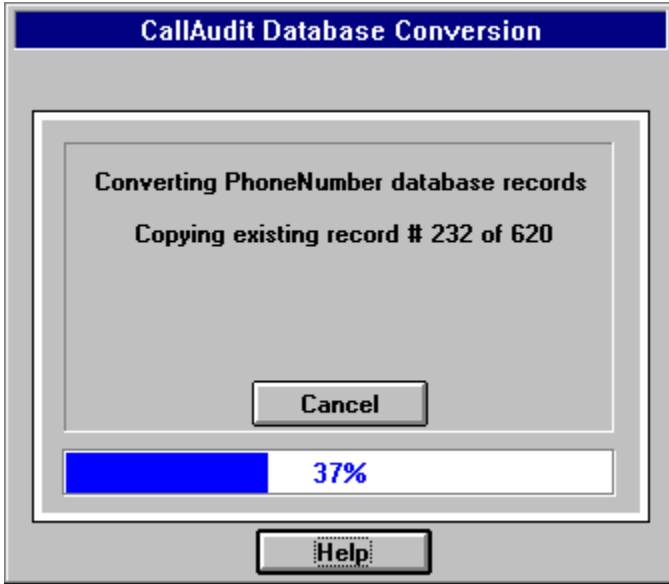
Motorola ISG HMTA200 Hybrid Modem  
Motorola Lifestyle V.34 External MODEM  
Motorola Power V.34 External MODEM  
Orion Telecommunications 14.4 Voice Modem  
Pika IdFi Caller ID Card  
Pika Inline 4 Voice Card  
Practical Peripherals PC288hc V.34 Internal  
Practical Peripherals PC288LCD V.FC External  
Practical Peripherals PC288MT II V.FC External  
Practical Peripherals PC288MT V.34 External  
Practical Peripherals PC288MT V.34 Internal  
Practical Peripherals PC288MT V.FC External  
Practical Peripherals PC288PKT V.FC External  
Practical Peripherals PM14400FX V.32bis Internal  
Practical Peripherals PM14400FXMT V.32bis External  
Prometheus Cyber Stereo PC144ivspa  
Prometheus CyberPhone 144VSP External Voice  
Prometheus CyberPhone 144VSP Internal Voice  
Prometheus CyberPhone 288VSP External Voice  
Prometheus CyberPhone 288VSP Internal Voice  
Prometheus CyberPort Pro PC288iv/ext  
Reveal Quad Office 14.4  
Rochelle ANI-232 Caller ID Plug  
Rochelle MLA/CIMS232 12-Line Caller ID System  
Rochelle Model 20040 MLA 6-Line Caller ID Unit  
Rochelle Model 2802 2-Line Caller ID Display  
Spectrum V.34 Office F/X  
Supra 144i Internal  
Supra 144LC External  
Supra Desktop Communicator  
SupraFAX MODEM 288 External  
SupraFAX MODEM 288i Internal  
SupraFAXModem 24K  
SupraFAXModem V.32bis  
TAPI Compliant Hardware Standard Interface  
TCI MLX-41 Caller ID Unit  
TCI MLX-82 Caller ID Unit  
U.S. Robotics Sportster VI 14.4 External Voice  
U.S. Robotics Sportster VI 14.4 Internal Voice  
U.S. Robotics Sportster VI 28.8 External Voice  
U.S. Robotics Sportster VI 28.8 Internal Voice  
Ven-Tel CS2001/Comm. Station  
Ven-Tel EC 288Fax/Passport 288e  
Ven-Tel EC144FaxII/Passport 144e  
Ven-Tel PCM 144FaxII/Passport 144i  
Ven-Tel PCM 288FaxII/Passport 288i  
Vive Call Editor II  
Vive RSA-A Caller ID Plug  
Vive RSA-I Caller ID Plug  
Western Data CryptoCom V32bis/V.34  
Western Data Worldcom 144  
YES Identifier MLM-2X 2 Line Unit  
YES Identifier MLM-4X 4 Line Unit  
YES Identifier MLM-8X 8 Line Unit  
Zeus Whozz Calling? Four Line Caller ID System

Zeus Whozz Calling? Single Line Device  
Zoom ComStar 610  
Zoom ComStar 620  
Zoom ComStar 623  
Zoom FaxModem V.34X  
Zoom VFDI 2400/9600  
Zoom VFDX External 2400/9600  
Zoom VFP (with Voice) 14400  
Zypcom Z32b-RX  
Zypcom Z32b-SE  
Zypcom Z32b-SED  
Zypcom Z32b-SEW  
Zypcom Z32b-SX  
Zypcom Z32t-RX  
Zypcom Z32t-SE  
Zypcom Z32t-SED  
Zypcom Z32t-SEW  
Zypcom Z32t-SX External  
Zypcom Z34-RX  
Zypcom Z34-SED  
Zypcom Z34-SEW  
Zypcom Z34-SX  
Zypcom Z34-SZ  
ZyXEL Elite 2864  
ZyXEL Elite 2864L  
ZyXEL Omni 288P  
ZyXEL Omni 288S  
ZyXEL U-1496 Plus External  
ZyXEL U-1496B  
ZyXEL U-1496B Plus  
ZyXEL U-1496E External  
ZyXEL U-1496E Plus External  
ZyXEL U-1496P Portable  
ZyXEL U-1496R  
ZyXEL U-1496RE

Many other MODEMs not in this list also support Caller ID. Most MODEMs that do support Caller ID follow the Rockwell standards on software interfaces. These MODEMs will likely work correctly with CallAudit. If the user's guide for your MODEM references Caller ID support, then enter the suggested setup string in the MODEM Defaults section of the System Preferences screens.

## Database Conversion

The Database Conversion program converts the existing data in your current CallAudit database to the new database format when a CallAudit software update is performed. Your existing database records will all be copied and modified as appropriate for the new database format. Your existing Notepad data files and audiotag sound files will also be converted.



With the release of CallAudit Version 3.0 for Windows 95, there are a number of different situations. If this is a first time installation for 3.0, any existing 2.1 database will be converted to 3.0. If 3.0 is being installed for a second time (as a result of a 3.0 software update), then any existing 3.0 database will be converted. The 3.0 database that is used depends on where CallAudit 3.0 is a 16-bit application for Windows 3.X or a 32-bit application for Windows 95.

The normal database name for CallAudit 2.1 is CALAUDIT.MDB. The normal database name for CallAudit 3.0 is CALAUD30.MDB (for the 16-bit version) or CALAUD32.MDB (for the 32-bit version).

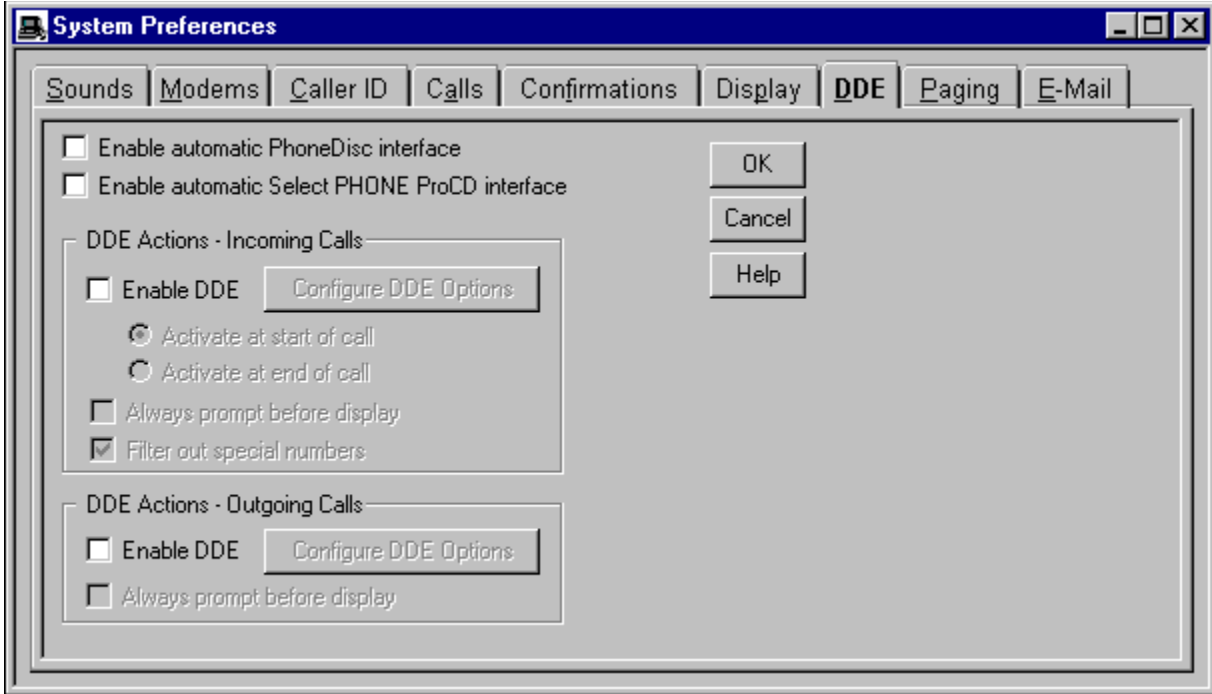
When a CallAudit software update is performed, your existing CallAudit database file is renamed. The new database has only a small number of default records to support an initial software installation. The records from your old database are then copied, one at a time, into the new database by the Database Conversion program.



## DDE Defaults

Dynamic Data Exchange (DDE) is a Windows process for two executing programs to share data and information. CallAudit 2.1 has the capability to act as a DDE client and communicate with other DDE servers. When an incoming or outgoing call occurs, CallAudit can use DDE to notify the other program about the number and name of the calling/called party.

The most common use of this feature is bring up contact records in a Contact Manager such as ACT! based on an incoming call processed by CallAudit. See the [DDE Support](#) section for more overview information about CallAudit support for Dynamic Data Exchange.



### Enable automatic PhoneDisc interface

Select this option to have CallAudit automatically look up the name and address for each incoming and outgoing call using the PhoneDisc CD-ROM. This lookup will also occur any time a phone number is added or updated in the PhoneBook.

**Note: You need PhoneDisc version 2.0.11 or later to use the DDE capabilities. You can check you version of PhoneDisc from the PhoneDisc Help menu. Earlier versions of PhoneDisc do not contain any DDE support. Contact DDA directly to obtain the latest version of PDWIN.EXE.**

The first time you use this option, you will be prompted to locate the PhoneDisc PDWIN.EXE file. CallAudit will automatically start the PhoneDisc program when CallAudit starts, and restart it (if necessary) at the time of each incoming call..

Only use this option if you have the PhoneDisc software installed on your PC and wish to have CallAudit perform this automatic lookup.

Choosing this option allows you to use PhoneDisc with CallAudit, and still use the remaining DDE options to connect with an additional program such as Symantec ACT!.

Selecting this option is all that is required to use CallAudit with PhoneDisc. The remaining options

below allow you to specify an additional DDE interface for CallAudit.

### **Enable automatic Select PHONE ProCD interface**

Select this option to have CallAudit automatically look up the name and address for each incoming and outgoing call using the Select PHONE ProCD CD-ROM. This lookup will also occur any time a phone number is added or updated in the PhoneBook.

**Note: This CD-ROM interface uses an ODBC database driver available from Select PHONE ProCD. You must have this ProCD ODBC software installed on your PC before this option can be used. Contact Select PHONE to obtain this software.**

Only use this option if you have the Select PHONE ProCD software installed on your PC and wish to have CallAudit perform this automatic lookup.

Choosing this option allows you to use PhoneDisc with CallAudit, and still use the remaining DDE options to connect with an additional program such as Symantec ACT!.

Selecting this option is all that is required to use CallAudit with PhoneDisc. The remaining options below allow you to specify an additional DDE interface for CallAudit.

### **DDE Actions - Incoming Calls**

Set the **Enable DDE** toggle button to enable DDE processing for incoming calls. When this option is selected a list of DDE commands will be issued for each incoming telephone call.

Press the **Configure DDE** Options button to configure how DDE processing is to be performed.

Press the **Always prompt before display** button to have CallAudit prompt before displaying new DDE results data from your DDE application. This setting can be useful when using CallAudit with contact managers and databases to avoid having the current record in which you may be working replaced with a new record for a new incoming or outgoing call.

Press the **Filter out special numbers** button to have CallAudit filter out special number from DDE processing. Special numbers include calls listed as Private, Out of Area, and No-CallerID. This is the default option as most DDE programs have no ability to deal with these special numbers. The exception to this might be a DDE interface to a paging system where the user wishes to know about all incoming calls, regardless of Caller ID.

Select the **Activate at start of call** option to have CallAudit activate the DDE link at the start of an incoming call. This will occur immediately after the first ring when the Caller ID data arrives.

Select the **Activate at end of call** option to have CallAudit activate the DDE link at the end of an incoming call. This will occur when the incoming call ends.

Note: The start and end call DDE options are only supported for certain types of multiple line Caller ID hardware. If your hardware does not support this capability, this option will not be available.

See the [DDE Application Selection](#) and [DDE Incoming Actions](#) sections for more information on configuring DDE options.

### **DDE Actions - Outgoing Calls**

Set the **Enable DDE** toggle button to enable DDE processing for outgoing calls. When this option is selected a list of DDE commands will be issued for each outgoing telephone call placing using CallAudit.

Press the **Configure DDE** Options button to configure how DDE processing is to be performed.

Press the **Always prompt before display** button to have CallAudit prompt before displaying new DDE

results data from your DDE application. This setting can be useful when using CallAudit with contact managers and databases to avoid having the current record in which you may be working replaced with a new record for a new incoming or outgoing call.

See the [DDE Application Selection](#) and [DDE Outgoing Actions](#) DdeOutgoingActionssections for more information on configuring DDE options.

The actions necessary to use the CallAudit DDE option include:

1. Select your DDE action options from the DDE Defaults display in the System Preferences area.
2. Select the Configure DDE option.
3. Select your DDE application program (ACT!, Access, or other Windows program).
4. Select the file to be used with your DDE application program. Some Windows DDE programs, Monologue for example, do not require a file.
5. Select/Edit the command file to be executed for your DDE application program. This list includes the specific DDE commands to be issued by CallAudit to the supporting DDE program. Specific example command templates are supplied for some common DDE programs. A separate command file can be used for incoming and outgoing calls. although both must use the same DDE server.

It is important to note that the DDE command file should be edited based on your selected application. Example command files are provided for some other popular Windows programs that support DDE.

## DDE Support

CallAudit provides a variety of Dynamic Data Exchange (DDE) support options. CallAudit can work with most other external software programs that can act as a DDE server. A common use of this function is with separate contact manager software programs such as Symantec ACT!, GoldMine, or databases such as Microsoft Access.

For each incoming and/or outgoing call, CallAudit can issue DDE commands to the external software. You can use these commands, for example, to bring up contact data from within your contact manager software or load records or forms from your database software.

CallAudit includes standard command templates for some common Windows software programs. These templates simplify the process of setting up DDE for CallAudit. Templates are currently provided for:

- Symantec ACT!
- Elan GoldMine
- Microsoft Access
- Microsoft Excel
- PageMaster by Omnitrend
- Maximizer for Windows
- Monologue for Windows
- WinBEEP
- Time & Chaos by iBiSTER
- PhoneDisc for Windows
- Select PHONE ProCD CD-ROM (ODBC interface only)

These template examples can be used to set up command templates for other similar Windows programs that can support DDE. See the [DDE with Other Programs](#) section for more information on how to connect CallAudit to a third party applications such as Visual Basic.

The basic steps in setting up DDE with CallAudit are as follows:

- a. Select **Enable DDE** from the DDE section of the System Preferences.
- b. Press the **Configure DDE Options** button.
- c. Select your desired program from the DDE program selection list.
- d. Verify and/or correct as necessary the path to your program's directory.
- e. Press the second **Browse** button to select your program's database file.
- f. Move to the **Incoming Calls** tabbed section.
- g. Press the **Open Examples** button and select the DDE file for the selected program from the CallAudit directory.
- h. Edit the FILE\_OPEN line to include the correct path and file name for your programs database (this step is only required for some programs).
- i. Press the **OK** button in DDE Program Interfaces Options.
- j. Press the **OK** button in System Preferences.
- k. Exit CallAudit to save all changes.

See the [DDE Defaults](#) section of the [System Preferences](#) section for more information on configuring CallAudit to support DDE. See the [DDE Application Selection](#) section for information on the selection of the DDE application program to be used. See the [DDE Incoming Actions](#) section for information on actions to be performed for each incoming call. See the [DDE Outgoing Actions](#) section for information

on actions to be performed for each outgoing call.

## DDE Application Selection

The Dynamic Data Exchange (DDE) Application Selection display is used to select the DDE application options to be used by CallAudit. These include the DDE server application to be executed, the application file to be used, and the application startup option. See the [DDE Support](#) section for more overview information about CallAudit support for Dynamic Data Exchange.

See the [DDE with Other Programs](#) section for more information on how to connect CallAudit to a third party applications such as Visual Basic.

Select your desired options and press the **OK** button to save your choices.

The screenshot shows the 'DDE Program Interface Options' dialog box. It has three tabs: 'Application Selection', 'Incoming Calls', and 'Outgoing Calls'. The 'Application Selection' tab is active. It contains several sections: 'DDE Program' with fields for Program (PhoneDisc for Windows), Service Name (PhoneDisc), Task Name (PDWIN), Executable (PDWIN), and Path (C:\PD); 'Program File' with fields for File (N/A) and Path (N/A); 'Start Up Options' with radio buttons for 'Start with CallAudit', 'Start with Incoming/Outgoing Call', and 'Start manually'; and 'Display Options' with checkboxes for 'Minimize at startup' and 'Restore at time of call'. There are 'Browse' and 'Test' buttons for the DDE Program and Program File sections, and 'OK', 'Cancel', and 'Help' buttons on the right.

## DDE Program Selection

Use the **Program** pulldown combo box to select the desired DDE application. You may select from the list of standard DDE application names, or enter your own selection. When you select an included program, default values are automatically inserted for the other fields in this section.

If you use a DDE application not in the combo box, then you must enter the **Service**, **Task**, and **Executable** field manually. The **Service** field is the name used by DDE services to connect to the external application. The **Task** field is the task name as reported by Windows. The **Executable** name is the EXE file name to be executed.

Use the **Browse** button in the DDE Program section to select the actual DDE application executable file to be used. After your selection both the Executable and Path entries will be completed.

Use the **Test** button to verify that your selected DDE application executable can be started as

entered.

### **Program File Selection**

Use the **Browse** button in the Program File section to select the actual DDE application program file to be used. This file will automatically be loaded each time the DDE application is started. After your selection both the File and Path entries will be completed. Note that some DDE server applications do not require the use of a specific file.

Use the **Test** button to verify that your selected DDE application file can be loaded as entered.

### **Start Up Options**

Select the **Start with CallAudit** option if you want the DDE server application to be automatically started when CallAudit first starts.

Select the **Start with Incoming/Outgoing Call** option if you want the DDE server application to be automatically started when an incoming or outgoing call begins. Some DDE applications have a long start up time and this may not meet user performance requirements.

Select the **Start manually** option if you want to start the DDE server application manually. When this option is selected, the CallAudit DDE options will only function when the application is running. If a call occurs and the DDE application is not running, then no DDE actions will take place.

### **Display Options**

Select the **Minimize at startup** option if you want your selected DDE application program to be minimized when started.

Select the **Restore at time of call** option if you want your selected DDE application program to be restored to full screen form at the time of an incoming/outgoing call.

### **Specific DDE Program Notes**

#### **Symantec ACT!**

**NOTE: WHEN USING ACT! WITH CALLAUDIT, ACT! WILL NORMALLY DO A LOOKUP FOR EACH INCOMING CALL. IF A CONTACT RECORD IS NOT FOUND, ACT! WILL PROMPT THE USER TO ACKNOWLEDGE THIS FACT. NO OTHER ACTIONS CAN OCCUR UNTIL THIS STEP COMPLETES.**

**ACT! Version 2.04 and later can be set up to not display this message. If you do not have ACT! Version 2.04 or later you can download an update from the Symantec BBS.**

**If you have version 2.04 or later, add the following command to your ACT! DDE template in CallAudit.**

**SetLevel 2**

**Add this line to the DDE template prior to the LOOKUP command. This command will turn off the DDE error messages when a contact record is not located. The default template**

**for ACT! already has this command added.**

CallAudit can now automatically add contacts to your ACT! database for callers that are not currently in your database. This is an optional feature that can be turned on or off by using the DDE template.

The ACT! DDE template includes three basic commands. The FILE\_OPEN command opens your ACT! database. The LOOKUP command tries to find a record that matches the callers telephone number. The ADD\_CONTACT\_IF\_MISSING command causes CallAudit to add a contact for this caller if no record is found.

A second version of this last command, ADD\_CONTACT\_IF\_MISSING\_PROMPT, is also included in the template, but is commented out. Use this command instead if you wish to be prompted before adding the new contact.

If you use PhoneDisc with CallAudit, the data obtained from PhoneDisc will be used to create the new ACT! contact.

When a new contact is added, the following ACT! fields will be initialized with data from CallAudit:

- Company
- Contact
- Phone
- Fax
- Address
- City
- State
- Zip Code
- User 1
- ID/Status - filled with ***CallAudit added record***

### **Monologue for Windows**

When using CallAudit with Monologue for Windows, set the Monologue mode for DDE server. If this option is not set manually within Monologue, then the CallAudit DDE options will not function.

You can have Monologue speak both the number and name by using the following commands.

- \$number-monologue
- \$name

See the [DDE Incoming Actions](#) area for information on how to enter these commands.

The CallAudit speak phone number and audio tag sound options should be turned off when using Monologue. When two different programs try to play sounds at the same time, only one will work correctly.

### **PhoneDisc for Windows**

When using CallAudit with PhoneDisc for Windows, actual name, and address information will be retrieved from PhoneDisc for each incoming and/or outgoing call. If the current phone number record has not been previously edited for this information (name, address, city, state, zip code), then any data retrieved from PhoneDisc will be used in the CallAudit phone number record database.

**Other programs not listed in the CallAudit options list.**



CallAudit can function with most other Windows programs that can act as a DDE server. The CallAudit DDEMGR.INI file contains a variety of variables that can be tailored for use with other Windows programs. These variables are located in the **DDE Support** section. Included below, as an example, are the default settings for Monologue for Windows.

```
ProgramName=Monologue for Windows
ProgramExeName=MONOLOGW
FilePath=N/A
FileTitle=N/A
ProgramPath=J:\MONOLOGW
ProgramExePathAndName=C:\MONOLOGW\MONOLOGW.EXE
StartWithCallAudit=1
StartWithCallAction=0
StartManually=0
ServiceName=MONOLOG
TopicName=TALK
TaskName=MONOLOGW
TransactionType=XTYP_POKE
```

The CallAudit DDE interface can accept values for most of the above variables. Adding support for a new program will involve manually setting correct DDE values for :

```
ServiceName
TopicName
TaskName
TransactionType
```

Consult your programs user' guide for the correct settings for these variables. See the [Advanced Section](#) for details on how to specify these values.



\$namechar	The name with comma chars removed
\$number	The telephone number for the incoming call. The format includes only the digits with no spaces or other formatting characters included.
\$number-a	The telephone number for the incoming call. The format includes the digits in the format XXX-XXX-XXXX, which is used by ACT! .
\$number-space	The telephone number for the incoming call. The format includes the digits in the format XXX XXX XXXX, which is used by some programs and users.
\$number-goldmine	The telephone number for the incoming call. The format includes the digits in the format (XXX)XXX-XXXX, which is used by GoldMine.
\$number-monologue	The telephone number with one space between each digit. This allows monologue to pronounce the number as separate digits.
\$number-7	The last seven digits of a 10 digit number
\$line	The line number for this call
\$userfield1	Value for the User 1 data field.
\$userfield2	Value for the User 2 data field.
\$dtmf	Value for the PostCallDtmf field
\$date	Text format for call date/time
\$duration	Text format for call duration in seconds
\$company	Text value for the company field

Note that if your database contains only 7 digit numbers (without the local area code), then you should use the \$number-7 variable.

Press the **Open Examples** button to load an example actions command file. These example files are loaded when CallAudit is installed and provide examples of common actions for specific DDE application programs.

If you use one of the supplied example command files, be sure to edit the parameters to use your database file. For example, the ACT! example makes reference to MYACTDB.DBF. This parameter should be replaced with the name of your ACT! database file.

Press the **Test** button to test the entered action commands. An incoming call will be simulated using the Mountain Systems support telephone number.



	spaces or other formatting characters included.
\$number-a	Provides the telephone number for the incoming call. The format includes the digits in the format XXX-XXX-XXXX, which is used by ACT! .
\$number-space	Provides the telephone number for the incoming call.  The format includes the digits in the format XXX XXX XXXX, which is used by some programs and users.
\$number-goldmine	Provides the telephone number for the incoming call. The format includes the digits in the format (XXX)XXX-XXXX, which is used by GoldMine.
\$number-monologue	The telephone number with one space between each digit. This allows monologue to pronounce the number as separate digits.
\$number-7	The last seven digits of a 10 digit number
\$line	The line number for this call
\$userfield1	Value for the User 1 data field.
\$userfield2	Value for the User 2 data field.
\$dtmf	Value for the PostCallDtmf field
\$date	Text format for call date/time
\$duration	Text format for call duration in seconds
\$company	Text value for the company field

Note that if your database contains only 7 digit numbers (without the local area code), then you should use the \$number-7 variable.

Press the **Open Examples** button to load an example actions command file. These example files are loaded when CallAudit is installed and provide an example of common actions for specific DDE application programs.

If you use one of the supplied example command files, be sure to edit the parameters to use your database file. For example, the ACT! example makes reference to MYACTDB.DBF. This parameter should be replaced with the name of your ACT! database.

Press the **Test** button to test the entered action commands. An incoming call will be simulated from the Mountain Systems support telephone number.

## **Advanced DDE Settings**

Use the Advanced Settings dialog to set specific DDE parameters. Only experienced users should attempt to change these settings, as incorrect values will cause the DDE option to function incorrectly.

Use the pull down combo box to select the DDE application transaction type. Only three types of transactions are valid.

Enter the DDE topic name in the topic name edit box. Consult your DDE program's documentation for information about the topic name to use.

## **DDE with Other Programs**

CallAudit can interface with other Windows programs using Dynamic Data Exchange (DDE). This interface can be used with a variety of commercial programs, such as Symantec ACT!, or with in-house developed systems such as Visual Basic.

The following is required to use CallAudit with another third party program:

1. Third party program is Windows based
2. Third party program can act as a DDE server
3. Third party program can display results based on DDE commands

The following steps and actions are necessary to establish the interface:

1. Enable DDE in CallAudit
2. Enter third party application specifics
3. Enter third party DDE commands

### **Enable DDE in CallAudit**

1. Select System Preferences from the button bar
2. Select the DDE tab
3. Check the Enable DDE button
4. Press the Configure DDE Options button

### **Enter third party application specifics**

1. Type a program description in the Program field
2. Enter the DDE service name in the Service Name field
3. Enter the windows task name in the Task Name field
4. Use the first Browse button to select the EXE file. This will fill in both the Executable field and the Path field.
5. Press the advanced button
6. Select the DDE transaction type (XTYP\_EXECUTE is the most common)
7. Enter the DDE Topic Name to be used (System is the most common)
8. Use the second Browse button to select an input file if your third party application requires a separate startup file or database. Enter blank data here if no file is required.

### **Enter third party DDE commands**

1. Select the Incoming Calls tab

## 2. Enter the DDE commands to be used in the DDE Commands area

Most applications will only require one or two commands. The most common action is a DDE command to bring up a display in the third party application based on an input telephone number. Some programs will also need a command to open a specific database file (the Microsoft Access template supplied with CallAudit is an example of this). CallAudit includes a number of data fields that can be used in these commands. See the Dde Incoming Actions section for more information about data fields.

Review the different examples supplied with CallAudit to see how these commands are done for standard commercial packages.



## MODEM and Comm Port Sharing

Windows communications software programs communicate with hardware devices such as MODEMs through Comm Ports. Examples of Windows communications software include CallAudit, the Windows Terminal program (which is located in your Windows accessories folder), and fax software such as ProComm Plus and Delrina WinFax Pro.

The normal Microsoft Windows standard is that only one communications software program can access a MODEM and communications port at the same time. If you start ProComm Plus using COM3 and then try and run Terminal using the same port, you will get an error message that says "The selected Comm Port is in use by another device". You must normally exit one program before the other program can be used.

CallAudit supports port sharing in different ways for the different CallAudit product versions. These options include:

<b>CallAudit 1.0/1.1</b>	- No port sharing supported
<b>CallAudit 2.0/2.1</b>	- 16-bit Windows communications port sharing
<b>CallAudit 3.0 / 16-bit</b>	- 16-bit Windows communications port sharing
<b>CallAudit 3.0 / 32-bit</b>	- 32-bit port sharing via TAPI

The 16-bit porting sharing option will allow CallAudit to share a MODEM port with another 16-bit Windows application. The details below provides further information on this option.

The 32-bit sharing option will allow CallAudit to share a MODEM port with another 32-bit Windows application, as long as both programs are using a TAPI interface. When both programs use TAPI, port sharing is automatic. When CallAudit detects another 32-bit program is using the same device via TAPI, the status line will change to

### **Telephone line audited and shared**

It is generally not possible to share a port between a 16-bit Windows application and a second 32-bit application using any current technology.

CallAudit 2.1 offers the option to share a MODEM and communications port with other Windows software and avoid this problem. CallAudit can be executing and auditing your calls and you can still use the same MODEM and port to receive or send faxes or data. This process will also work with voice mail software allowing CallAudit to audit the call and your existing voice mail software to answer the call and take a message.

CallAudit accomplishes this task using a MODEM sharing technology. When CallAudit starts, it opens the selected communications port. If the port is not in use, CallAudit operates normally. If the port is already open, it "borrows" the port to audit incoming calls and place outgoing calls. As most all of the CallAudit processing occurs before the telephone is answered, there is no conflict with other communications programs that either place calls or answer an incoming call.

When a hardware device and communications port are being shared with CallAudit, a number of different actions occur.

- Status line will show that the telephone line is shared.
- MODEM will be automatically re-attached to CallAudit software after each incoming call to maintain the Caller ID status.

The automatic MODEM re-attachment occurs approximately 5 seconds after the read/write action from the other software using the port. For example if the other software is receiving a fax, the MODEM initialization will not occur until the fax is completed and all faxing activity has stopped.

CallAudit attempts to display the telephone line status when port sharing is in effect. Because other communications software may have many options, the status line may not always reflect the true line status.

When port sharing is used, some unexpected events can occur with some Windows communications software. WinCim, for example, will sometimes generate a "fake" incoming call event during the CompuServe log on process. This is due to a RING EVENT generated by the MODEM during the connection process.

See the MODEM Defaults section of System Preferences to enable this option for CallAudit.

The following describes hints and procedures necessary to use this feature with other popular communications software.

**CallAudit starts first:** When sharing a comm port with another windows communications program, be sure CallAudit starts first, followed by the other software. In this way CallAudit can establish the port sharing changes before the other software starts. If CallAudit starts second, the port sharing feature may not work correctly.

CallAudit can automatically start the second program after CallAudit completes initialization. This is done by adding a line to the CallAudit INI file (which is located in the Windows directory). This entry includes the complete path name and EXE name for the program to be started.

For example to have CallAudit start FaxWorks, add the following line to the Defaults section of the CALAUDIT.INI file.

```
SecondProgramPathAndName=C:\FAXWORKS\FAXWORKS.EXE
```

When CallAudit completes initialization, the FAXWORKS.EXE program will automatically be started. An error message will be displayed if the second program fails to start or the path and/or program name are invalid.

**Note: When using the port sharing option of CallAudit, do not start CallAudit when another communication program is running and already processing data (eg. sending or reviewing a fax). Starting CallAudit at this time will almost always cause the other program abort processing.**

**Caller ID settings:** If the communications software has the option to enable Caller ID, then use this option. Some communications programs will disable Caller ID for each call, which will cause CallAudit not to receive the Caller ID data. Using this option will decrease the potential for conflicts between the two programs.

CallAudit requires that the MODEM echo responses back to the software. Some communication programs turn the echo option off. If the setup string for your software contains the string component E0 (which turns echo off), change it to E1 to turn echo on.

ProComm Plus for Windows, for example, offers the option to enable Caller ID for incoming calls. Many other programs offer the option to include your own setup string. If your program offers this option, include the Caller ID command in the setup string.

Most communications programs offer access to the MODEM setup string to be used. The System Preferences portion of CallAudit shows the setup string required to enable Caller ID for your MODEM.

Use the setup string portion after the AT and add this component to the setup string for the external communications software. The section below describes this process for some popular programs.

CallAudit can attempt to reinitialize the MODEM for Caller ID between each incoming call, but this approach should only be used as a last resort. This process starts about 10 seconds after the call completes. If another call occurs before this reinitialization is completed, the Caller ID data may not be available.

**Other CallAudit Settings:** When port sharing is being used to allow CallAudit to share a MODEM with another program, the **Use Comm Notify** option should be turned off. This option normally speeds program performance, but will cause problems when port sharing is used. See the Other Program Options section for details on how to configure this option.

**Fax software:** Set the software to answer after at least two rings. If possible, set to answer after three or four rings to introduce some time separation while CallAudit is finishing the incoming call and before the fax software starts to process the fax.

**Voice mail software:** Set the software to answer after at least two rings. If possible, set to answer after three or four rings to introduce some time separation while CallAudit is finishing the incoming call and before the voice mail software starts to play the greeting message and process the call.

### **ProComm Plus for Windows**

ProComm Plus for Windows contains two communications programs, PW2.EXE and FAXSTAT.EXE. PW2.EXE is the main program and handles fax and data functions. FAXSTAT.EXE is a smaller program that is only used for sending and receiving faxes.

FAXSTAT.EXE contains a port sharing capability integrated in the program. If you use the FAXSTAT.EXE program by itself (without PW2.EXE also running), be sure CallAudit starts before FAXSTAT.EXE. If FAXSTAT.EXE starts first it will get communications errors when it tries to receive a fax.

Add the Caller ID setup string to the string used by ProComm Plus to enable Caller ID. The Caller ID portion is added to the Initialization String in the Caller ID portion of the Data/MODEM Connection section. If for example CallAudit show the setup string as AT#CLS=8#CID=1, then add #CLS=8#CID=1 to the string shown in this field in ProComm Plus.

### **FaxTalk for Windows**

Add the Caller ID setup string to the string used by FaxTalk to enable Caller ID. Be sure the echo option is turned on, as the FaxTalk default is E0, which turns echo off. Use E1 to turn echo on.

### **Delrina WinFax**

WinFax has no known compatibility problems with CallAudit. Add the Caller ID setup string to the setup string used by Delrina WinFax.

### **Windows Terminal Program**

The Windows Terminal program has no known compatibility problems with CallAudit.

### **FaxWorks 3.0**

When using FaxWorks with CallAudit, disable the FaxWorks port sharing option as this will conflict with the port sharing option of CallAudit. CallAudit should start first, and then FaxWorks. If FaxWorks

starts first, the CallAudit port sharing approach will not work correctly.

Add the Caller ID setup string to the setup string used by FaxWorks. The Caller ID portion is added to the Initialization String in the Fax Setup section. If for example CallAudit shows the setup string as AT#CLS=8#CID=2, then add #CLS=8#CID=2 to the end of the string shown in this field in FaxWorks.

Note: This change in fax setup string is usually not required if your Zoom MODEM also supports Distinctive Ring. Zoom MODEM models with firmware version 2.0 or later offer this hardware option. CallAudit can generally work with FaxWorks versions 3.00f.041 and later without this change.

It is suggested that FaxWorks be configured to answer calls after the third ring or later. Answering after the first ring will eliminate the detection of any Caller ID data (which arrives between the first and second rings). Answering on the second ring can cause a CPU conflict as CallAudit is still finishing the incoming call details when FaxWorks will be trying to play the greeting message.

Some versions of FaxWorks ship with a different WAV driver called RHSIWAV.EXE. The use of this driver on some systems introduces a conflict with sound processing in CallAudit. It is suggested that the RHSIWAV.EXE not be used when CallAudit is used with FaxWorks. Most versions of FaxWorks supply a program called UNRHSI.EXE that will remove this driver.

### **QuickLink Message Center Version**

**Version 2.0.1** (As supplied with Robotics MODEMs)

When using **QuickLink Message Center**, CallAudit should start first, and then **QuickLink**. If **QuickLink** starts first, the CallAudit port sharing approach will not work correctly. In the **QuickLink** MODEM Setup area, be sure the **Caller ID Active** option is checked.

It is suggested that **QuickLink** be configured to answer calls after the third ring or later. Answering after the first ring will eliminate the detection of any Caller ID data (which arrives between the first and second rings). Answering on the second ring can cause a CPU conflict as CallAudit is still finishing the incoming call details when **QuickLink** will be trying to play the greeting message.

### **CompuServe WinCim**

Turn off the **Re-init after COM Port sharing** option in the Other Program Options dialog. Using this option with WinCim will cause NO CARRIER problems due to the method used by WinCim for opening a COM port and dialing out.

The Caller ID setup string does not need to be added for this program as WinCim as completely closes the port when the connection is completed.

### **Windows NT 3.5 Users**

Windows NT 3.5 allows users to execute standard 16 bit Windows programs. Windows NT 3.5 offers two memory options when 16 bit programs are executed: separate address space and shared address space.

When the separate address space option is used with CallAudit, port sharing should be disabled as it is not compatible with this option in NT.

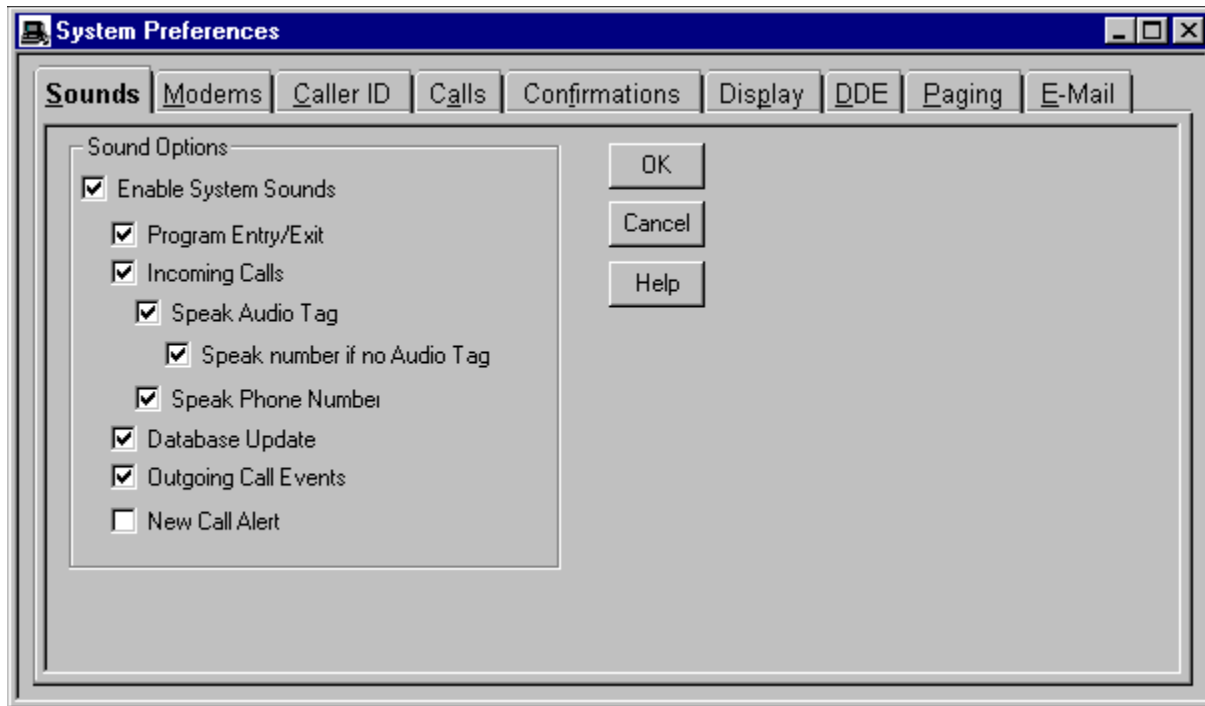
When the shared address space option is used (which means that all Windows 16 bit programs run in the same address space), port sharing can be used. Port sharing in this mode will only work with

other 16 bit Windows programs. Port sharing is not compatible with 32 bit Windows NT communications programs.

Port sharing in Windows NT requires a MODEM that can generate RING events in NT. Some MODEMs with 8250 UARTs will not generate this signal. For these MODEMs, port sharing will not operate correctly under Windows NT 3.5.

MODEM sharing may not work with all communications programs. Some program also implement their own form of device sharing and may not be compatible with sharing the port with CallAudit.

## Sound Defaults



CallAudit can use an attached computer sound board and connected speakers to provide audible messages and prompts on the status of the system. Any sound board capable of playing standard Windows .wav sound files will work.

The Sound portion of the System Preferences section is used to configure which systems sounds will be used. The available sound categories include:

- Program Entry/Exit
- Incoming calls
- Database update events
- Outgoing call events
- AudioTag file use
- Speak Phone Number
- New calls alert

These sound options can be turned on or off individually, or all can be turned off using the Enable System Sounds toggle button.

The **Program Entry/Exit** option announces when CallAudit starts and stops.

The **Incoming Calls** option announces each incoming call.

The **Speak Audio Tag** option uses any Audio Tag file you may have recorded to further announce an incoming call

The **Speak number if no Audio Tag** will speak the telephone number only if no Audio Tag file exists.

The **Speak Phone Number** option announces the caller telephone number for incoming calls.

The **Database Update** option events announces the results of each update action in the Database Details display.

The **Outgoing Call Events** announces the progress of outgoing calls made with CallAudit when using the Dial Out options.

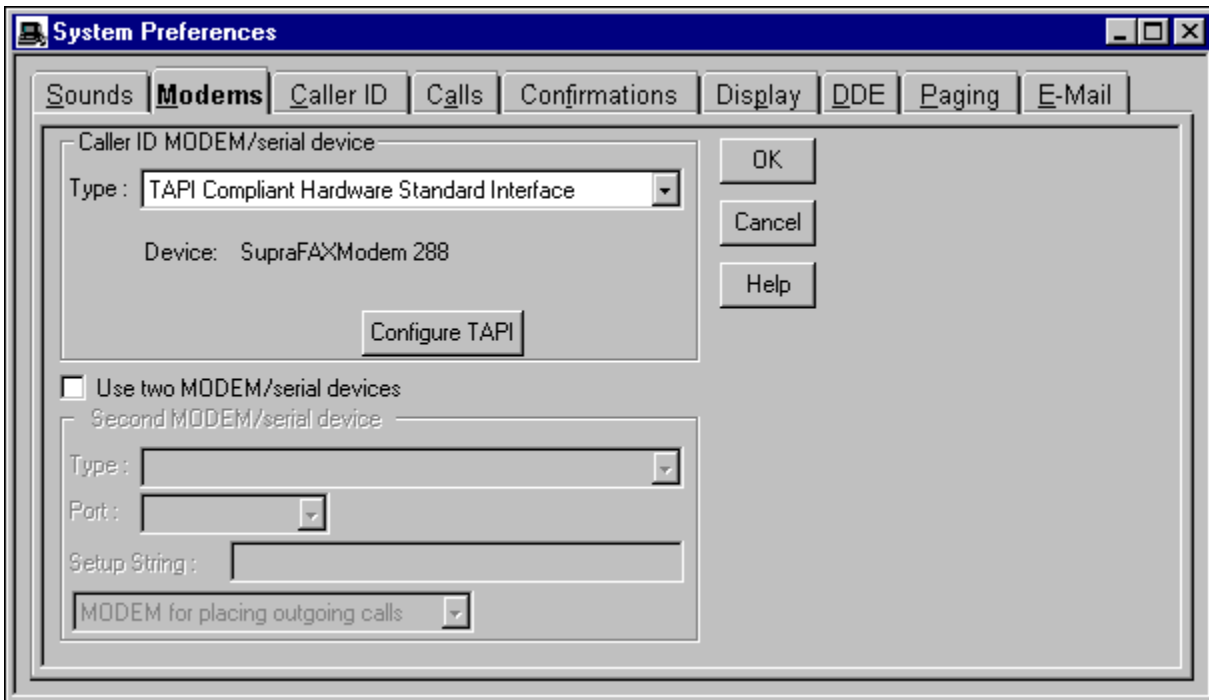
The **New Calls Alert** option will provide a re-occurring audio prompt if any new calls occur while the program is unattended. This provides an easy mechanism to determine if any incoming calls have occurred while you were out. The number of new calls will be announced approximately every 30 seconds. Selecting any option on any window will stop the alert.

# MODEM Defaults

CallAudit can support up to two MODEMS or Caller ID capable serial devices. The first Caller ID device is always used to audit incoming calls on your primary telephone line. This telephone line must be connected to the first identified serial device or MODEM. The second MODEM can be used for dial out options and/or to audit an additional telephone line.

The CallAudit MultiLine product supports auditing multiple telephone lines using a single primary hardware device. When the multiple line software is used, an additional field to indicate the number of lines is also shown. See the [Hardware Specifics](#) section for more information and hints about specific multiple line components;

Any MODEM or serial devices used to audit an incoming line must be Caller ID capable. See the [Caller ID Service](#) section for more details on Caller ID and [Appendix A](#) for a list of currently supported devices.



## Caller ID MODEM/Serial device

The Caller ID MODEM or serial device is always used to audit incoming calls on your primary telephone line. This device must be Caller ID capable and connected to the telephone line you wish to audit.

CallAudit can also use the first device to place outgoing calls, if the device supports this option (most all MODEMS do). Only one device is required by CallAudit. The first device must support Caller ID for CallAudit to provide identification information on incoming calls.

## Second MODEM/Serial device

The second MODEM or serial device provides an option to handle two separate telephone lines. A second MODEM can also be used to place outgoing calls on your primary telephone line if your Caller ID device does not support outgoing calls (some of the serial devices supported by CallAudit only monitor incoming calls and cannot place outgoing calls).



Your use of a second MODEM device is optional. Select the “Use two MODEM/serial devices” option to enable the second device. Select the “Log incoming calls on separate line” option if you wish to have the second MODEM audit incoming calls on a second separate telephone line. Select the “MODEM for placing outgoing calls” option if you wish to use the second device only to place outgoing calls.

It should be noted that if both MODEMs or serial devices are connected to the same telephone line, the “Log incoming calls” option on the second MODEM should not be selected. Selecting this option in this situation will result in duplicate calls in the [Incoming Calls](#) display.

### **MODEM Parameters**

For each MODEM or serial device you must specify the device type, the Windows communications port to be used, and the initialization string (if required by the device). The device type is a pull down list that displays the hardware devices currently supported by CallAudit. You must choose one device from this list. If no type is chosen for the first device, CallAudit CANNOT audit incoming calls.

When you installed a serial device in your computer you had to specify its communications port. After choosing the device type, you must select this same port for CallAudit. The port numbers supported by CallAudit are COM1 through COM9.

When you choose a serial device type, a default initialization string is also selected. This is the default string that generally provides acceptable performance for this device type and CallAudit. You may change this string if you desire. It should be noted however, that your changes can effect whether CallAudit will correctly detect the Caller ID information supplied by the telephone company. You should use caution when changing this initialization string.

If you change the string and want to return to the system default, re-select the device type.

### **Number Lines**

The CallAudit MultiLine product supports auditing multiple telephone lines using a single primary hardware device. Use this pulldown menu to select the total number of incoming lines connected to the select multiple line Caller ID hardware device.

### **First Ring Suppression**

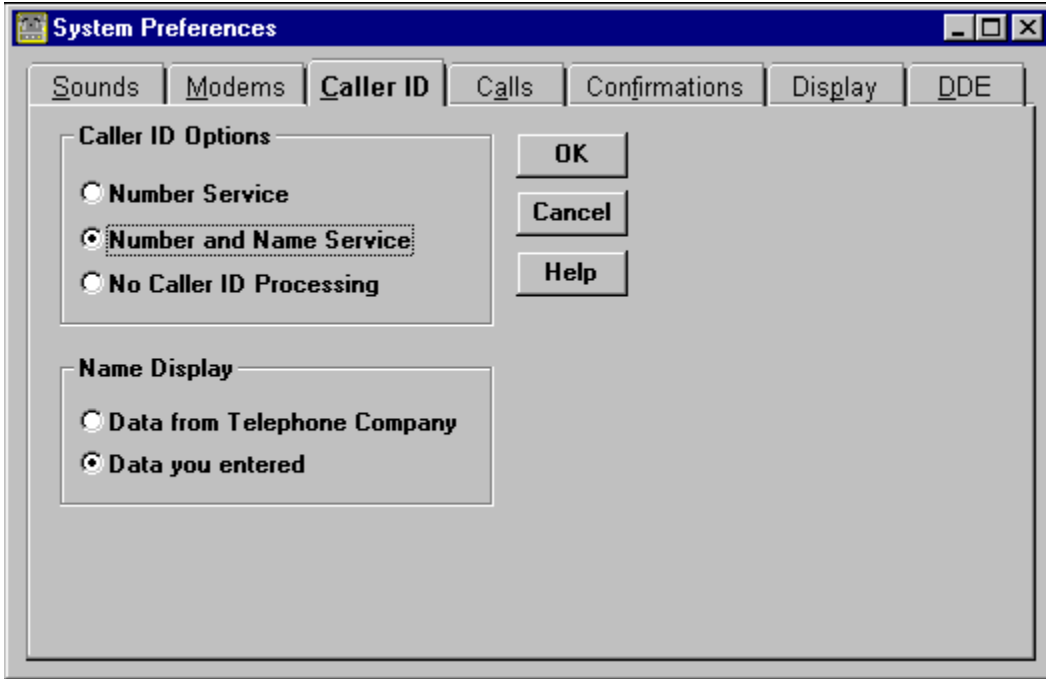
Some Caller ID hardware supports the option to suppress the first ring to other telephone devices. If the selected hardware supports this option, the **1st ring suppression** option will be available. Selecting this option will suppress the first ring to any telephone device connected to the Caller ID hardware output.

### **MODEM and Port Sharing**

CallAudit 2.1 supports MODEM sharing with other Windows communications software. Select the “Shared Mode” button if MODEM/Port sharing is desired. See the [MODEM and Comm Port Sharing](#) section for more information on MODEM and port sharing.

# Caller ID Defaults

CallAudit uses Caller ID information to provide detailed information on your incoming calls. Without Caller ID from your telephone company CallAudit cannot determine the telephone number of incoming calls.



## Caller ID Options

The **Number service** option receives only Caller ID number information for incoming calls. The caller name will be supplied based on the information in the CallAudit database for this telephone number.

The **Number and name service** option will use both number and name information as supplied by the telephone company in the Caller ID string. The caller name will be displayed in the Incoming Calls windows as received through Caller ID. This option requires that your local telephone company support Caller ID name service, and that you have purchased it from them.

The **No Caller ID processing** option will disable Caller ID processing. All incoming calls will continue to be listed in the Incoming calls window, but the number and name will show as Unknown.

## Name Display

Select the **Data from Telephone Company** option to have the name information as supplied by the telephone company used for name display in call logs. This option is only available if you select the **Number and name service** option from above.

Select the **Data you entered** option to have the name information you entered in the database name field used for name display in call logs. See the Telephone Number Database Details section for more information about entering your own name data.

## Special note for Zoom 14.4 MODEM users

Recent Zoom 14.4 models now support distinctive ring. When distinctive ring is enabled, Caller ID WILL NOT FUNCTION! You can determine if your Zoom modem supports

distinctive ring by looking at the Revision number in the SOFMODEM.ID file in the FaxWorks directory. A Revision number of V2.00 or later supports distinctive ring.

To disable distinctive ring, do the following:

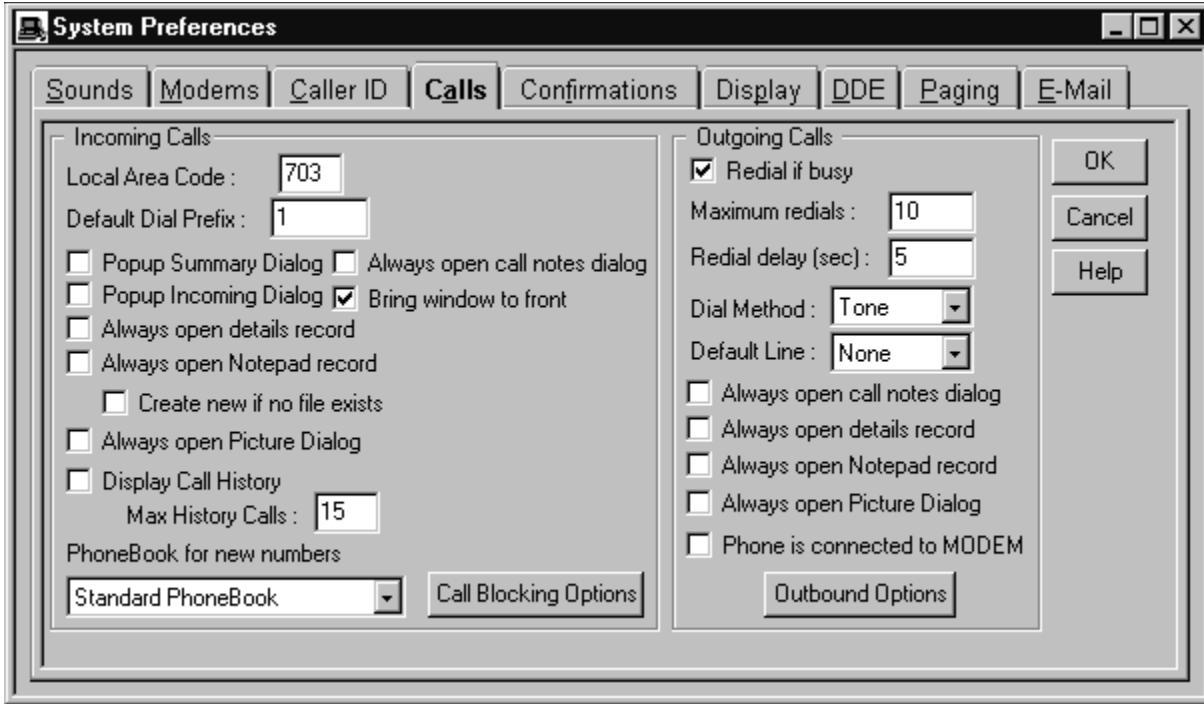
- Start the windows terminal program

- Open the Zoom modem

- Enter the following string `AT$$R0`

This will disable distinctive ring and allow the Caller ID data to be passed to software

# Calls Defaults



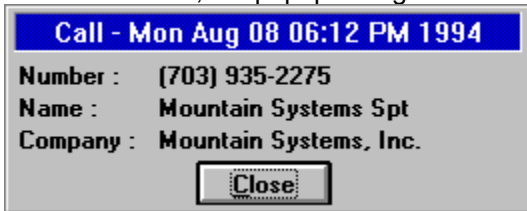
## Incoming Calls

The incoming calls section includes an entry for your local area code, a toggle button for a popup dialog for each incoming call, a toggle button to bring the main window to the top of your display on incoming calls, a toggle to always open the database details record for an incoming call, a toggle button for displaying recent call history in the Incoming Call Detail display, and a maximum number of history records to be displayed.

The **Local Area Code** field is the local area code for your telephone number in your area. This is used as the default value (for telephone number searches) in the Generate Reports area, and to shorten the incoming calls audio prompt for calls from within your local area code.

The **Default Dial Prefix** is the default dial prefix to be used for outgoing calls. This dial prefix will be applied to new telephone numbers created from non-local area code incoming calls.

Select the **Popup Summary Dialog** check box if you want a popup dialog to occur for each incoming call. An example of the popup dialog is shown below. The popup dialog window will include the time/date of the call, and the number, name, and company associated with the calling party. If this check box is selected, the popup dialog will occur even if CallAudit is running in icon mode.



Select the **Popup Incoming Dialog** check box if you want a popup dialog to occur for each incoming call with more detailed information. Use this dialog, for example, if you wish to see the call history for the caller for each incoming call. See the Incoming Call Details section for more details about this dialog display. If this check box is selected, the popup incoming dialog will occur even if CallAudit is running in

icon mode.

Select the **Bring window to Front** check box if you want CallAudit windows to always come to the front of your display for incoming calls. This setting will apply to pop-up dialogs as well as to the CallAudit main window. If you do not select this option and a CallAudit window is covered by other windows in your system, when an incoming call occurs the CallAudit window will NOT come to the front of your display.

Select the **Always Open Details Record** check box if you want to see the database details record for a telephone number for all incoming calls. If you only want to see the database details record for selected telephone numbers, use the check box described in the [Telephone Number Record Details](#) section instead.

Select the **Always Open Notepad Record** check box if you want to see the existing Notepad data for a telephone number for all incoming calls. If you only want to see the Notepad data for selected telephone numbers, use the check box described in the [Telephone Number Record Details](#) section instead.

Note: The Notepad data will pop-up if a Notepad data file has already been created for this number. See the [Telephone Number Options](#) section for creating a Notepad data file for a specific telephone number. See the next option if you want CallAudit to create a new Notepad data file if one does not already exist.

Select the **Create new if no file exist** check box if you want to have CallAudit automatically create a Notepad file if one does not already exist.

Select the **Display Call History** check box if you always want to see the call history when you select the [Incoming Call Details](#) display. The Max History Calls field determines the maximum number of call history items to be displayed. If you do not select this option, you can always recall the call history using the Show History button on the [Incoming Call Details](#) display.

Use the **PhoneBook for new numbers** option menu to select the PhoneBook for the numbers of first time callers. Every first time caller has their telephone number added to the CallAudit database. This option determines which PhoneBook will be used. See the [Telephone Number Record Details](#) section for more information for changing the PhoneBook of an individual phone number.

Select the **Call Blocking Options** button to select how calls from selected telephone numbers are to be handled.

## Outgoing Calls

The outgoing calls section includes a toggle button for re-dial if busy, maximum number of re-dials, and time delay in seconds between re-dials. Use these options to control how outgoing calls are to be handled if the called number is busy.

Use the **Dial Method** to select either Pulse or Tone dialing. Only choose tone dialing if your MODEM supports this option (most current MODEM hardware supports tone dialing).

Use the **Default Line** to select the default telephone line to be used for outgoing calls. You can always change this option when placing outgoing calls by selecting the desired line. This option is only used when you have two MODEM devices selected for use by CallAudit. See the [MODEM Defaults](#) section for more information on using two MODEMs.

The **Always open details record** and **Always open Notepad record** choices provide the option to view the database and Notepad data when placing outgoing calls. Selecting either of these options will effect outgoing calls to all telephone numbers. If you only want to see the details information for selected telephone numbers, use the options shown on the [Telephone Number Record Details](#) display.

Selecting the **Always open details record** will cause the [Telephone Number Record Details](#) display to be displayed for each outgoing call. This option allows you to review the complete database details for the telephone number being called.

Selecting the **Always open Notepad record** will cause the Notepad data display to be displayed for each outgoing call. This option allows you to review the Notepad data for the telephone number being called.

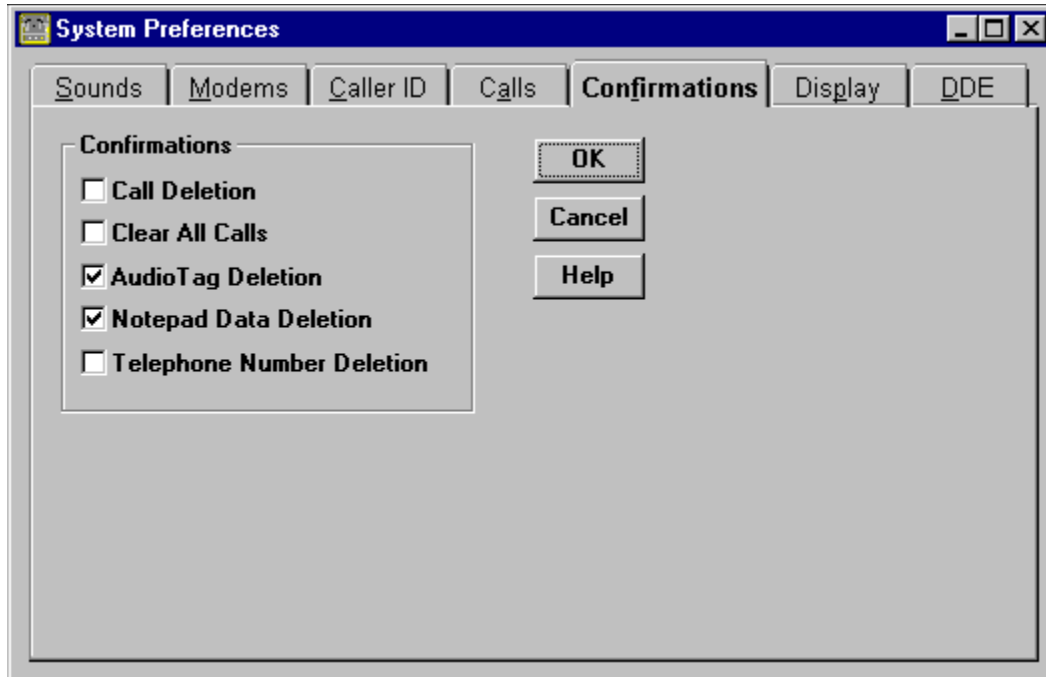
Select the **Phone is connected to MODEM** check box if your telephone is connected to the output of your MODEM. If you connect your telephone this way, CallAudit will prompt you to lift the telephone receiver when placing outgoing calls using the DialOut options. If your telephone is connected directly to a wall outlet, this box should not be checked.

When the phone is directly connected to the MODEM, the CallAudit keypad cannot be used, during the call process, to enter additional touch tone codes. This is sometimes desired when dealing with voice mail response systems, and with some long distance calls. If you connect your telephone to the MODEM, these extra tones will have to be entered directly from the telephone.

If the phone is not connected to the MODEM, and is connected instead to a wall jack directly, the CallAudit keypad or numeric keypad can be used to enter additional touch tone digits.

Select the **Outbound Options** button to enter outbound dial prefixes that are to be ignored for outbound dialing.

## Confirmation Defaults



The confirmation section controls how database deletions are handled. Each toggle will instruct CallAudit to prompt you before an action is performed.

The **Call Deletion** toggle will prompt you for confirmation each time you delete a call from either the incoming or outgoing calls list.

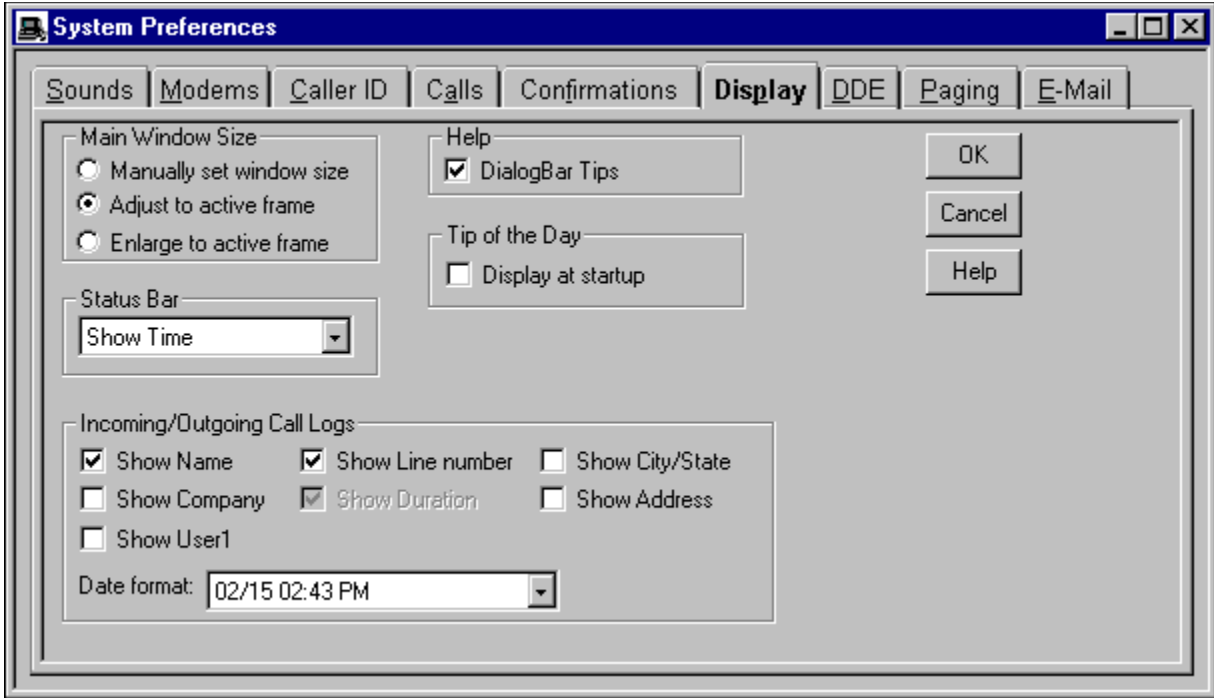
The **Clear All Calls** toggle will prompt you any time you delete all calls from either the incoming or outgoing calls list.

The **AudioTag Deletion** toggle will prompt you when you delete the AudioTag File for a telephone number.

The **Notepad Data Deletion** toggle will instruct CallAudit to prompt you any time you delete the Notepad data file for a telephone number.

The **Telephone Number Deletion** toggle will instruct CallAudit to prompt you any time you delete a telephone number record from your PhoneBook.

# Display Defaults



The main window size section controls how the main window is re-sized to accommodate different sized child windows.

The **Manually set window size** option forces CallAudit to make no changes to the main window size. Any re-sizing must be done by you.

The **Adjust to active frame** option allows CallAudit to automatically adjust the size of the main window to fit the current active child window. This results in always being able to see the entire child window at the expense of having the main window display change size every time you change child windows.

The **Enlarge to active frame** option allows CallAudit to only enlarge the main window to include the size of a new child window. When a smaller child window is chosen, the larger size will remain in effect.

The **Tip of the Day** option determines if the Tip of the Day dialog is displayed each time CallAudit is started.

The **Incoming/Outgoing Call Logs** section determines which data fields is displayed in the incoming and outgoing calls logs. Fields that cannot be supported by your hardware (e.g. call duration is not provided or supported by all Caller ID hardware) will be disabled.



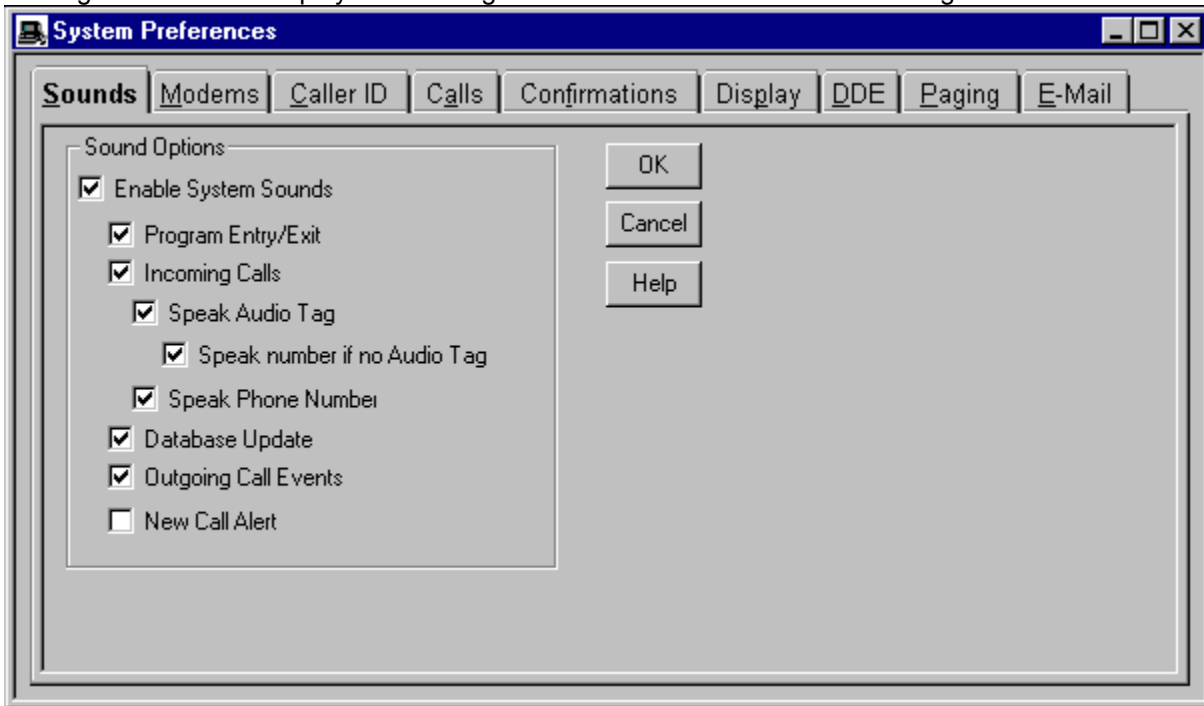
# Configuring System Preferences

CallAudit includes a number of system parameters that determine different aspects of program operation. These areas include:

- [System sounds](#)
- [MODEM settings](#)
- [Caller ID options](#)
- [Call processing](#)
- [Confirmation settings](#)
- [Display options](#)
- [DDE options](#)
- [Paging options](#)
- [E-Mail options](#)

CallAudit includes a separate display for each of these different system preference areas. These displays are tabbed to make it easy to move between different categories of preferences. Use the mouse and press the tab for the desired system preferences area.

In each case you can make changes in any or all of the displays. Pressing the OK button will save all changes made to all displays. Pressing the Cancel button will cancel all changes made.



## **Outbound Exclusion Prefixes**

When placing outbound calls, long dial prefixes are sometimes required to interface with long distance carriers or for other reasons. CallAudit MultiLine, when used with some multiple line Caller ID hardware, can detect and log all outbound calls made from any touch tone device.

These long prefixes will look like a long telephone number to CallAudit. The outbound exclusion prefixes are included to deal with this problem. Any outbound call beginning with one of the exclusion prefixes will be edited to remove this data before the telephone number is determined.

Thus if the digits 10288 7039352275 were dialed, and the digits 10288 entered as an exclusion prefix, then the number 7039352275 would be reported as the dialed number. This offers a more accurate method to track calls.

## **Hardware Specifics**

CallAudit MultiLine supports a variety of multiple line Caller ID hardware. Included below are some specifics and details necessary to support individual components.

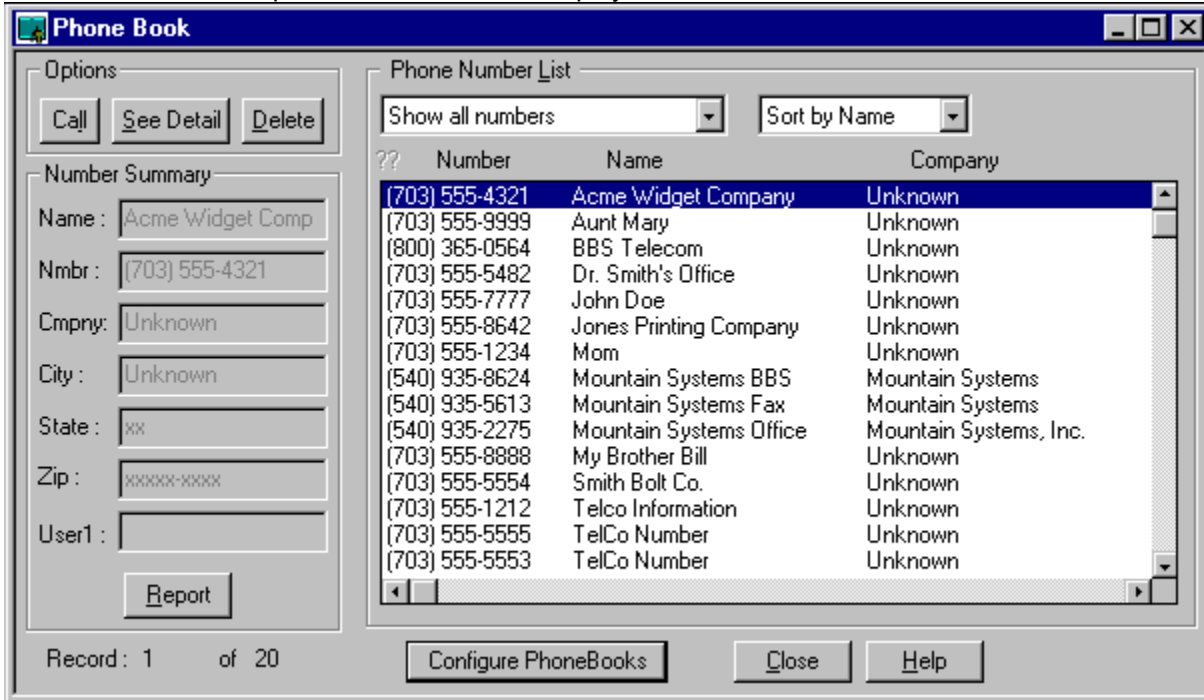
### **TCI MLX-82**

The TCI MLX-41 and MLX-82 units should be set for 9600 BAUD, 8 data bits, no parity, and 1 stop bit.

## Managing Your Phone Book

CallAudit stores all telephone number information in a relational database. The Phone Number table includes one record for each telephone number known to your system.

The PhoneBook display window can be started by pressing the Phone Book button on the main window button bar. An example of the Phone Book display window is shown below.



If the current active child window (for example the [Incoming Calls Display](#)) has a call item highlighted when the Phone Book button is pressed, then this record will be highlighted when the Phone Book display appears.

The scrolling list area on the right shows all telephone numbers in the current telephone number database. A count of total records is also shown.

Use the **Sort By** option to select the way your PhoneBook records are sorted. You can sort by Name, Number, Company, City, State, Zip code, or User 1. The default setting is to sort by name.

Use the **Show** option to select the subset of total telephone number records to be displayed.

Select **Show all numbers** option to display all telephone numbers. The default setting is to show numbers.

Select the desired PhoneBook to display number only from that phonebook.

Press the **Configure PhoneBooks** button to configure the PhoneBooks.

When the PhoneBook is opened, the last values used for Sort By and Show are restored.

The font for the PhoneBook display can also be set and saved. Use the Edit menu to select the desired font. When the program exits, the selected font will be saved and restored at the next execution.

CallAudit uses a virtual list technology to manage the size of the Phone Book list display. Only the numbers displayed on the screen are managed inside the Windows memory area. The size of this list

is only limited by the hard disk space on your computer and does not have the list limitations imposed on the Incoming and Outgoing window lists. As a result, the scrolling of this list and some processing options are slower to accommodate an arbitrarily large list.

You can move through the Phone Book record list using the mouse or the keyboard. Use the Page Up and Page Down keys to move up or down one page of records at a time. Use the up and down cursor keys to move up or down by single records.

You can also move to PhoneBook records by entering characters into the phone number list area. If the list is sorted by name, then entering the letter S would move to the first record with a name starting with the letter S. If the list is sorted by Company, then the company field is used for comparison when letters are entered for search. The type of sort option selected in each case determines the field to be used for search.

If a next search character is entered within 1 second of displaying the search result, the combination of letters is used to locate the record. For example if the letter S is entered, and then the letter A, then the first record starting with SA is located and highlighted.

The Options choices area include Call, See Details, and Delete. The Call button is used to place an outgoing call to a selected number. The See Details button is used to bring up the Telephone Number Details record for a single number. The Delete button is used to delete a single number from the database.

An outgoing call may be placed from this screen in two ways:

- Select a number with the mouse and press the Call button
- Select a number with the mouse and press the Dial Out button on the main window button bar

The detail record for a single telephone number can be viewed in two ways:

- Select a number with the mouse and press the See Details button
- Double click on a number with the mouse

A number can be deleted from the number database in a number of ways:

- Select the number with the mouse and press the delete key
- Select the number with the mouse and press the Delete button
- Select the number with the mouse and use the Edit pull-down menu cut option
- Use the delete option on the Number Detail display
- Delete the number as using the Delete Records option in Report Generation

The Search Criteria area is used to search the telephone number database for one or more numbers. The initial criteria is copied from the telephone number record for the selected number. The value for the user data field User 1 is also shown in this area.

Pressing the Search button will bring up the Reports Parameters display, which is part of the Generate Reports area. This portion of the software can then be used to search the number database in a more comprehensive manner. See the Generate Reports section for more information on this area.

## Configuring PhoneBooks

CallAudit 3.0 support up to 16 user defined PhoneBooks. Each PhoneBook has a title that is used for identification and a description area.

**Select** the PhoneBook to be changed from the **Available PhoneBooks** list using the mouse.

Enter the PhoneBook title in the **Name** field.

Enter the description in the **Description** field.

Press the **Update** button to save the changes.

CallAudit includes PhoneBook option in the PhoneBook area, the Import area, and the Calls portion of System Preferences.

## Incoming Call Details

Detailed information on each incoming call, beyond that included on the Incoming Calls display, is stored in the CallAudit database. The Incoming Call Details dialog window provides a more detailed summary of this information. You can bring up this call details dialog window for any single call by placing the cursor on this call entry in the Incoming Calls Display and double clicking the first mouse button.

**Incoming Call Details**

**Call Summary**

**Call Information**

Call # : 3 of 3 Line # : 1  
Date/Time : Tue Jun 20 01:05 PM 1995  
Call Duration :  
Caller Number : (703) 935-2275  
Name : Mountain Systems  
Company : Mountain Systems  
Address : 153 Mimosa Street  
FAX Number : (703) 935-5613

**Call Options**

Delete Call Notes Callback  
Phone Book DDE Link Show History ->

First Call Prev Call Next Call Last Call Close Help

**No History requested**  
Total calls to date : N/A  
No call history requested

The **Call Information** portion includes additional data about this call, and the data for the associated telephone number.

The **Post Call DTMF** field shows the keystrokes entered by callers after the telephone is answered. This option is only available with the CallAudit multiple line software when used with multiple line hardware that captures and reports touch tone digits entered by the caller after the telephone is answered. This field is grayed out for non-supported hardware or calls in which no post call DTMF data is entered.

The **Call Options** section provides options to delete this call record, go to the Phone Book database display for this telephone number, to Callback this telephone number, or to display the recent incoming and outgoing call history for this number. Incoming and outgoing calls are marked with “In” and “Out” respectively.

The **DDE Links** option button is used to display the user selected application data for the selected call record telephone number. Use this option as a quick way to view the DDE information for any call record.

Included at the lower left corner are four buttons to move through the current call records. These include first call, previous call, next call, and last call.

Included in the upper right area is the call history for this telephone number. It includes a count of the total calls to date from this number as well as a summary of the last few calls. The maximum number of calls displayed in the call history details section is a system option that can be changed in the System Preferences area.





## Outgoing Call Details

Detailed information on each outgoing call, beyond that included on the Outgoing Calls display, is stored in the CallAudit database. The Outgoing Call Details dialog window provides a more detailed summary of this information. You can bring up this call details dialog window for any single call by placing the cursor on this call entry in the Outgoing Calls Display and double clicking the first mouse button.

**Outgoing Call Details**

**Call Summary**

**Call Information**

Call # : 9 of 9 Line # : 1  
Date/Time : Tue Jun 20 01:07 PM 1995  
Call Duration : 00:00:04  
Caller Number : (703) 935-2275  
Name : Mountain Systems  
Company : Mountain Systems  
Address : 153 Mimosa Street  
FAX Number : (703) 935-5613

**No History requested**

Total calls to date : N/A

No call history requested

**Call Options**

Delete Call Notes Callback  
Phone Book DDE Link Show History ->

First Call Prev Call Next Call Last Call Close Help

The **Call Information** portion includes additional data about this call, and the data for the associated telephone number.

The **Post Call DTMF** field shows the keystrokes entered by callers after the telephone is answered. This field is only used for incoming telephone calls. This option is only available with the CallAudit multiple line software when used with multiple line hardware that captures and reports touch tone digits entered by the caller after the telephone is answered. This field is grayed out for non-supported hardware or calls in which no post call DTMF data is entered.

The **Call Options** section provides options to delete this call record, go to the Phone Book database display for this telephone number, to Callback this telephone number, or to display the recent incoming and outgoing call history for this number. Incoming and outgoing calls are marked with “In” and “Out” respectively.

The **DDE Links** option button is used to display the user selected application data for the selected call record telephone number. Use this option as a quick way to view the DDE information for any call record.

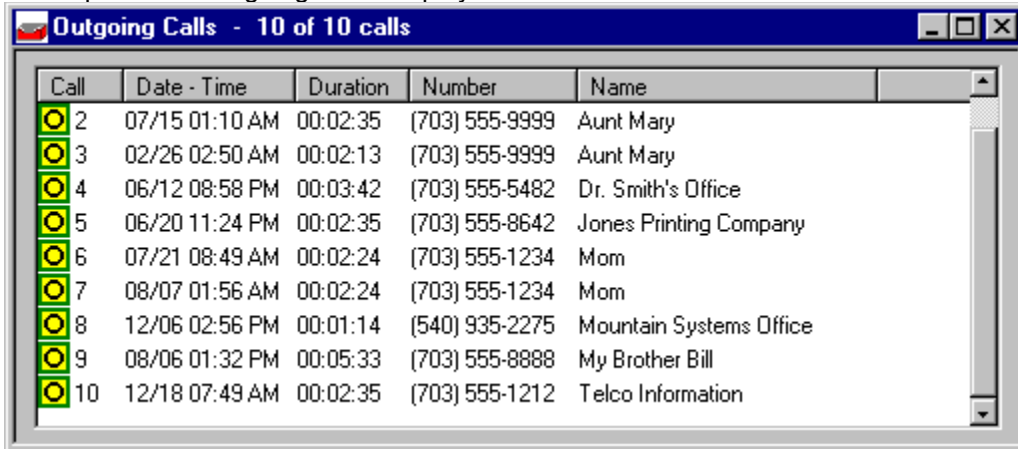
Included at the lower left corner are four buttons to move through the current call records. These include first call, previous call, next call, and last call.

Included in the upper right area is the call history for this telephone number. It includes a count of the total calls to date from this number as well as a summary of the last few calls. The maximum number of calls displayed in the call history details section is a system option that can be changed in the System Preferences area.



## Outgoing Calls Display

The Outgoing Calls Display provides one line of data in a scrolling list for each outgoing call. An example of the Outgoing Calls Display is shown below.



Call	Date - Time	Duration	Number	Name
2	07/15 01:10 AM	00:02:35	(703) 555-9999	Aunt Mary
3	02/26 02:50 AM	00:02:13	(703) 555-9999	Aunt Mary
4	06/12 08:58 PM	00:03:42	(703) 555-5482	Dr. Smith's Office
5	06/20 11:24 PM	00:02:35	(703) 555-8642	Jones Printing Company
6	07/21 08:49 AM	00:02:24	(703) 555-1234	Mom
7	08/07 01:56 AM	00:02:24	(703) 555-1234	Mom
8	12/06 02:56 PM	00:01:14	(540) 935-2275	Mountain Systems Office
9	08/06 01:32 PM	00:05:33	(703) 555-8888	My Brother Bill
10	12/18 07:49 AM	00:02:35	(703) 555-1212	Telco Information

The displayed data includes time and date of the call, the caller telephone number, and the caller name as it exists in your phone book.

CallAudit can also display call duration for certain types of hardware that support call duration processing. If your hardware supports call duration, the display will be expanded to show this data as an additional column.

You can move through the display by using the cursor, the Page Up and Page Down keys, or by moving the scrolling indicator (the small square box in the scrolling area on the right) directly. A call item can be selected with a single mouse click. A call item can be de-selected with a second single mouse click or by pressing the space bar.

If more than one telephone line is being used with CallAudit, an additional column can be shown to indicate the line number for outgoing calls. See the [MODEM Defaults](#) section in the [System Preferences](#) area for more details on using multiple lines with CallAudit.

The Outgoing Calls window title includes a count of the outgoing calls displayed. An example of this text might include:

### Outgoing Calls - 14 of 149 calls

This message indicates that 149 calls are in the outgoing calls list and that 14 of these are displayed based on the View setting. Changing the View setting will determine what subset of the total calls are to be displayed. A common setting is View calls By Week, which will only show the outgoing calls for the last seven days.

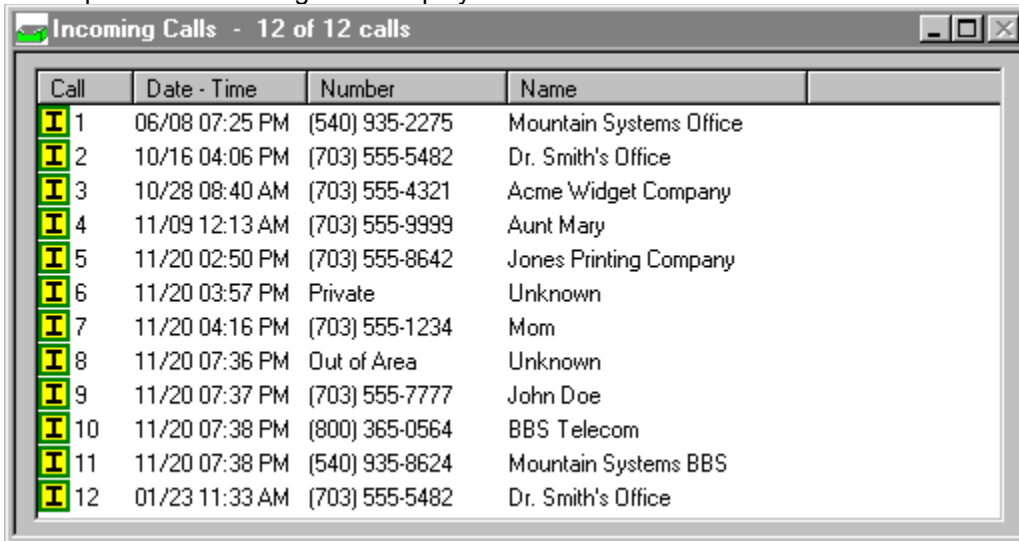
Only calls for the current session are stored in this outgoing list. A maximum of 1500 calls can be stored. You can further reduce this number using options in the [System Preferences](#) area.

Detailed information on each outgoing call, beyond that included on the *Outgoing Calls* display, is stored in the CallAudit database. The [Outgoing Call Details](#) dialog window provides a more detailed summary of this information. You can bring up this call details dialog window for any single call by placing the cursor on this call entry and double clicking the first mouse button.

You can review and/or update the information associated with each telephone number by selecting a single call record and then pressing the DB Details button on the button bar. This action will bring up the [Database Details](#) dialog display.

## Incoming Calls Display

The Incoming Calls Display provides one line of data in a scrolling list for each incoming call. An example of the Incoming Calls Display is shown below.



Call	Date - Time	Number	Name
1	06/08 07:25 PM	(540) 935-2275	Mountain Systems Office
2	10/16 04:06 PM	(703) 555-5482	Dr. Smith's Office
3	10/28 08:40 AM	(703) 555-4321	Acme Widget Company
4	11/09 12:13 AM	(703) 555-9999	Aunt Mary
5	11/20 02:50 PM	(703) 555-8642	Jones Printing Company
6	11/20 03:57 PM	Private	Unknown
7	11/20 04:16 PM	(703) 555-1234	Mom
8	11/20 07:36 PM	Out of Area	Unknown
9	11/20 07:37 PM	(703) 555-7777	John Doe
10	11/20 07:38 PM	(800) 365-0564	BBS Telecom
11	11/20 07:38 PM	(540) 935-8624	Mountain Systems BBS
12	01/23 11:33 AM	(703) 555-5482	Dr. Smith's Office

The displayed data includes an icon to show the call type (icon display is available only in CallAudit 3.0 32-bit version for Windows 95), the time and date of the call, the caller telephone number (if available), and the caller name as it exists in your phone book.

**Note:** CallAudit 3.0 can also display a variety of other variables. This can include company, user fields, and other data variables. See the System Preferences Display area to select the variables for display.

If Caller ID name service is in effect, the name as supplied by the telephone company can be used.

**Note:** In CallAudit 3.0 the Incoming call log display can also display a combination of incoming and outgoing calls. Use the View Menu or the right mouse pop-up menu to select a combined incoming/outgoing calls display.

To use the right mouse option (available only in 32-bit version for Windows 95), place the cursor in the call log area and press the right mouse button. Select the Incoming and Outgoing Calls option to toggle between the display options.

When the dual display option is used, the call log title will change to Incoming/Outgoing Calls.

See the Caller ID Options section of System Preferences for more information on how to display caller name data.

For CallAudit Client operation, the call time/date is determine in one of two ways:

For calls received while the client is connected to the server, the call time/date will be based on the client PC clock.

For calls downloaded from the server (which were received while the client was not connected), the time/date will be based on the server PC clock.

CallAudit can also display call duration for certain types of hardware that support call duration processing. If your hardware supports call duration, the display will be expanded to show this data as an additional column.

The caller telephone number and name can take a variety of values:

### Number

**10 digit number** - Telephone number received by CallAudit as supplied by the telephone company Caller ID service. CallAudit will always force all numbers to be 10 digits, which will include the local area code for local callers.

**Private** - Indicates that the caller has their Caller ID data blocked. Name will always show as Unknown as no name data is provided by the telephone company for these types of calls. See the Private and Out Of Area Calls section for more information about Private calls.

**Out of Area** - Indicates that the caller is calling from out of the area supported by the telephone company for Caller ID. Name will always show as Unknown as no name data is provided by the telephone company for these types of calls. The most common causes for this situation are callers from another state or callers from cellular telephones. In April of 1995 the FCC has mandated that all telephone companies will support Caller ID across state boundaries. See the Private and Out Of Area Calls section for more information about Out of Area calls.

**No-CallerID** - Indicates that either no Caller ID data was received, or that the data received was invalid or corrupted. Calls that only ring once and complete before the telephone company passes the Caller ID data will show as No-CallerID. The use of a MODEM or serial device that do not support Caller ID will show all numbers as No-CallerID as no Caller ID data is ever received.

**CallerIDError** - Indicates that Caller ID data that was received contained errors. One cause of this problem is using a Caller ID device with Number/Name service from the telephone company, when the device only supports Number service.

**No-DataRcv** - Indicates that either no Caller ID data was received, or that the data received was invalid or corrupted. Calls that only ring once and complete before the telephone company passes the Caller ID data will show as No-CallerID. Calls with this identifier will usually show an invalid date as no valid date/time information was received.

**Unknown** - Indicates that no Caller ID or other telephone number data was received.

## Name

**“CallerID Name”** - If you have Caller ID name service, the name as supplied by the telephone company will be displayed. Most telephone companies send names in all capital letters and with few spaces. The Number and Name Service option must be selected in the Caller ID System Preferences section for the telephone company supplied name to be displayed.

Note: Recent FCC changes have resulted in the implementation of Nationwide Caller ID in most areas of the US. Each telephone company is handling the Caller ID name somewhat differently. Some telephone companies will send the true name of the caller as if it were a local caller. Other telephone companies will send the City and State (separated by a comma) of the caller in the name field. Contact your local telephone company to see how this is handled for your area.

**“PhoneBook Name”** - If you do not have caller ID name service, or the Number Only Service option is selected in the Caller ID System Preferences section, then the name from the PhoneBook for this number will be displayed.

**Unknown** - Indicates that name information for this number is currently unavailable. This is the case for first time callers when Caller ID name service is not in effect, and for all Private and Out of Area calls.

**REJECTED CALL** - Indicates a call was received from a telephone number marked in the PhoneBook as a rejected call number. CallAudit will hang up the phone after about 2 rings for any numbers marked as rejected numbers.

You can move through the display by using the cursor, the Page Up and Page Down keys, or by moving the scrolling indicator (the small square box in the scrolling area on the right) directly. A call item can be selected with a single mouse click. A call item can be de-selected with a second single mouse click or by pressing the space bar.

The Incoming Calls window title includes a count of the incoming calls displayed. An example of this text might include:

**Incoming Calls - 39 of 166 calls**

This message indicates that 166 calls are in the incoming calls list and that 39 of these are displayed based on the View setting. Changing the View setting will determine what subset of the total calls are to be displayed. A common setting is View calls By Day, which will only show the incoming calls for the current day.

Only calls for the current session are stored in this incoming list. A maximum of 1500 calls can be stored. You can further reduce this number using options in the System Preferences area.

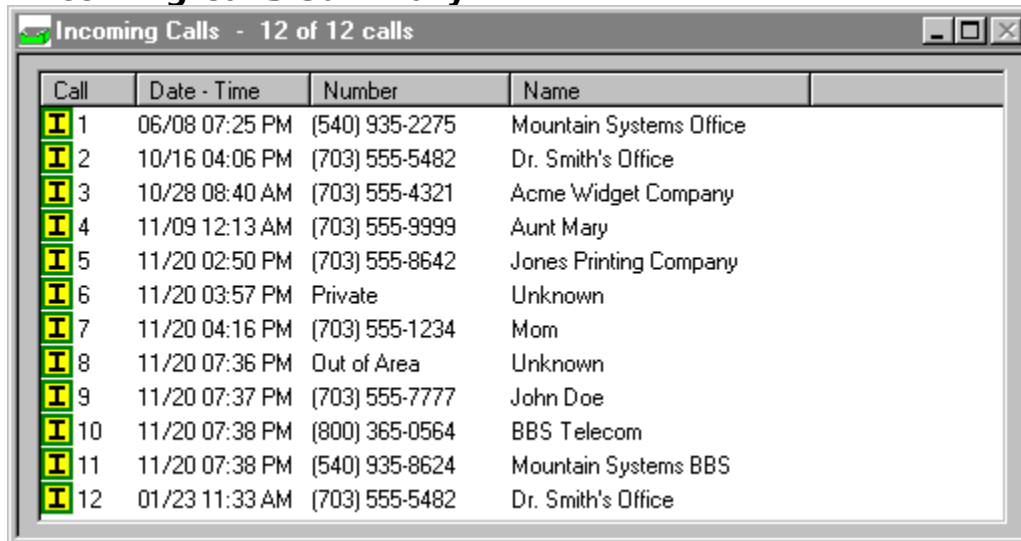
Detailed information on each incoming call, beyond that included on the Incoming Calls display, is stored in the CallAudit database. The Incoming Call Details dialog window provides a more detailed summary of this information. You can bring up this call details dialog window for any single call by placing the cursor on this call entry and double clicking the first mouse button.

You can review and/or update the information associated with each telephone number by selecting a single call record and then pressing the DB Details button on the button bar. This action will bring up the Database Details dialog display.

## Auditing Incoming And Outgoing Calls

The CallAudit main window provides separate summary displays for incoming and outgoing calls.

### Incoming Calls Summary



Call	Date - Time	Number	Name
1	06/08 07:25 PM	(540) 935-2275	Mountain Systems Office
2	10/16 04:06 PM	(703) 555-5482	Dr. Smith's Office
3	10/28 08:40 AM	(703) 555-4321	Acme Widget Company
4	11/09 12:13 AM	(703) 555-9999	Aunt Mary
5	11/20 02:50 PM	(703) 555-8642	Jones Printing Company
6	11/20 03:57 PM	Private	Unknown
7	11/20 04:16 PM	(703) 555-1234	Mom
8	11/20 07:36 PM	Out of Area	Unknown
9	11/20 07:37 PM	(703) 555-7777	John Doe
10	11/20 07:38 PM	(800) 365-0564	BBS Telecom
11	11/20 07:38 PM	(540) 935-8624	Mountain Systems BBS
12	01/23 11:33 AM	(703) 555-5482	Dr. Smith's Office

The Incoming Calls summary display provides one line of data in a scrolling list for each incoming call. An example of the Incoming Calls Display is shown below.

The displayed data includes time and date of the call, the caller telephone number (if available), and the caller name as it exists in your phone book. If Caller ID name service is in effect, the name as supplied by the telephone company will be used.

The total incoming calls counts for your current calls list is shown as part of the window title

Only calls for the current session are stored in this incoming list. A maximum of 1500 calls can be stored. You can further reduce this number using options in the System Preferences area.

### Getting Details on an Incoming Call

Detailed information on each incoming call, beyond that included on the Incoming Calls display, is stored in the CallAudit database. The [Incoming Call Details](#) dialog window provides a more detailed summary of this information. You can bring up this call details dialog window for any single call by placing the cursor on this call entry and double clicking the first mouse button.

### Deleting Incoming Calls

After incoming calls are reviewed, they should probably be deleted from the current calls list. CallAudit will automatically delete the oldest calls if the maximum number of calls is reached. You can delete incoming calls by any one of a number of methods.

- Use the Delete Call button on the Incoming Calls Details display
- Select the call using the mouse, and press the delete key
- Select the call using the mouse, and use the cut option in the Edit pull-down menu
- Use one of the other Delete Calls options in the Edit menu

One or more calls can be deleted at one time by using the mouse and the delete key. If you hold the mouse button down and sweep the cursor over one or more calls, each call will be highlighted. When the delete key is pressed, all highlighted calls will be deleted. You can delete a maximum of 125 calls at a time using this method.

### Operating in ICON Mode

CallAudit can operate in full display mode or icon mode. In full display mode the main window is shown in the main portion of your computer display area. The size and location are based on your inputs. All incoming summary display information is included as described in the Incoming Calls section.

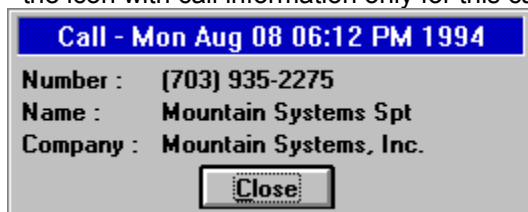


In icon mode CallAudit is displayed as a single icon usually at the lower left area of your computer display.

The text below the icon includes the name of the program and a count of the number of new calls since the last time the program was displayed in full display mode. This mode of operation allows CallAudit to continue to audit all incoming calls while using only a small portion of your computer display.

The program can be brought back to full display mode by either double clicking on the icon with the mouse or selecting the Restore option from the icon menu.

When an incoming call occurs during the icon mode of operation, a small dialog box can appear above the icon with call information only for this call.



This dialog window stays on the screen for approximately 30 seconds and then disappears automatically. See the [Call Defaults](#) system preferences section to select the option to have this popup dialog appear for each call.

The dialog box includes the date and time for this call in the dialog box title area. The number, name, and company information is displayed in the dialog box based on Caller ID information and data stored in your phone book database.

The dialog box also includes a Close button that you can use to close the dialog before the automatic timer closes it for you.

The dialog box includes the date and time for this call in the dialog box title area. The number, name, and company information is displayed in the dialog box based on Caller ID information and data stored in your phone book database. The dialog box also includes a Close button that you can use to close the dialog box before the automatic timer closes it for you.

### **Automatic Display of Caller Information**

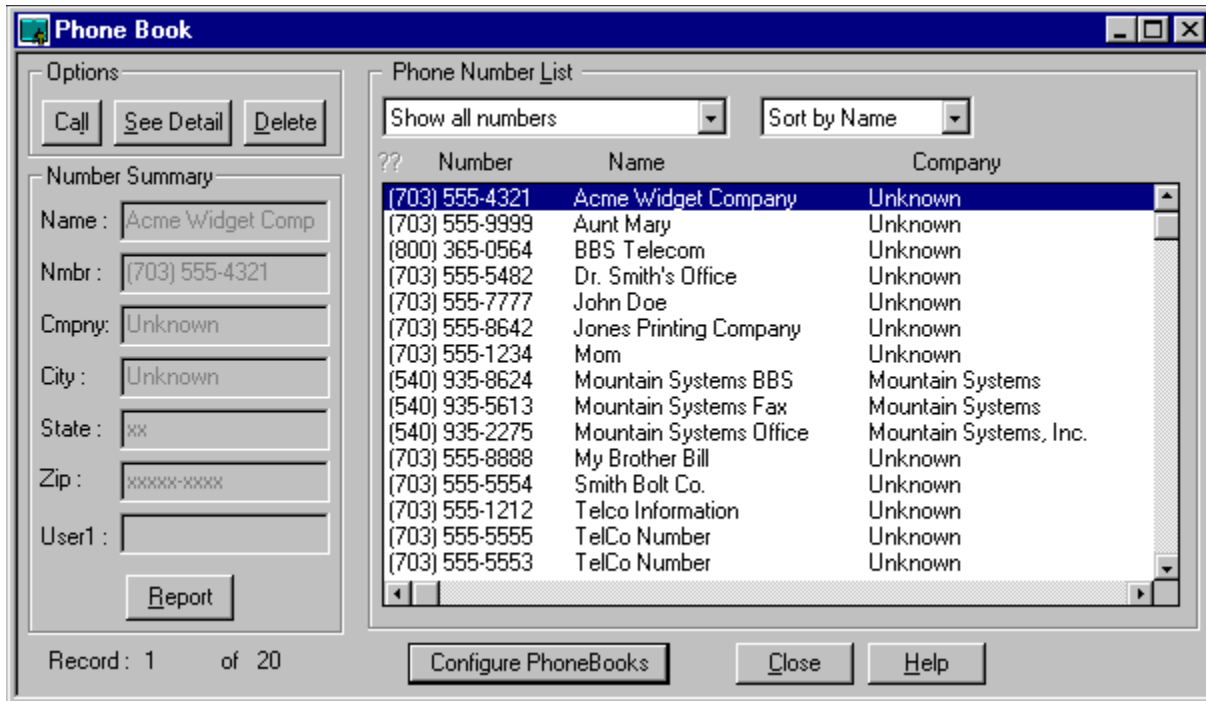
The CallAudit database includes a variety of information about each calling telephone number. Additional data about each number can also be stored in a Windows Notepad file. Each telephone number can have a separate Notepad data file. How you review and edit this information is covered in the Phone Book section later in this manual.

CallAudit includes the option to have this detailed information automatically displayed for each incoming call. This option allows you to see your calling number details on the screen before you answer the call.

### **Phone Book Information**

An example of the information stored in the Phone Book for a single telephone number is shown in Database Details display illustrated below.





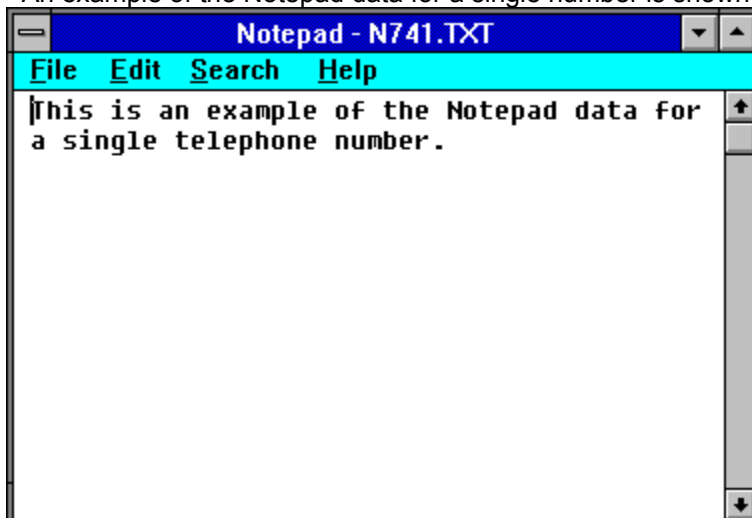
The Pop-up Phone Number Record check box determines if this display is automatically displayed for incoming calls from this number.

If this box is checked, and the database record updated, then this record will automatically be displayed each time a call comes in from this number.

An option in the System Preferences area also includes the choice to have all incoming calls always display this data regardless of the setting of the check box.

### **Notepad Information**

An example of the Notepad data for a single number is shown below.



The Notepad window title area includes the name of the Notepad text file for this telephone number. CallAudit automatically determines this text file name. The text in the Notepad file is based on whatever information you wish to enter for this number. After data is entered in this display, the Notepad Save option in the File Menu should be used to save the information. When saving this file always use the name supplied by CallAudit.

The Pop-up Notepad Data check box determines if the Notepad data for this number is automatically displayed for incoming calls. If this box is checked, and the database record updated, then this Notepad data will automatically be displayed each time a call occurs for this number.

An option in the System Preferences area also includes the choice to have all incoming calls always display this data regardless of the setting of the check box.

### **Getting Details on an Outgoing Call**

Detailed information on each outgoing call, beyond that included on the Outgoing Calls display, is stored in the CallAudit database. The Outgoing Call Details dialog window provides a more detailed summary of this information. You can bring up this call details dialog window for any single call by placing the cursor on this call entry and double clicking the first mouse button.

### **Deleting Outgoing Calls**

After outgoing calls are reviewed, they should probably be deleted from the current calls list. CallAudit will automatically delete the oldest calls if the maximum number of calls is reached. You can delete outgoing calls by any one of a number of methods.

- Use the Delete Call button on the Outgoing Call Details display
- Select the call using the mouse, and press the delete key
- Select the call using the mouse, and use the cut option in the Edit pull-down menu
- Use one of the other Delete Calls options in the Edit menu

One or more calls can be deleted at one time by using the mouse and the delete key. If you hold the mouse button down and sweep the cursor over one or more calls, each call will be highlighted. When the delete key is pressed, all highlighted calls will be deleted. You can delete a maximum of 125 calls at a time using this method.

### **Sort and View Options for Call Summaries**

A number of program options exist using the View pull-down menu to sort the actual current calls displayed. You can display only the calls that occurred today, or the last week (actually the last seven days), or this month, or this year, or all calls. If you select the view calls by day option, and CallAudit is still running when midnight occurs, the calls in your list will be adjusted accordingly with the new date.

Sort options also exist to sort the displayed calls ascending or descending. Calls can also be sorted by number and name. In each case a text line will be updated in the title area to reflect the number of calls displayed and the total number of calls present. Both the Incoming Calls and the Outgoing Calls windows have these sort and view options, and the settings for each are separate.

### **Printing Call Summaries**

The File pull-down menu provides complete options for printing the call summary displays. The Print Setup option allows you to select the printer you wish to use.

Options exist for Print Setup, Print Preview, and Print.

You can print a subset of the Incoming and Outgoing call log entries. First select the desired call log items, and then the print option. You can individually select up to 125 call records at a time for printing. If no items are selected, the entire list will be printed.

Use the Help button on these displays for more information about print options.

## Telephone Number Database Details

CallAudit stores a variety of information in the database about each telephone number known to your system. An example of the data maintained for each number is shown below.

The **Number Data** folder provides detailed information about the selected telephone number. The **Options** folder provides additional program options for the selected telephone number.

**Telephone Number Database Details**

**Number Data** | Options | Paging

Phone Number Data

Number : (540) 935-2275 Find Call Associated Number :

Dial Prefix : 1  Use Area Code FAX Number : xxx-xxx-xxxx

Name : Mountain Systems Office PhoneBook: Standard PhoneBook

Caller ID :  User 1 :

Company : Mountain Systems, Inc. User 2 :

Address : 153 Mimosa Street Comment : This is main Mountain Systems number.  
P.O. Box 830

City : Grundy

State : VA Zip: 24614

Last Incoming Call : Thu Jan 11 11:48 AM 1996  
Last Outgoing Call : Thu Jan 11 11:48 AM 1996 Last Update : Thu Feb 15 01:50 PM 1996

Update Add Delete Clear Search DDE Link Print

Close

Help

Update session ready - loaded with record

The fields in the Number Data area can be edited as desired.

Press the **Update** button to record your changes in the CallAudit database.

If you make changes to the telephone number itself, then the new number will either be updated or created as appropriate.

You can delete a telephone number record by pressing the **Delete** button.

You can add a telephone number record by pressing the **Add** button.

You can access the data in your DDE program by pressing the **DDE Link** button.

For DDE programs such as PhoneDisc, this action will retrieve any name and address information for this telephone number and update the current fields accordingly. If the current values in your record for these fields (name, address, city, state, zip) contain anything other than blanks or Unknown, no changes will be made. This allows you to edit desired fields and not have the DDE link changes these values.

For other DDE programs such as Symantec ACT!, this action will bring up the contact record from

that program. This allows you to access your records in your external program directly from the CallAudit PhoneBook records.

Press the **Print** button to print the current telephone number data.

Included at the bottom left is a single summary line to provide status for each update operation. Audio prompts are also provided as selected in the System Preferences.

Included below is a description of each of the editable fields in the Phone Number Data section.

### **Telephone Number Field**

The first field is the phone number for this record. It includes an area code as well as seven or more digits for the actual number. The dial prefix field is used if a prefix, such as 1 for long distance or 9 for an outside line, is required to dial the number. The Use Area Code check box determines whether the area code portion will be used when placing outgoing calls. Some areas of the US require that the area code always be used, even for local numbers, while other areas of the country will not allow the area code for calls to numbers in your local area.

This number field is used as the key field in the number database table for all access. Duplicate numbers cannot exist in the database.

### **Associated Telephone Number Field**

The associated telephone number field allows the user to associate the current record with another existing telephone number record. This can be particularly useful when using the DDE interface with programs such as Symantec ACT!. The CallAudit DDEMGR software allows the option to connect to the associated telephone number rather than the calling number. This allows the user to direct calls from more than one telephone number to the same telephone number information in their DDE support program (such as ACT!).

The default value for this field is 'None', which indicates that no number is associated. If you wish to associate with another number, enter the complete 10 digit number (including the area code).

### **Name and Address Information**

Additional fields are included for name, company, address, and other related information. Enter data into these fields as you desire. Any or all can be blank as desired.

The Caller ID field shows the name information supplied by the telephone company if you have Caller ID+ service (which provides both telephone number and name for calling parties). As this data is supplied directly by the telephone company, this field cannot be edited. If this field is blank then no data is being supplied by the telephone company for name information.

A comment field is also included (below the FAX Nnbr area) for up to 255 characters of comment data for this telephone number. Additional text data for this number can also be entered in a Notepad data file.

The date information at the bottom left shows the dates of the last incoming call, the last outgoing call, and the last time this data was updated.

### **Unlisted in Phone Book (only in CallAudit version 2.1 or earlier)**

This field determines whether a telephone number will show in your Phone Book display. Telephone numbers marked as unlisted will exist in the database, but will not display in your Phone Book. Telephone numbers not marked as unlisted will show in your Phone Book display.

### **PhoneBook (only in CallAudit version 3.0)**

This field determines in which PhoneBook the telephone number will appear. See the PhoneBook area for more information about the multiple phone book options in CallAudit 3.0.

### **User Data Fields**

CallAudit provides two user data fields labeled User 1 and User 2. You may use these fields to

include your own data about each telephone number record. Each field can hold up to 64 characters of text data. Enter your desired data and press the Update key to save the edited changes to the database.

The User 1 field is also displayed in the Phone Book search criteria area for the currently selected number.

### **Saving Edited Data**

Edited data is saved by pressing the Update button in the Phone Number Options area in the upper left portion of the display. A number record can be deleted by pressing the Delete button in this same area. If you enter a telephone number that does not currently exist in your database and press the Update key, a new record will be created with the data from the fields area.

### **Status Area**

A single line area is included at the lower left to provide status on the current number and most recent action. This status line will be updated each time an action is requested.

### **Printing your Phone Book Entries**

The File pull-down menu provides options for printing the Phone Book. Options exist for Print Setup, Print Preview, and Print.

The Print Setup option allows you to select the printer you wish to use.

The Print Preview option allows you to view the information before sending it to your printer.

The Print option will print the Phone Book entries.

Use the Help button on these displays for more information about print options.

### **Display Time**

The database details record will stay on the screen for a default length of 30 seconds. You can change this time value to a different value, or set the display to stay on the screen an indefinite time until you close it manually. To implement either of these changes, change the following line in the [Defaults] section of the CallAudit INI file (the file is named CALAUDIT.INI and is located in your standard Windows directory).

```
DetailsDisplayTime=15
```

The numeric value on the right is the number of seconds before the Telephone Number Details Record display is automatically closed. Use a value of 0 to keep the display open indefinitely, which means you have to close the window manually.

See the Options folder for additional program options for the selected telephone number.

## Telephone Number Options

The **Options** folder provides additional program options for the selected telephone number. The Number Data folder provides detailed information about the selected telephone number.

The screenshot shows a dialog box titled "Telephone Number Database Details" with a blue title bar and a close button. It has four tabs: "Number Data", "Options" (selected), "Paging", and "Call Costing".

**Caller Summary**

Number : (540) 935-2275  
Name : Mountain Systems Inc  
Company : Unknown

**Incoming Call Options**

- Popup Phone Number Record
- Popup Notepad Data
- Reject Incoming Calls
- Send E-Mail message

**Outgoing Call Options**

- Popup Phone Number Record
- Popup Notepad Data
- Send E-Mail message

**AudioTag**

Buttons: Play, Record, Delete

Hint: You can drag and drop WAV files directly on this form.

**Notepad Data**

Buttons: Edit, Create, Delete

Hint: You can drag and drop TXT files directly on this form.

Buttons: Update, Close, Help

The fields in the Option area can be edited as desired. Press the **Update** button to record your changes in the CallAudit database.

### AudioTag Data

The AudioTag area determines what audio file is used for incoming calls from this number. Audio sounds produced by CallAudit require that your system has a Windows compatible sound card or similar device installed. If this is not the case, then no sounds can be produced by CallAudit on your system. If a compatible sound device is installed, then CallAudit can provide audio prompts for incoming calls.

If no user supplied AudioTag file exists, then the actual phone number is “spoken” by the program on incoming calls. If an Audio Tag file exists, then this file will be played for incoming calls from this number.

If you wish to create an AudioTag file for a number press the Record button. The Windows SOUND.REC is the default recording device used by CallAudit to record AudioTag files. You may use any Windows compatible device that produces XXX.WAV sound files, which is what is used by CallAudit. After your AudioTag file is created, it will be used for incoming calls from this number.

If an AudioTag file exists for this number, then the Play and Delete button will be active. The Play

button can be used to listen to the currently stored AudioTag file for this number. The Delete button is used to delete the AudioTag file data for this number.

You can also produce the XXX.WAV audio file to be used for a telephone number with any other Window compatible sound recorder device. You can then use drag and drop to drop your sound file on this display window to have it selected as the desired Audio Tag File. Use the following steps for this process:

- 1) Use your desired sound software to record a WAV sound file. Any software that produces standard windows compatible WAV files will work.
- 2) Bring up the Telephone Number Record Details display for the selected telephone number.
- 3) Select the recorded WAV file from File Manager.
- 4) Use the left mouse button to drag the WAV file from the File Manager to the Telephone Number Record Details display. Release the mouse button when the file is over the Telephone Number Record Details display.

### **Notepad Data**

CallAudit includes the option for a separate Windows Notepad text file for each telephone number. This allows you to store up to 32K of additional data about this number in a separate area in your own format.

These Notepad files are stored in a special area in the CallAudit directory with a name assigned by CallAudit.

Use the Create button to create a Notepad file for this number. Use the Edit button to edit an existing Notepad file. Use the Delete button to delete the current Notepad file. The Edit and Delete buttons will only be enabled if a Notepad file exists for this number.

Use the Notepad Help option to get additional information about how to enter and edit data in a Windows Notepad file.

### **Incoming Calls Options**

The **Pop-up Phone Number Record** check box determines if this Telephone Number Details Record is displayed for incoming calls from this number. If this box is checked then this database record will automatically be displayed each time a call occurs from this number.

An option in the System Preferences area also includes the choice to have all incoming calls always display this data, regardless of the setting of the check box. This allows you to select this option once for all telephone numbers and always have the Pop-up Phone Number record appear for each incoming call.

The database record will stay on the screen for a default length of 30 seconds. You can change this time value to a different value, or set the display to stay on the screen an indefinite time until you close it manually. To implement either of these changes, change the following line in the [Defaults] section of the CallAudit INI file (the file is named CALAUDIT.INI and is located in your standard Windows directory).

```
DetailsDisplayTime=15
```

The numeric value on the right is the number of seconds before the Telephone Number Details Record display is automatically closed. Use a value of 0 to keep the display open indefinitely, which means you have to close the window manually.

The **Pop-up Notepad Data** check box determines if the Notepad data for this number is automatically displayed for incoming calls. If this box is checked, and the database record updated, then this Notepad data will automatically be displayed each time a call comes in from this number.

An option in the System Preferences area also includes the choice to have all incoming calls always display this data regardless of the setting of the check box. This allows you to select this option once for all telephone numbers and always have the Notepad Data appear for each incoming call.

The **Reject Incoming Calls** check box determines if incoming calls from this telephone are to be rejected. If this box is checked, then an incoming call from this number will be answered and then immediately hung up. This option allows you to eliminate calls from unwanted telephone numbers. Calls rejected will show the name as REJECTED CALL.

**Note:** This option is **not** possible with some Caller ID hardware devices supported by CallAudit. Serial devices such as the Rochelle ANI-232 Caller ID plug and many other similar non-MODEM devices do not offer this option. If this option is not supported by your hardware, this field will be disabled.

An option also exists to reject all incoming calls from first time callers. This feature can be advantageous to locations that need to accept incoming calls ONLY from a known set of telephone numbers. When this option is selected, all incoming calls from telephone numbers that have not called you before will be rejected. They will continue to be rejected in the future as well until you turn off the "Reject Incoming Calls" option for their number.

This reject all new callers option is selected by adding the following line to the [Defaults] section of the CallAudit INI file.

```
HangUpOnNewCallers=1
```

The CallAudit INI file is located in your Windows directory ( which is usually C:\WINDOWS ) and the CallAudit INI file name is CALAUDIT.INI. To add this feature, edit this file and add the above line to the [Defaults] section.

An option also exists to reject incoming calls based on partial telephone number strings. Using this option for example, the user could block all calls from numbers that start with 703935 or 21453122, etc. This allows the user to block all calls from an area code, particular exchange, or numbers starting with a subset of digits. Calls rejected using this approach will show the name as REJECTED CALL (Blocking.txt).

CallAudit uses a single text file for the source of any number prefixes to be used for blocking. This file is named BLOCKING.TXT and should be located in your standard CallAudit directory (which is usually C:\CALAUDIT). See the [Call Blocking Prefixes](#) section for more information on how to edit this data.

Select the **Send E-Mail message** option to automatically send an electronic mail message for each incoming call from this number. See the [System Preferences E-Mail](#) section for more information about setting up your E-Mail connection.

Note: E-Mail is an option only available in CallAudit Version 3.0 or later. E-Mail options are only available when using Windows 95 or Windows NT.

## Outgoing Calls Options

The **Pop-up Phone Number Record** check box determines if this Telephone Number Details Record is displayed for outgoing calls from this number. If this box is checked then this database record will automatically be displayed each time a call occurs from this number.

The **Pop-up Notepad Data** check box determines if the Notepad data for this number is automatically displayed for outgoing calls. If this box is checked, and the database record updated, then this Notepad data will automatically be displayed each time a call occurs from this number.

Select the **Send E-Mail message** option to automatically send an electronic mail message for each outgoing call for this number. See the [System Preferences E-Mail](#) section for more information about setting up your E-Mail connection.



Note: E-Mail is an option only available in CallAudit Version 3.0 or later. E-Mail options are only available when using Windows 95 or Windows NT.

## Call Blocking Options

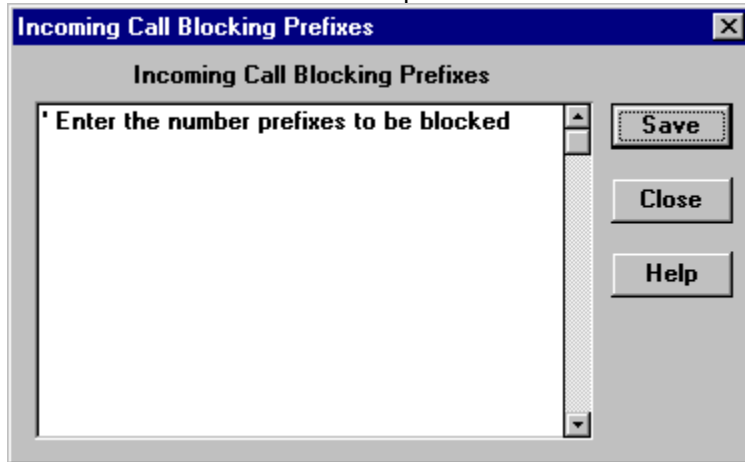
CallAudit can block incoming calls by telephone number, or block all calls from telephone numbers not in the PhoneBook database. The second option is used to enforce security where only calls from known numbers are to be accepted.

Select the **Block only numbers marked** option to block incoming calls from individually marked telephone numbers or numbers that match a call blocking prefix.

Select the **Block if not in PhoneBook** option to block incoming calls from any telephone number that is not already in the CallAudit PhoneBook database.

## Call Blocking Prefixes

CallAudit includes the option to reject incoming calls based on partial telephone number strings or prefixes. Using this option for example, the user could block all calls from numbers that start with 703935 or 21453122, etc. This allows the user to block all calls from an area code, particular exchange, or numbers starting with a subset of digits. Calls rejected using this approach will show the name as 'REJECTED CALL via prefixes'.



Select the **Call Blocking Prefixes** option from the **Edit** menu to edit call blocking prefixes. Include in this list any prefixes that you wish to be blocked.

Press the **Save** button to save your changes.

## Call Costs

CallAudit MultiLine software support call costing. One or more rate structures can be created. A rate structure consists of six rates, each determining the cost per minute for call duration based on the time and day of the call. Rate values include day, evening, night, and weekend day, evening, and night. See the [Call Rates](#) section for more information about defining rate structures.

A single rate structure can be applied against a incoming or outgoing call to calculate approximate call costs. Each telephone number can have a default rate structure associated. The Incoming Call Details Call Costs display will show the costs based on the current default setting.

Select an alternate rate structure to show the costs for the currently selected call.

## Call Rates

CallAudit MultiLine software support call costing. One or more rate structures can be created. A rate structure consists of six rates, each determining the cost per minute for call duration based on the time and day of the call. Rate values include day, evening, night, and weekend day, evening, and night. See the Call Costs section for more information about applying rates to existing incoming and outgoing calls.

Each rate structure includes a rate title and rate description. All rate values are in \$ per minute. Use the **Rate Options** buttons to create/modify rate information.

Each telephone number can be associated with a single rate structure. Select the desired rate structure and press the **Update** button (in upper right area of display) to associate the selected rate structure with the current telephone number.

### Rate Options

Press the **Add** button to add a new rate structure.

Press the **Delete** button to delete the currently selected rate structure.

Press the **Update** button to update the selected rate structure with the current data.

## Trouble Shooting

If problems arise when using CallAudit consult this users manual or program help files first for assistance. The most common problem areas are described below, along with suggestions to solve them.

### MODEM Initialization Problems

Consult you MODEM or serial device manual to determine the recommended initialization settings. See if these options will solve the problem.

If you have modified the default initialization string, restore the default value and see if the problem persists. See the [Installation and Setup](#) or [System Preferences](#) sections for more details on MODEM setup strings.

In some cases the normal method of establishing communication between CallAudit and your MODEM will not work. The [Other Program Options](#) section describes other options for resolving this type of problem.

### Communications Port Conflicts

The most common cause is that you have assigned two different devices in your computer the same communications port number. This will usually cause a conflict situation. If this is the case, consult your serial device manual to determine how to choose a different communications port.

Communications port conflicts can also arise from assigning the same IRQ to two devices. This will almost always cause problems in Windows. Any time you make changes to the IRQ assignments for a device, be sure the same change is made in the Ports section of the Windows Control Panel. For example if you change the IRQ settings on a MODEM card from IRQ 4 to IRQ 5, make the same change in the Ports section of the Windows Control Panel.

### No Caller ID Information Displays

If telephone calls occur, and all you see on the Incoming Calls display is Unknown for number and name, then a problem exists with your MODEM and/or telephone service.

CallAudit requires a MODEM or serial device that supports Caller ID and Caller ID service from your telephone company. If either of these is missing, CallAudit cannot determine the telephone number of someone calling your line. See the [Installation and Setup](#) or [System Preferences](#) sections for more details on MODEM selection. Contact your telephone company for information on providing Caller ID service to your telephone lines.

Use the following steps to test the Caller ID capabilities of your MODEM.

- 1) Exit CallAudit.
- 1) Start the Windows Terminal program (usually located in the accessories folder). You can also use other data programs such as ProComm+. Windows 95 users may need to use the Hyper Terminal program, as Terminal is not always available.
- 3) Use the Communications option under the Settings menu to select the Com port for your MODEM.
- 4) Enter the Caller ID setup string (usually AT#CID=1 for most MODEMS).
- 5) If an error results, your MODEM probably does not support Caller ID. If OK results, continue.
- 6) While Terminal is still running, have someone local call you. Let the telephone ring two or three times. One of two situations will result:
  - A. The word RING will appear for each telephone ring. No other data appears.

B. The word RING will appear once. Three or four other data lines (TIME = 1234, DATE = 1022, NMBR = 7039352275, etc) will appear. The word RING will appear again.

If case A results, your MODEM does not support Caller ID. If case B results, your MODEM supports Caller ID and should work correctly with CallAudit.

If you are using CallAudit with the Whozz Calling? single line device, see the [Testing the Whozz Calling? Single Line Device](#) portion of the [Helpful Hints](#) section for more information on how to test this hardware device.

## **Duplicate or Ghost Calls**

Duplicate calls (ghost calls) for each incoming call can sometimes occur depending on the length of the telephone ring cycle for your telephone company. Ghost calls usually show as a second call with the same time and date, but with a No-CallerID telephone number.

CallAudit uses the length of time from the last telephone ring to determine when an incoming call is completed (most all single line hardware such as MODEMS has no other means to make this determination). The normal ring cycle is six seconds (two seconds of ring and four seconds of silence) for most telephone systems.

When CallAudit has not processed a ring event in a fixed amount of time (the default used is 8 seconds), then the call is ended. If your ring cycle is different, or your computer is somewhat slow, it may take longer than 8 seconds to complete the overall ring cycle processing. If an incoming call continues to ring, then the next ring will be seen as a new call. As the Caller ID data has already been sent once, it will show as a second ghost call.

If you see this situation, make the following changes:

1. Edit the CallAudit INI file, which is in the windows directory. This file is CalAud32.INI for the 32 bit version and CalAud30.INI for the 16-bit version.
2. Locate the defaults section
3. Change the value of the following line to a larger number

LastRingDelayTime=8

The value is expressed in seconds. Try a value of 10 or 12 seconds.

## **System Sounds Don't Work**

You must have a Windows compatible sound board (or similar device) and attached speakers connected to your computer for sound events to function. CallAudit cannot produce sound events by using only the internal speaker in your computer. See the [System Preferences](#) section for more details on system sounds.

## **Phone Book Changes Don't Take Effect**

Be sure you press the update button after any changes are made to the Phone Book Details display. If you make changes, and close the window without pressing the update key, your changes will be lost.

You can also look at the date of last change field to see if your changes are taking effect. This date is updated after each successful database update.

## **ODBC Errors Appear**

If ODBC database update errors appear when performing an update operation, check the SHARE.EXE setting in your AUTOEXEC.BAT or CONFIG.SYS file. Windows 3.1 system need at least 100 locks for ODBC updates to work correctly. Without this change to your system files, no database updates can be performed.

Additional data is included on the use of SHARE.EXE in the software setup portion of the [Installation and Setup](#) section.

CallAudit uses a number of dynamic link libraries (DLL) to process database information. The installation and setup process for CallAudit installs a number of ODBC related DLLs in your \WINDOWS\SYSTEM directory on your hard disk. If older out of date versions of these same DLLs are present in your \WINDOWS directory, then CallAudit may not execute properly. The most common sign of this problem is an “Internal Error” message box when first starting CallAudit. If this occurs, search through your windows directory to see if any of the following files are present:

ODBC.DLL  
ODBCINST.DLL  
ODBCCURS.DLL  
SIMBA.DLL

If any of these files are present in your Windows directory then either rename them or delete them. CallAudit needs the correct version of each of these files to be located in the \WINDOWS\SYSTEM directory. These files were copied to the \WINDOWS\SYSTEM directory when CallAudit was installed.

CallAudit also relies on database related entries in the ODBC.INI file which is located in your \WINDOWS directory. The installation and setup process automatically edits this file and attempts to insert the correct lines. If this file was incorrectly formatted before the CallAudit installation began, the setup process may not be able to correctly edit the file.

CallAudit requires two set of lines to be included in the ODBC.INI file. The first is near the top of the file and should have the form:

```
[ODBC Data Sources]
CallAudit=Access Data (*.mdb)
```

Other similar lines for other programs may also be in this “ODBC Data Sources” section and should not be altered or removed.

The second set of lines is usually near the bottom of the file and should have the form:

```
[CallAudit]
Driver=C:\WINDOWS\SYSTEM\SIMBA.DLL
Description=Access Database for CallAudit
FileType=RedISAM
DataDirectory=C:\CALAUDIT\calaudit.mdb
SingleUser=False
UseSystemDB=False
```

The “DataDirectory” line in this section should contain the directory location you selected during the installation and setup process for CallAudit.

If any of these lines are not in your ODBC.INI file, manually insert them using the Windows Notepad editor and try CallAudit again.

## **Internal ODBC Error**

When CallAudit starts, it first reads the valid MODEM list from the CallAudit database. Microsoft ODBC software is used for this task. If old versions of the ODBC.DLL files exist within your Windows directory, an “Internal ODBC Error” message will appear. See the **ODBC Errors Appear** section above for more details on how to solve this problem.

## **AudioTag Files Don't Play**

A Windows compatible sound device is required to support the playing of AudioTag files. See Sounds part of the [System Preferences](#) section for more data.

If you have a sound device, be sure you save the changes to your AudioTag files when you record them.



Depending on the recording program you use, the Save option under the File menu is usually the best way to save changes. Be sure you DO NOT change either the file name or directory locations as these are determined directly by CallAudit.

### **Notepad Date Doesn't Get Updated**

Any changes you make to a Notepad data file must be saved before the Notepad is closed. Use the Notepad Save option under the File menu to save your changes. Be sure you DO NOT change either the file name or directory locations as these are determined directly by CallAudit.

### **Out of Memory Messages**

Out of memory messages appear if insufficient memory exists in your system to perform the requested operation. Each program, window and other activity in your system uses different types of system memory. If this message appears, close one or more windows or other applications and try the operation again.

### **Generate Reports Display Scrolls Slowly**

Executing a CallAudit report can generate thousands of records. The Report Generator results window uses a virtual list technology to handle an arbitrarily large results set. One side effect of this capability is slower scrolling. If you move the scroll selector to a different position, it can take several seconds for the software to bring your requested data into view.

### **Phone Book Display Scrolls Slowly**

The Phone Book can include thousands of records. The Phone Book window uses a virtual list technology to handle an arbitrarily large record set. One side effect of this capability is slower scrolling. If you move the scroll selector to a different position, it can take several seconds for the software to bring your requested data into view.

### **Database Updates Are Slow**

CallAudit uses the Microsoft Open Data Base Connectivity (ODBC) standards for all database software support. Any time a database update occurs (such as a telephone number update, processing during an incoming call, or adding a telephone number to the speed dial set) CallAudit makes calls to ODBC software. ODBC uses a significant amount of disk input/output to perform its functions.

ODBC software runs slow on many systems that have little or no disk cache defined. The DOS program SMARTDRV.EXE is used on many standard Windows systems to configure and manage cache memory. For example a system with little or no cache memory defined, may require as much as 10-12 seconds to add a telephone number to the CallAudit speed dial list. The same system will only take 1-2 seconds for the same operation when the cache memory is defined.

Additional data is included on the use of SMARTDRV.EXE in the software setup portion of the [Installation and Setup](#) section.

### **Conflicts With Other Communications Software**

CallAudit uses Microsoft windows communications software to "talk" to your MODEM or serial device. It does this by first opening the selected Com Port and then issuing a series of setup strings to setup the MODEM up for Caller ID operation.

Within Microsoft Windows, only one communications software program can open a single Com Port at the same time. If you have FAX software that uses Com Port 2 to answer the telephone and accept incoming Fax transmissions, then CallAudit cannot execute using

Com Port 2 at the same time. If the Fax software is running when you start CallAudit, you will get a "Com Port in Use" error when CallAudit attempts to open the selected Com Port. To have both programs operating at the same time requires two separate MODEMs or serial devices. One for the Fax software and one for CallAudit.

A single computer can have multiple MODEMs or serial devices. All can be in use at the same time without any adverse effects. Two or more MODEMs can even monitor the same telephone line without any problems. The key point is that two software programs cannot open the same Com Port at the same time. This applies to Fax software, voice mail software and any other windows program that use the standard Microsoft communications software interfaces.

### **Conflicts With QEMM Memory Manager**

The Stealth mode of QEMM has been reported to cause problems with the proper operation of CallAudit. When this mode of QEMM is used CallAudit may hang on exit. If this occurs disable this feature of QEMM.

### **When All Else Fails**

CallAudit is developed and marketed by Mountain Systems, Inc. See the [Technical Support](#) section for information on how to contact Mountain Systems.

## Test Dialog

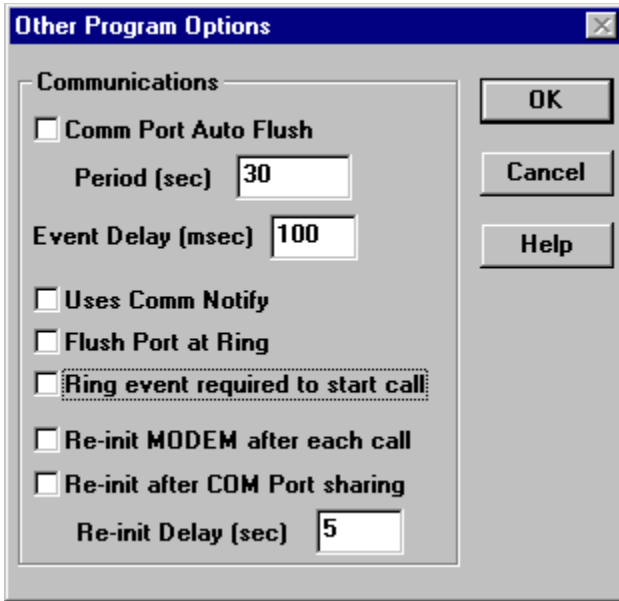
The test dialog provides a quick way to test your MODEM and sound systems with CallAudit.



The Name and Number fields data will be passed to your MODEM as if an incoming call from that number had occurred. Enter the desired Name and Number information and press the Test Ring Simulation button to start the process.

## Other Program Options

Use this display screen to select other program options dealing with the data communications portion of the CallAudit software. This display is selected by first pressing the System Preferences button on the button bar, and then choosing the Other Program Options item in the Edit menu (the Edit menu is located on the menu bar, not the button bar).



The **Comm Port Flush** option provides an automatic means to keep your MODEM comm port clear of unwanted characters that may leak in during long periods of inactivity.

If you have two telephone lines, activity on one line can cause unwanted characters to appear in the input port of the other line. Similar results can also occur when using some sound utilities and some DOS games. This extra data will cause CallAudit to incorrectly handle incoming call details.

This option allows CallAudit to periodically flush out the incoming data buffer. Flush actions only occur during periods of idle time in your PC and will not interfere with the operation of any other programs you may use. Using this option is the default setting for CallAudit.

The **Period (sec)** option determines the frequency of this automatic flush operation. It can be as short as 10 seconds and no larger than 500 seconds. The default value is 30 seconds.

The **Event Delay (msec)** option sets a delay value used during the MODEM initialization process. This value introduces a delay at each step of the process to allow the results of the previous step to fully complete with the MODEM hardware. Some MODEMs and/or computers need a larger value to establish communications with the MODEM. The default value is 100 msec (1/10 of a second).

The **Flush Port at Ring** option forces CallAudit to flush the communications port after the first ring event. The option is useful for some hardware situations where line noise can cause incorrect characters to be read instead of the Caller ID data. This option should not be used unless problems occur with line noise. This choice is not available for hardware that does not either require or support this option.

The **Use Comm Notify** option forces CallAudit to only process input from your Caller ID hardware when data arrives. This approach uses the least system resources, but does not

work for all combinations of hardware, software, and Windows operating systems. If you select this option and experience problems, then disable this choice. If this option is not selected, CallAudit uses a polling approach where the device is polled periodically to see if any data has arrived.

The **Ring event required to start call** option forces CallAudit to only start an incoming call when a ring event is received from MODEM devices. Normally if CallAudit see the RING string come across the MODEM, a new call is started. This processing is necessary for some MODEMs that never provide ring events.

This option can be useful when using your MODEM with other communications software at the same time with CallAudit. Connecting to the Internet or other similar services can generate fake calls when the word RING appears. Turning on this option can avoid these problems, and sometimes other communications problems when sharing the MODEM with other software.

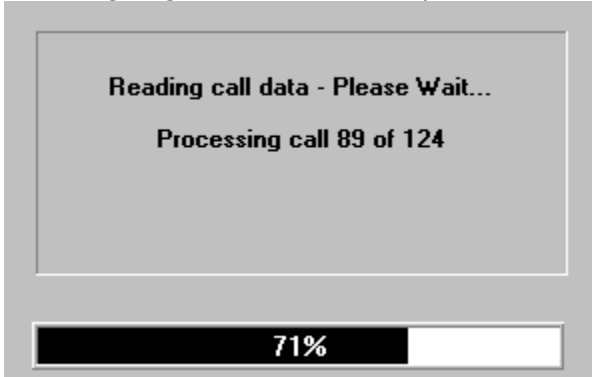
The **Re-init MODEM after each call** option forces a complete re-initialization of the MODEM after the completion of each incoming call. Some MODEMs (some Boca models for example) lose their Caller ID initialization after 1-2 incoming calls. Enabling this option forces the CallAudit software to re-initialize the MODEM after each call, and avoiding this problem.

The **Re-init MODEM after COM Port sharing** option forces a complete re-initialization of the MODEM (just for the Caller ID portion) after another communications program opens a shared port. Using this option with some communications software (the CompuServe WinCim program for example) will result in communications problems. Use this option only when it is not possible to add the Caller ID portion of the CallAudit setup string to the other communications software program.

The **Re-init Delay (sec)** option sets a delay value in seconds used during the MODEM re-attachment and initialization process for shared ports. This value represents the delay in seconds after the last action from the shared communications software before the re-attachment or re-initialization is performed.

## Message Box

The message box is displayed during any CallAudit action that will take longer than a few seconds. This display indicates that CallAudit is busy processing the current event and is NOT accepting other user inputs. Note that the CallAudit menu items are disabled during this time period to prevent the user from requesting other events that would conflict with the ongoing action. An example of the message box display is shown below:



The message box includes a central text message indicating the action being performed. In many cases a percentage complete progress bar is also included. This will be updated as the processing continues to show the ongoing status of the action.

The example shown above is when the Outgoing Calls button on the button bar is pressed for the first time. The message indicates that the database information for all current outgoing calls is being read one record at a time. The message indicates that 124 total calls are in the current list, that call 89 is currently being processed, and that the action is 71% complete.

## CallAudit Database Repair

All CallAudit data is stored in the CallAudit database. This database can become corrupted in various ways. The most common is a power failure that occurs during a database update. This has the effect of creating a partial record that the software cannot read.

The CallAudit database can be repaired by selecting the **Repair Database** option from the **Actions** menu available from the **Incoming Calls** display. This will repair any existing problems.

## Technical Support

CallAudit is developed and marketed by Mountain Systems, Inc. Technical information and support can be obtained by calling (540) 935-2275.

Further information is also available on the Mountain Systems BBS, which can be reached at (540) 935-8624.

Mountain Systems can also be reached via the following:

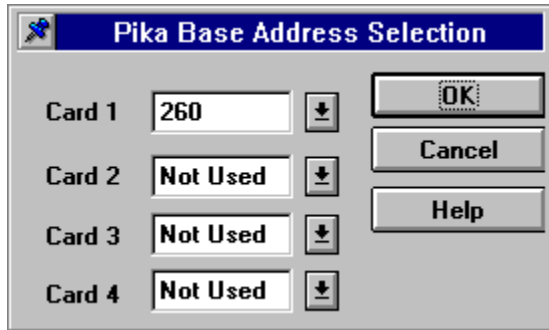
CompuServe:	73140,3510
Internet:	<a href="http://www.naxs.com/mtnsys">http://www.naxs.com/mtnsys</a>
E-Mail:	<a href="mailto:msi@naxs.com">msi@naxs.com</a>

You can send requests for help or other information to the CompuServe or internet E-Mail addresses. Mountain Systems will respond using the same method.



## Pika Base Address Selection

The Pika Base Address Selection dialog is used to set the base addresses for the Pika Caller ID card to be used in Windows. For each Pika Caller ID interface card, select the base address used in the AUTOEXEC.BAT file to load the card. An example of this display is shown below.



Select the "Not Used" option for cards 2-4, if the card is not currently installed.

# Report Parameters

Report parameters are viewed and edited using tabbed dialogs. A tabbed dialog exists for **Report Description**, **Search options**, and **Sort and Display** options.

An example of the for **Report Description** dialog is shown below.

The image shows a software dialog box titled "Report Parameters" with a blue header bar. Below the header are three tabs: "Description" (selected), "Search", and "Sort and Display". The "Description" tab contains the following fields and controls:

- Name :** A text input field containing "Area code 703 report." with a blue selection highlight.
- Description :** A large text area containing the text: "This report shows how to retrieve the telephone records for a single area code. The result show selected fields sorted by Name."
- Title :** A text input field containing "Telephone Numbers from Area Code 703".
- Buttons:** A vertical stack of four buttons on the right side: "OK", "Cancel", "Execute", and "Help".

The **Name** field provides a short description of this report.

The **Description** field includes up to 255 characters of additional information describing this report.

The **Report Title** is the heading text that will be displayed above the actual report results.

An example of the for **Search** options dialog is shown below.

**Report Parameters**

Description Search Sort and Display

**Search Options**

Report Type : Phone Number Report

By Telephone Number 703

By Number Type Listed & Unlisted

By Name No Name

By Call Type

By Phone Line All Lines

By Start Date 11/28/94

By Stop Date 11/28/94

By User1 Field

By Post Call DTMF

Max Record Limit 100

OK

Cancel

Execute

Help

### Search Options

The Search Options section includes a number of parameters that determine what records will be returned from the CallAudit database.

The **Report Type** parameter determines whether a report will be generated against the call history section of the database or the phone book portion. The call history tables include entries for all incoming and outgoing calls.

The By xxx toggle button determines whether each of the included fields will be used to select records from the database.

For example using the **By Telephone Number** choice and the value 703 will retrieve all calls or phone numbers from area code 703. If (703) 935-22 is entered, then all calls from numbers beginning with 70393522 will be retrieved. Any formatting characters (such as (, ), or -) are removed from the number string before the search is executed.

The wildcard character \_ (underscore) is also available to wildcard a single character. For example to retrieve all numbers from area code 703 that end in 123, enter the criteria 703\_\_\_\_123 ( digits 703, 4 underscore characters, and digits 123).

Note that special characters such as ', ", or other similar format or punctuation characters may cause query errors. Some of these characters have special meaning in SQL and using them in a query will generally cause problems.

The **By Number Type** parameter determines whether listed, unlisted, or associated telephone numbers will be included in the report.

When the associated number option is selected, the report will find all those telephone numbers that are associated with the telephone number entered in the **By Telephone Number** field. To use this option, first enter the desired number in the **By Telephone Number** field, and then de-select the **By Telephone Number** choice.

The **By Call Type** parameter determines the types of calls that will be retrieved for call history reports.

The options are for incoming calls, outgoing calls, or both incoming and outgoing calls. The By Data Type option is only available for call history reports.

The **By Phone Line** option determines the telephone line to be used in retrieving call history records. The valid values are Line 1, Line 2, or Line 1+2. The By Phone Line option is only available for call history reports and when two MODEM devices are being used.

The **By Date Range** option determines the date range for a call history report. Use this option to execute reports for common date ranges such as This Week, Last Week, etc.

When this option is used, the manual start and stop date options below are not available.

The **By Start Date** and **By Stop Date** determine the start and stop dates for reports on incoming and/or outgoing calls. . The By Start Date and By Stop Date options are only available for call history reports

Select the By Start Date toggle button to enter a start date. You can enter the start date directly into the date field or use the Calendar option to visually select a start date. Only records with a date greater than or equal to the start date will be retrieved. An example of the calendar display is shown below.

The **By User1** parameter determines whether telephone numbers will be retrieved that match the User1 search value.

The **By Post Call DTMF** parameter determines whether call history records will be retrieved that match the DTMF search value. This option is only available with the CallAudit multiple line software when used with multiple line hardware that captures and reports touch tone digits entered by the caller after the telephone is answered.

October 1994						
So	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Select the By Stop Date toggle button to enter a stop date. You can enter the stop date directly into the date field or use the Calendar option to visually select a stop date. Only records with a date less than or equal to the stop date will be retrieved.

An example of the for **Sort and Display** options dialog is shown below.

**Report Parameters**

Description Search **Sort and Display**

**Show**

Date  City  State  Zip  
 Phone Line  Fax Number  
 Call Duration  Comment  Call notes  
 Call Type  User1  User2  
 Number  Post Call DTMF  
 Name  
 Company  
 Address

**Sort Options**

Sort by : Name Order : Ascending

OK  
Cancel  
Execute  
Help

### Display Options

The Display options section determines what data fields will be displayed in the report result. Press the toggle button beside each field you wish to be included in the report. The selection of the display options will also effect what fields may be exported for use in other external software.

### Sort Options

Report records can be sorted on one field in either ascending or descending order. Select the desired option using the pull-down menu choices.

## Generating Call Reports

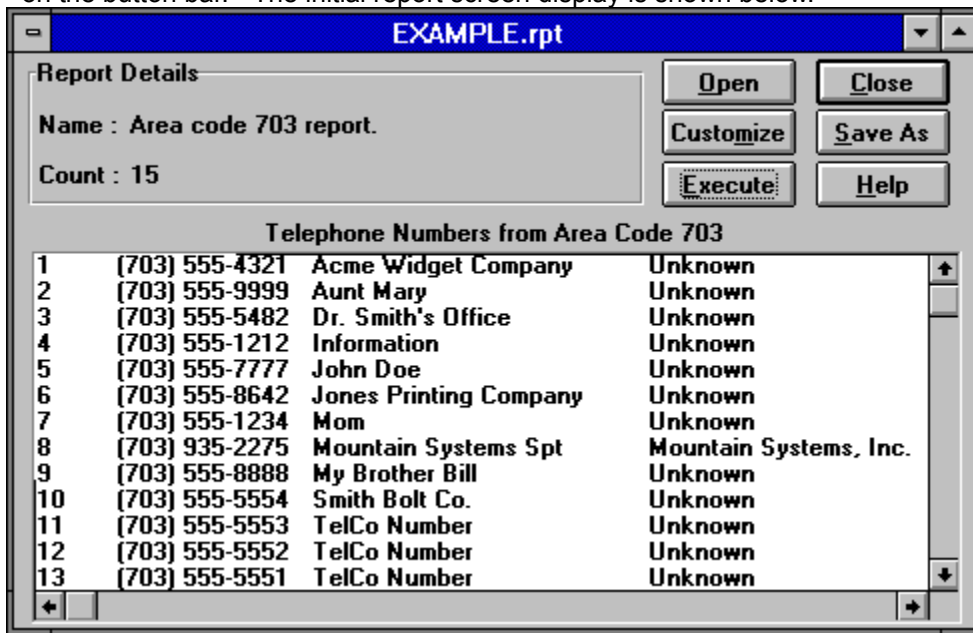
CallAudit provides a number of options for generating call reports from the CallAudit database. Reports can be generated for incoming calls, outgoing calls, incoming and outgoing calls combined, and the phone book.

For each report you have options for the search criteria, what data fields are to be shown for each record, and how the records are sorted. Once reports are generated they can be viewed, printed, or saved to files. Report definitions can be named and saved to your DOS file system, and recalled at a later time for execution.

### Creating A New Report

Reports can be created directly in the Reports section or indirectly from other CallAudit software areas such as the [Phone Book](#).

To create a report directly, choose the Reports option from the menu system or press the Reports button on the button bar. The initial report screen display is shown below.



A report must be customized, using the [Report Parameters](#) screen, before it can be executed.

The customization step determines the criteria that will be used to search the database, the selection of the data fields that will be displayed for the returned database records, how the data will be sorted, and the title of the report.

### Executing A Report

Press the Execute button to execute the current report. This option exists on both the Report Generation and the [Report Parameters](#) displays. Execution time can vary depending on the size of your database and the search criteria selected. Message boxes will appear to provide information on the progress of the report. When completed, the results list will include one line for each record returned from the database that matched your selection criteria.

CallAudit uses a virtual list technology to manage the size of the Call Reports results list. Only the items displayed on the screen are managed inside the Windows memory area. The result is the ability to handle an arbitrarily large results set without undue memory requirements.

## **Saving A Report**

Once a report is defined through the Report Parameters display, it can be named and saved for later execution. When a report is saved, only the report definition and parameters are saved. Report results are NOT saved with the report definitions.

Reports are saved in the DOS file system in a special format for CallAudit. Do not attempt to edit these files outside of CallAudit.

Select the Save As button on the Report Generation window to save the current report.

## **Opening An Existing Report**

An existing report can be recalled for execution. Press the Open button on the Report Generation window to open an existing report.

A single example report is included with the initial CallAudit installation. Additional reports must first be created and stored before they can be used.

## **Printing Report Results**

Generated reports can be printed using the standard Print, Print Setup, and Print Preview options from the File Menu.

## **Exporting Report Results**

Once report results are generated, they can be exported for use in other external software. Select the Export Records option from the Action menu to export the current record set.

Exported data is tab delimited with double quotes. Use the Report Parameters Show section to select the fields to be exported.

## **Deleting Database Records**

The records associated with the report results can be deleted from the CallAudit database. Use the Delete Records option from the Edit menu to delete the records for the currently executed report.

This option can be used to delete call history records or telephone number records. All records from the current report are deleted.

Once records are deleted they cannot be recalled, so use this option with care.

## **Adding Report Results to the Auto Dial Callback List**

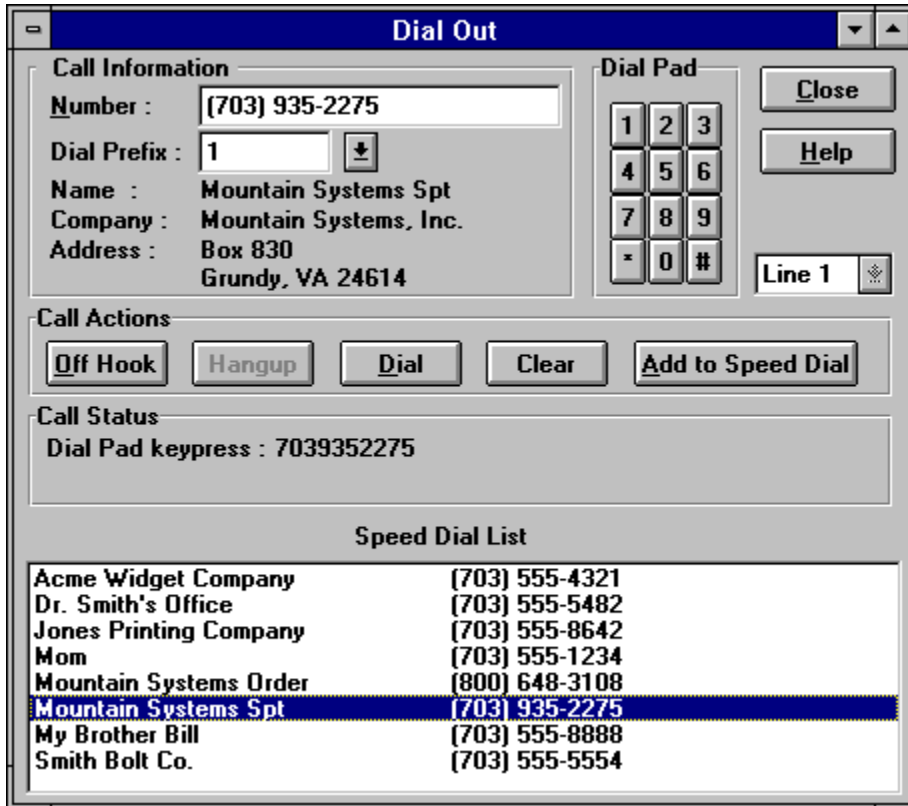
Once report results are generated, they can be added to the Auto Dial Callback List. Select the **Records to Auto Dial List** option from the **Actions** menu to add the current record set.

# Placing Outgoing Calls

CallAudit can place outgoing calls using the dial capabilities of your MODEM or serial device. Outgoing calls can be placed in any of the following ways:

- By pressing the Call button on the current window (many windows include a Call button)
- By pressing the Dial Out button on the main window button bar
- By using the Dial button on the Dial Out window

The Dial Out display is used to manage the placement of outgoing calls. An example of this display is shown below.



## Placing a Call

Press the Dial button to place a call to the current telephone number shown. The Call Status area will show the call progress area including call duration.

Double click on any of the speed dial entries to immediately dial that number. Single clicking on a speed dial number will load it into the dial window without dialing.

When the call is completed, press the Hangup button to signal the end of the call.

## Entering a Telephone Number

Use the dial pad or keyboard to directly enter a number. Numbers may be entered as digits, as letters, or as a combination of digits and letters. For example a telephone number entered at 800 CALL JIM would result in dialing the number 800 225-5546. Letter entry will be converted to the correct dial digits before the call is placed.

## Selecting a Dial Prefix



You can use a dial prefix for specialized telephone features (such as \*67, which blocks your telephone number in many telephone companies, or 1 to dial long distance). Dial prefixes can be entered directly in the number field, directly in the Dial Prefix field, or selected using the Dial Prefix pulldown option box.

You can use one of the supplied dial prefixes by selecting from the Dial Prefix pulldown, or by entering your desired dial prefix directly in the Dial Prefix field. Any new dial prefix values you enter directly will automatically be added to the prefix list (this data is stored in the prefix.txt file in the CALAUDIT directory). Your new values will be saved and restored each time you use the Dial Out window.

To enter the prefix in the same area as the telephone number, enter this prefix string and separate it from the remainder of the number to be dialed with a comma. Specialized dial prefixes can include the \* and # keys as well as any combination of digits. Thus to enable blocking and dial a long distance number, you would enter

\*67, 1 703 555 1212

### **Using Dial Out From Other Program Areas**

If a telephone number had already been selected when a Call or Dial Out button was selected, then this record will be displayed in the Call Information area.

If no number was selected, the Number field will be blank. In this case either enter the desired number into the field, use the Dial Pad to enter the number, or select a number from the Speed Dial list. When completed, press the Dial button to place the call.

When the call is placed, the other data fields in the Call Information area will be filled in based on data in the CallAudit database.

If the entered telephone number does not exist in the database, one will automatically be created. If an area code was omitted, your local area code will be used and the Use Area Code option will not be selected.

Use the Off Hook button to place the MODEM in an off hook state. Use the Hang-up button to hang-up on the current outgoing call. Use the Dial button to dial the current number.

The Speed Dial list provides an easy way to place calls to common numbers. You can place a call to any number on the Speed Dial list by double clicking the number with the mouse. Use the Add to Speed Dial button to add the current number to the Speed Dial list. Speed Dial entries may be deleted by selecting a single entry and pressing the delete key.

The System Preferences allows you to configure the features that effect outgoing calls. If a called number is busy, CallAudit can continue to dial until the call goes through. See the System Preferences section for more information on these options.

### **Returning An Incoming Call**

Incoming calls can be returned directly from the Incoming Calls Display. Use the mouse to select a single incoming call and press the Dial Out button on the main window button bar. Incoming calls can also be returned by pressing the Callback button on the Incoming Call Details display.

### **Repeating An Outgoing Call**

An outgoing call can be repeated (re-dialed) directly from the Outgoing Calls display. Use the mouse to select a single outgoing call and press the Dial Out button on the main window button bar.

The settings in the Calls section of the System Preferences display control how outgoing calls are re-dialed in the case of a busy number.

Outgoing calls can also be returned by pressing the Callback button on the Outgoing Call Details display.

### **MODEM Dial Out Commands**

CallAudit uses standard Hayes MODEM commands for placing outgoing calls with the

MODEM. The default commands used are ATDTW for tone dialing and ATDPW for pulse dialing. If you wish to use different commands, edit the CALAUDIT.INI file in the Windows directory. The ToneDialString and PulseDialString parameters in the [ModemParms] section determine the strings to be used.

## Auto Dial Callback List

The Auto Dial Callback List provides a simple means to automate the dialing of a list of telephone numbers. An example of this display is shown below.

#	Number	Name	Status
1	(703) 935-2275	Mountain Systems Spt	Not called

Numbers may be added to the auto dial list from the Incoming and Outgoing Calls displays, the PhoneBook, and the Reports areas. Numbers are added by selecting call records from the displays and then pressing the **Auto Dial** button on the button bar. All the records from a report can be added by selecting the **Records to Auto Dial List** option from the **Actions** menu.

Numbers can be deleted from the list by selecting one or more numbers and pressing the Delete key or Backspace key on the keyboard.

The current status of each number record is shown in the last column. The status options are:

**Not Called** - Indicates this number has not yet been called

**Called - incomplete** : Indicates this number was called, but the call was incomplete

**Called - complete** : Indicates this number was called and completed

The **Name** field shows the name of the currently loaded auto dial list. The **Count** field shows the number of telephone numbers in the list. The name field can be changed with both the **Open** and **Save As** buttons.

The **Desc** field provides an area to enter a description of this auto dial list. The data entered here is saved along with the selected telephone numbers.

Use the **Open** button to open a previously stored auto dial list.

Use the **Save** button to save the current auto dial list. Any changes made to the current

list will automatically be saved when the auto dial list window closes.

Use the **Save As** button to save the current auto dial list with a different name.

Use the **Clear** button to delete all numbers from the current list.

Use the **Reset** button to reset all numbers to Not Called status.

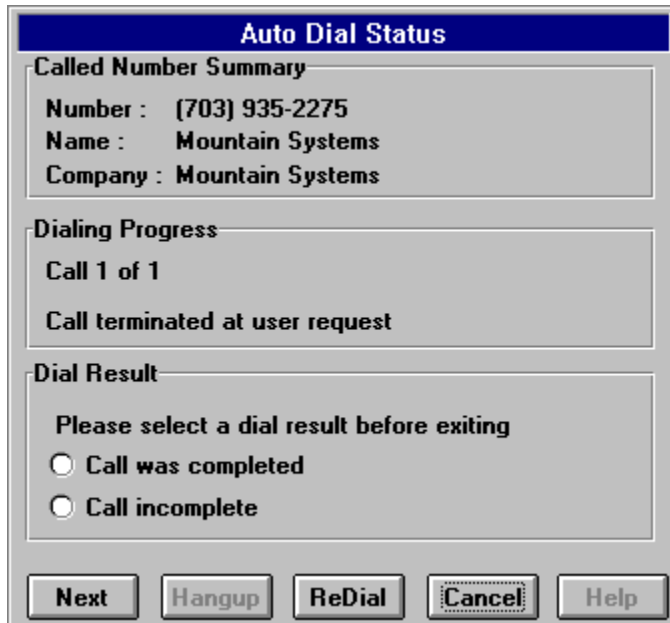
Use the **Dial** button to start the auto dial process for the current telephone number list. The dial out device to be used is the default device specified in the Call Defaults portion of System Preferences.

Each of the telephone numbers in the list will be called. A popup dialog will be displayed to track the call progress for each number as it is being called. See the Auto Dial Status area for more information.

The auto call process will start with the currently selected autodial record. If, for example, you select list item 5, then dialing will start with item 5 and continue to the end of the list. The dialing will then move to the top of the list and move back down to item 4, which would be the last number called.

## Auto Dial Status

The Auto Dial Status dialog shows the progress of the auto dial process. An example display is shown below. See the [Auto Dial Callback List](#) area for more information about auto dial options



The screenshot shows a dialog box titled "Auto Dial Status" with a blue header. It is divided into three sections: "Called Number Summary", "Dialing Progress", and "Dial Result".

- Called Number Summary:** Number : (703) 935-2275, Name : Mountain Systems, Company : Mountain Systems.
- Dialing Progress:** Call 1 of 1, Call terminated at user request.
- Dial Result:** Please select a dial result before exiting. Two radio buttons are present: "Call was completed" and "Call incomplete", both of which are currently unselected.

At the bottom of the dialog, there are five buttons: "Next", "Hangup", "ReDial", "Cancel", and "Help".

Use the **Hangup** button to cancel the current call.

Use the **ReDial** button to re-dial the current telephone number.

Use the **New** button to move to the next telephone number in the auto dial list.

Use the **Cancel** button to cancel the current auto dial process.

When the hangup button is pressed, multiple call status options will be displayed above. Select one of the options before proceeding to the next call.

**Call was completed** - Indicates that the call was completed

**Call incomplete** - Indicates that the call was not completed and requires further action.

## Importing Telephone Numbers

The CallAudit information on incoming calls is stored in a relational database keyed on telephone number. This includes name, company, address, and other information that is associated with the incoming callers telephone number.

The first time an incoming call is received from a new telephone number, a record is automatically inserted into the database. Default values (caller name as "Unknown", etc.) are used for all fields except the telephone number. If Caller ID name service is in effect, the Caller ID name will be used for the initial name field. The user can then edit this record, using the Database Details option, to enter the appropriate data.

Telephone numbers can be imported into CallAudit from external sources. This might include word processor or Personal Information Managers software, for example. If you already have telephone number information available this data can be imported into the CallAudit telephone number database using delimited text files. All imported data is based on double quoted ASCII strings as input.

Shown below is an example of the Import Telephone Numbers display.

The screenshot shows a dialog box titled "Import Phone Numbers". It is divided into two main sections. The left section is for configuration and includes: "Import Data Source" with fields for "File Name" (with an "Open" button), "Record Count", and a "Delimiter" dropdown menu set to "Tab character"; "Input File Data Options" with two unchecked checkboxes: "No dial prefix in input" and "No use area code in input"; and a "PhoneBook for imported numbers" dropdown menu set to "Standard PhoneBook". The right section is titled "Processed Records List" and contains a large empty rectangular area. Below this area is a "Total Records" field. At the bottom of the dialog are four buttons: "Import Records", "Delete Imported Records", "Close", and "Help".

Press the Open button to select the import source file.

Use the Delimiter option to select the type of delimiter used in the input file.

Use the **No dial prefix in input** and **No use area code in input** options if you import file includes telephone number and **does not** include the dial prefix and use area code fields. This is a common situation when importing telephone numbers from data sources where the dial prefix and use area code data is not stored separately.

Use the **Pad 7 digit numbers with local area code** option if your input contains telephone numbers with only seven digits. CallAudit stores all numbers as 10 digits, with the area code first. Selecting this option will automatically add the local area code to the front of any input number of only seven digits.

Press the Import Records button to import records from the currently selected file.

The Import Data Source area allows the user to select the desired import text file. A record count is automatically provided based on an initial scan of the input file.

The Added Phone Number List section provides a summary of the numbers added from the input text file. You can immediately delete any records added using import by pressing the Delete Imported Records button.

### **Delimited File Input**

The format of this text file should include one line for each telephone number record to be imported. The entries should include the following values in the order listed, **each enclosed in double quotes**.

- Telephone number
- Dial prefix - Note that this field is optional
- Use area code option (either 0 or 1) - Note that this field is optional
- Name
- Company
- Address line one
- Address line two
- City
- State
- Zip code
- Fax Number
- User field 1
- User field 2
- Comment

If any of the fields for a particular telephone number are missing in the import file, or otherwise incorrect, default values will be used. Default values are either blank filled or set to Unknown.

The file can be either comma delimited or tab delimited. A comma delimited file will have each field in the record separated by a single comma. A tab delimited file will have a single tab character that separates each field of the record.

The choice of comma or tab delimited is set by the list box in the Import Data Source area.

An example of a data line for a comma delimited import file is shown below.

```
"(540) 935-2275", "1", "0", "Mountain Systems"
```

In this case only four fields (number, dial prefix, use area code option, and name) are imported. Note that each field is further marked by double quotes.

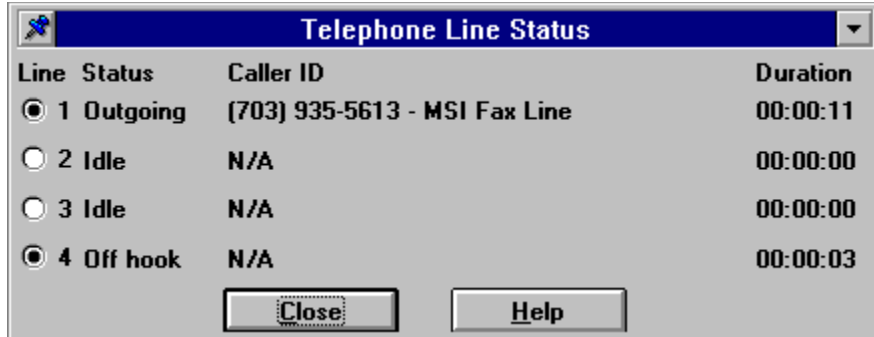
### **Record Creation**

A record is created for each correctly formatted unique telephone number record included in the input text file. Records will not be created for telephone numbers that already exist within CallAudit.

A summary of the telephone number records added is provided on the display.

## Telephone Line Status

The Telephone Line Status dialog is available only with the CallAudit MultiLine software product. This dialog shows the line status when CallAudit MultiLine is used with the Zeus 4 Line Caller ID serial device.



The **Line** column shows the on/off hook status. A darkened radio button indicates an off hook state.

The **Status** column provides more information about the state of the line. This includes on/off hook, ringing, and outgoing/incoming call status.

The **Caller ID** column shows the number and name of the party calling/being called. This field is only filled when an incoming or outgoing call is in progress.

The **Duration** column shows the call duration. This field is only filled when an incoming or outgoing call is in progress. Call duration for incoming calls is measured from off hook to on hook. Call duration for outgoing calls is measured from beginning of ringing to on hook.

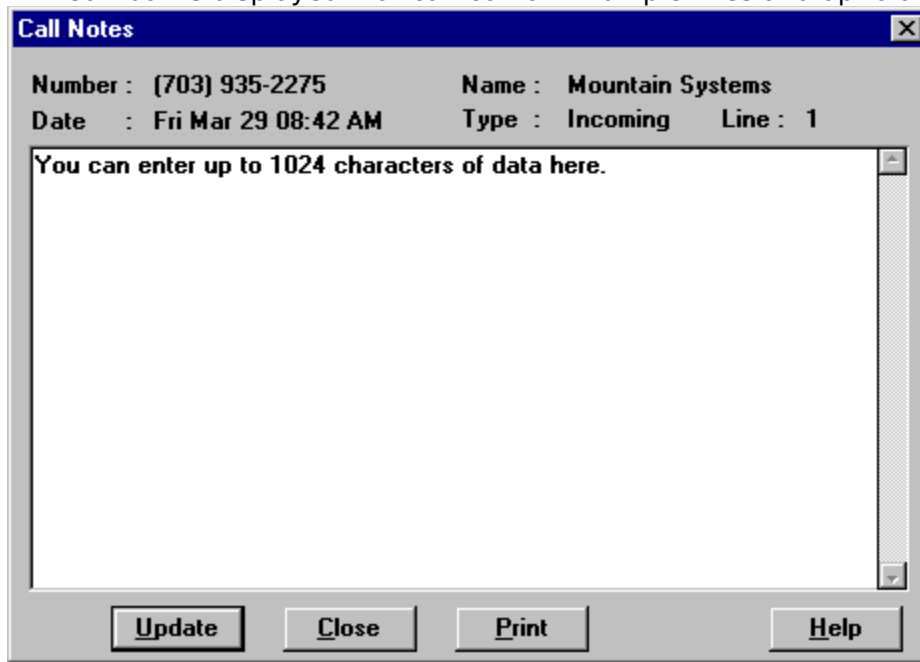
The initial position of the dialog is centered on the CallAudit main window. The dialog can be moved to another location and CallAudit will remember its new location each time it is re-opened.



## Call Notes

The **Call Notes** display provides a simple means to make notes about a particular telephone call. The note data is stored with the call history can be recalled at any time.

An edit box is displayed that can contain multiple lines and up to a total of 1024 characters.



The screenshot shows a window titled "Call Notes" with a close button (X) in the top right corner. The window contains the following information:

Number :	(703) 935-2275	Name :	Mountain Systems		
Date :	Fri Mar 29 08:42 AM	Type :	Incoming	Line :	1

Below the information is a large text area with a vertical scrollbar on the right. The text area contains the message: "You can enter up to 1024 characters of data here."

At the bottom of the window are four buttons: "Update", "Close", "Print", and "Help".

Press the **Update** button to save you changes.

Press the **Close** button to close the window.

## **DDE Client Status**

The DDE Client Status display shows the status of the Client connection to the CallAudit Routing Server.

The **Host Selection** button is used to specify the host computer on which the CallAudit Routing Server software is executing. This is usually only done once when the Client software is first loaded.

The **Connect** button will attempt a manual connection to the server.

The **Disconnect** button will disconnect from the server.

The **Clear List** button will clear the current status display list.

## **DDE Server Status**

The DDE Server Status display shows the status of the Server connections from CallAudit Clients.

The **Total Client Connections** field shows the total number of clients currently connected to the server.

The **Max Connections** field shows the maximum number of clients that can be connected to the server.

The **Disconnect** button will disconnect any current clients from the server.

The **Clear List** button will clear the current status display list.

## Call Routing Network Configuration

The CallAudit Call Routing Server sends incoming and outgoing call information to CallAudit Client workstations using Network Dynamic Data Exchange (NetDDE). Dynamic Data Exchange (DDE) is one of the few protocols supported by Microsoft for communications between two or more Windows programs. NetDDE is the network version of DDE where Windows programs on different computers can communicate.

To use The CallAudit Client/Server software you need two more networked PCs connected with network support for NetDDE. NetDDE support is built into Windows for Workgroups, Windows 95, and Windows NT. Others network service provides may also provide support for the NetDDE protocol.

If your current Network software does not support NetDDE, you have a number of choices:

- Contact your network vendor to see if NetDDE support can be added
- Change to a network software package that supports NetDDE
- Install one of the standard Windows packages that include built-in support

The last option is usually the lowest cost route, and represents the least change to your system.

If you use Novell network software and have Windows 3.1 PCs, then no built-in support for NetDDE will exist (Novell does not support NetDDE at this time). By upgrading your Windows 3.1 PCs to Windows for Workgroups (WFWG 3.11), then the NetDDE support within WFWG can co-exist with your Novell installation at the same time. The same result would also be obtained by upgrading to Windows 95 or Windows NT.

### Windows NT

Using the CallAudit Server software on Windows NT requires a slightly different setup. NetDDE support is provided by a combination of software components on the PC. The main Windows applications that handles the NetDDE network communications is NETDDE.EXE. Other components include the NDDEAPI.DLL. The Windows NT NETDDE.EXE program is a 32 bit application for handling NetDDE calls for other 32 bit applications in a trusted security configuration. The Windows NT NETDDE.EXE file is usually located in the Windows NT system directory, which is named SYSTEM32 on many systems. If the Windows NT version of NETDDE.EXE is running, the CallAudit Server will not be able to communicate with other client locations.

The current CallAudit software products are 16 bit applications. When either the Server or Client software starts, the software automatically starts the NETDDE.EXE program. The NETDDE.EXE started should not be the Windows NT version, but instead a standard Windows 3.11 or Windows 95 version. The 3.11 or Windows 95 versions are usually stored in the WINDOWS directory.

Windows NT offers a number of Services options where system components can be automatically started at boot up. The 2 NETDDE components should NOT BE SET for

automatic startup. If the Windows NT components of NETDDE.EXE are started automatically, the CallAudit Server will not be able to start the 16 bit version of this software.

## TAPI Hardware Configuration

The Telephony Application Programming Interface (TAPI) was developed by Microsoft and others to simplify the interface between Windows applications and telephone equipment. Prior to TAPI, most telephony applications had a separate software interface for each separate supported piece of hardware. For example, supporting voice MODEMs from two manufacturers would require two separate software interfaces. This greatly limited software developers as there were more hardware differences than available time and \$ to modify their applications software. TAPI was designed to solve this problem as well as many more.

Using TAPI on your PC requires at least four things. The first is a piece of telephony hardware (MODEMs, serial devices, actual telephones, complex telephone switches, etc.) that supports TAPI. The second is a Windows application designed to take advantage of TAPI. The third are the Microsoft software components (TAPI.DLL and a few others) needed to support TAPI. The fourth is a software component called the Telephony Service Provider Interface (TSPI). If any of these pieces are missing, TAPI cannot be used. Each of these components may in fact include multiple software modules.

The Windows 95 operating system includes an option in Control Panel to configure TAPI. Windows 95 ships with this option disabled. You can enable the Telephony applet in Control Panel by doing the following:

1. Use Explorer to move to the Windows System directory.
2. Rename the file TELEPHON.CP\$ to TELEPHON.CPL
3. Start Control Panel
4. Double click on the Telephony applet.
5. Configure TAPI as required

The applications software performs the tasks you request by using the TAPI software interface to make requests to the Microsoft TAPI.DLL software. The Microsoft components pass those requests on to the hardware specific TSPI modules. The TSPI software, in turn, works with the actual physical hardware to perform the operations. Examples of this process would be tracking incoming telephone calls or placing outbound calls.

Using TAPI hardware and software has many advantages. One of the first is that software configuration is mostly automatic. TAPI applications will query the hardware to determine the features and options that are supported. It no longer depends on you to determine these settings and enter them. A second advantage is that most TAPI applications can share the TAPI hardware with other TAPI compliant software. This occurs because it is built in the Microsoft TAPI software components. Where this feature can cause some problems is that most TAPI hardware cannot be shared with non-TAPI applications. If a standard 16-bit communications program is using your TAPI MODEM, then no TAPI application will be able to access the hardware at the same time.

A small percentage of the hardware on the current market supports TAPI, but a large percentage of new equipment will support it. The TAPI standard deals with many many features that can be supported by TAPI hardware. Virtually every piece of TAPI hardware supports a different subset of these possible features. Two separate MODEMs may support TAPI, but only one might include support for Caller ID. Just because the hardware supports TAPI does not mean it will do all the things you want. The TAPI support for voice capable

MODEMs varies even more widely.

Most TAPI compliant hardware components come with their own TSPI software interface. A good example is the AT&T 8130 Computer Telephone. The 8130 supports TAPI and comes with it's own TSPI. It can support the tracking of both inbound and outbound calls, call duration, and placing outbound calls through the telephone.

Windows 95 can support multiple TSPI packages installed at the same time. Windows 95 comes standard with UniModem, a very simple TSPI for the most basic MODEM functions. **The original TSPI included with Windows 95 DOES NOT support Caller ID.**

Microsoft recently announced the availability of UniModemV for Windows 95, a highly improved general purpose TSPI for MODEMs that includes support for both Caller ID and voice functions. UniModemV is available today as a download software package from different Microsoft sources. To use UniModemV with your TAPI hardware requires at least the following:

- Windows 95
- UniModemV installed
- .inf file installed specific to your TAPI hardware
- TAPI hardware installed in Telephony component within Control Panel

**If you intend to use CallAudit with TAPI devices and detect Caller ID, you must obtain the new UniModemV from Microsoft. It is available from their CompuServe library, their Internet Web page, directly from Microsoft, or from the Mountain Systems BBS.**

When using TAPI and UniModemV for Caller ID, incoming Caller ID data may be slower to appear. For normal communications interfaces with MODEMs, the Caller ID data arrives shortly after the first ring. It is almost always displayed by CallAudit prior to the second ring. When using UniModemV for Caller ID, the data is sometimes not sent to CallAudit until just after the second ring. This appears to be a characteristic of UniModemV and is not directly related to CallAudit. You may want to consider this fact in how you set your voice mail and/or fax systems for automatic answering. Setting for 3 rings or more will decrease the chance of missing the Caller ID data.

CallAudit Version 3.0 for Windows 95 includes support for 32 bit TAPI. CallAudit Version 3.0 for Windows 3.X includes support for 16 bit TAPI.

CallAudit can work with TAPI MODEMs, telephones, and other similar telephone devices to track incoming and outgoing calls, place outgoing calls, and other program features. You can select the TAPI mode for CallAudit in the MODEMs section of the System Preferences area. Choose the TAPI device type to use TAPI. See the TAPI Device Selection area for more information about selecting a TAPI device for use with CallAudit. CallAudit 3.0 includes no TSPI components as these are almost always hardware specific and supplied by the hardware manufacturer.

Choosing the TAPI device option will generate a separate hardware list for your PC. This list will show the current hardware installed on your PC that supports TAPI. Doubling

clicking on any of these list entries will show additional TAPI properties about this device. CallAudit can support up to two devices at the same time and either or both can be TAPI based. Thus if you have two TAPI MODEMs, then each could be used to audit a separate telephone line.

All TAPI compliant hardware in your PC should show up in this list. If your hardware is TAPI compliant and does not show, check the following areas:

- Have you installed the hardware specific TSPI component? This is usually done through the control panel using the Telephony applet.
- Have you installed the hardware related software components? In Windows 95 MODEMs have to be installed in the MODEMs section for most TAPI software to take advantage of their features.
- Can any other TAPI compliant software packages see this hardware?

As stated above, the actual features supported by each piece of TAPI compliant hardware is different. For example some TAPI hardware will support on/off hook detection ( which is required to accurately track the duration of inbound or outbound calls), while other hardware will not. Some can monitor outbound calls made from extension telephones, which others cannot. The features supported is highly specific to the hardware in use. There is currently very little commonality in which features are supported.

When you select a TAPI device for use, CallAudit will query the TSPI software to determine which features are supported and which are not. Different displays and options within CallAudit will be disabled if your hardware does not support the feature. For example if your TAPI hardware does not support outbound dialing, then selecting the DialOut window in CallAudit will generate an error indicating your hardware does not support dial out.

**Note: TAPI support is an option only available in CallAudit Version 3.0 or later.**

**TAPI options, using Caller ID, are generally only available when used with Windows 95. Windows 3.X does not support the 32 bit TAPI options used by the CallAudit 3.0 32 bit application.**

**Microsoft has added TAPI support to Windows NT 4.0, but at this time 32 bit TAPI is not supported. The current Beta release of NT 4.0 does include TAPI drivers.**



## TAPI Device Selection

This display is used to select a TAPI hardware device for use with CallAudit. The list shows all the TAPI devices installed in your PC. The item at the top shows the current device selected, if any. See the [TAPI Hardware Configuration](#) section for more information about TAPI and the use of TAPI devices.

**Click** on a TAPI device to select that device for use.

**Double click** on a TAPI device to see the TAPI properties associated with that device.

The key TAPI features for CallAudit are shown for each device selected. Features not supported by the selected TAPI device will be disabled.

Press the **OK** button to accept the currently selected TAPI device.

Press the **Cancel** button to cancel the current selection.

**Note: TAPI support is an option only available in CallAudit Version 3.0 or later.**

**TAPI options are only available when used with Windows 95. Windows 3.X does not support the 32 bit TAPI options used by CallAudit 3.0.**

**Microsoft plans to add TAPI support to Windows NT, but at this time 32 bit TAPI is not supported.**

## Telephone Number Paging

CallAudit can automatically issue pages to your paging system for each incoming and/or outgoing call. CallAudit can work with both DTMF numeric paging systems and alpha-numeric paging systems. See the [General Paging Information](#) area for more information about paging.

Pages can be generated based on telephone number or for all telephone numbers. This display is used to establish paging by telephone number.

The screenshot shows a software window titled "Telephone Number Database Details" with a blue title bar. It has four tabs: "Number Data", "Options", "Paging" (which is selected), and "Call Costing".

- Caller Summary:** Number : (540) 935-5613, Name : Mountain Systems Fax, Company : Mountain Systems, Inc.
- Page Options:**  Enable paging (with a "Configure" button), and a list titled "Assigned page id" containing "New page".
- Page Message Content:**  Caller Number,  Caller Name,  Use Message.
- Message text:** A large empty text area.
- Buttons:** "Update", "Close", "Help", and "Test" are located on the right side of the window.

### Page Options

Select the **Enable paging** option to enable paging for this telephone number.

Select the page to be used from the **Assigned page Id** list.

Edit the details for the selected page by pressing either the **Configure** button or double clicking on the page item.

### Page Message Content

This area determines the message to be issued to your pager for calls to/from this telephone number. The message can be a combination of the telephone number, the name of the caller, and a separate test component. Messages to DTMF numeric only paging systems should only include numeric data.

Select the **Caller Number** field to have the caller telephone number used in the page message.

Select the **Caller Name** field to have the caller name used in the page message.

Select the **Use Message** field to have the entered text used in the page message. Enter the desired text in the text area below. The message text can consist of standard text and/or variables that reference elements of the call record (caller name, number, line, duration, etc). See the [Page Information/Update](#) section for further details on supported variables.

### **Other Paging Options**

See the [Page Information / Update](#) area for details on editing the parameters associated with a single page.

See the [Page Status](#) area for information on current pending pages.

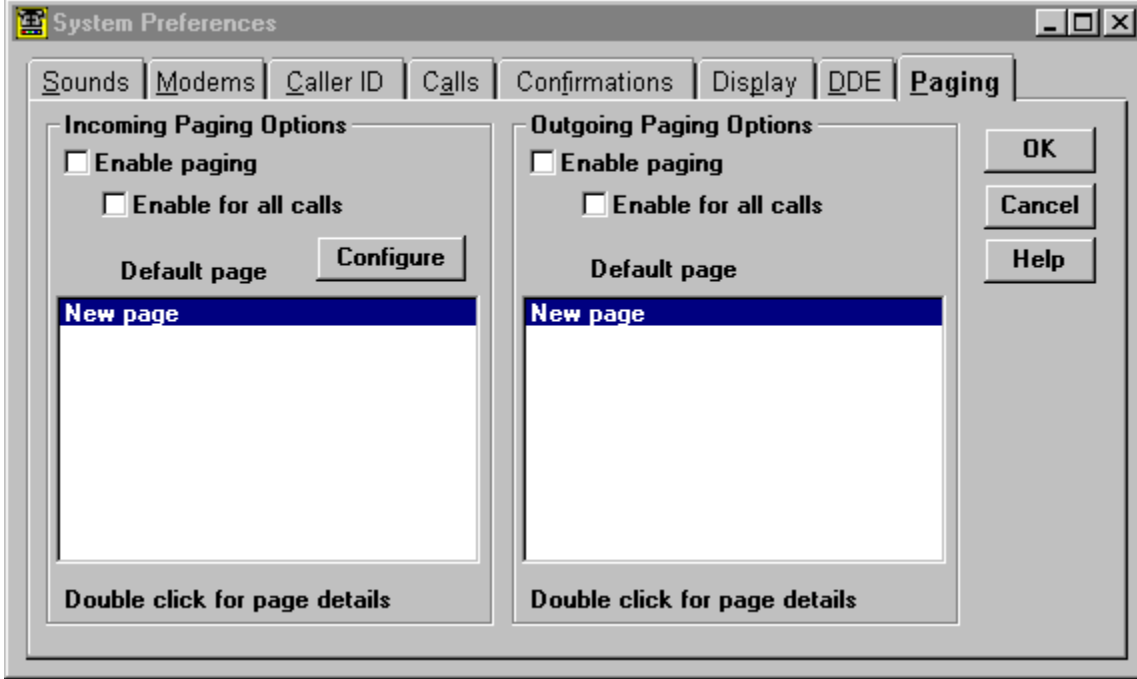
See the [Paging Defaults](#) section of [System Preferences](#) for help on setting up paging defaults.

See the [General Paging Information](#) area for more information about overall paging.

**Note: Paging is an option only available in CallAudit Version 3.0 or later.**

# Paging Defaults

CallAudit can automatically issue pages to your paging system for each incoming and/or outgoing call. Pages can be generated based on telephone number or for all telephone numbers.



## Incoming Paging Options

Select the **Enable Paging** option to enable paging for incoming calls. This option must be selected for any pages to be issued for incoming calls.

*Note: You can quickly enable or disable paging by clicking on the CallAudit frame window with the right mouse.*

*The paging status is show in a small window on the right side of the status bar at the bottom of the CallAudit main window.*

Select the **Enable for all calls** option to enable paging for every incoming call.

Select the **Filter out special numbers** option to filter out special numbers such as No-CallerID, Private, and Out of Area from generating automatic pages.

The current pages defined within CallAudit are shown in the list box area. The current default page for incoming calls is highlighted.

Select the desired default page by selecting a single page with a **single mouse click**.

Press the **Configure** button to configure the currently selected page.

You may also configure a single page with a **double mouse click**.

## Outgoing Paging Options

Select the **Enable Paging** option to enable paging for outgoing This option must be selected for any pages to be issued for outgoing calls.

Select the **Enable for all calls** option to enable paging for every outgoing call.

The current pages defined within CallAudit are shown in the list box area. The current default page for outgoing calls is highlighted.

Select the desired default page by selecting a single page with a **single mouse click**.

You may configure a single page with a **double mouse click**.

### **Page Update**

Press the **Update** button to update the parameters for the page parameters for the current telephone number.

Press the **Test** button to generate a test page for the current page and telephone number.

### **Other Paging Options**

See the [Telephone Number Paging](#) area for details on setting up paging for specific telephone numbers.

See the [Page Information / Update](#) area for details on editing the parameters associated with a single page.

See the [Page Status](#) area for information on current pending pages.

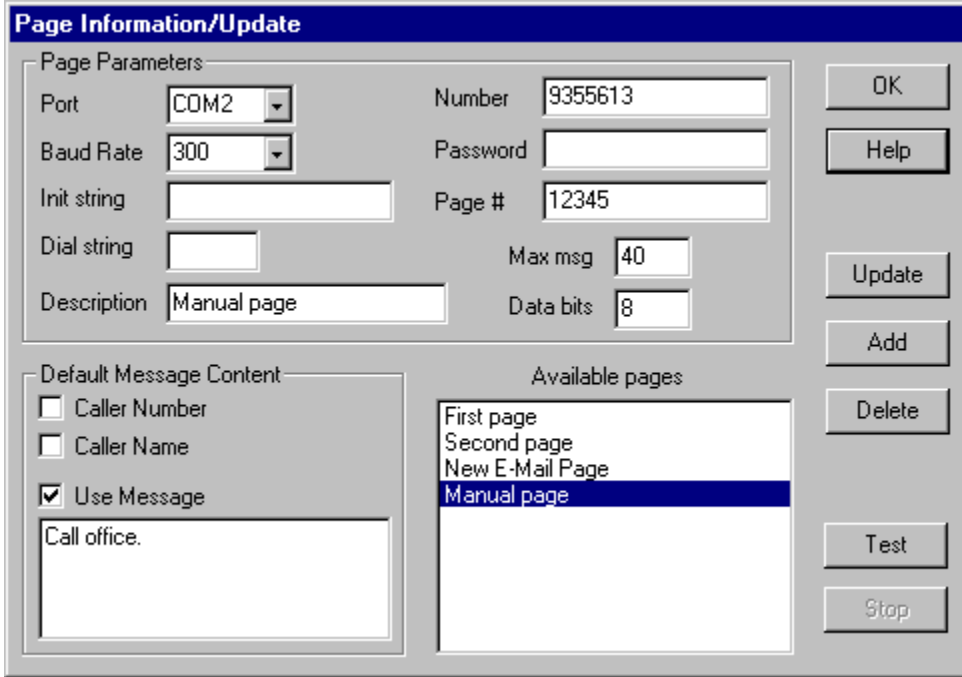
See the [General Paging Information](#) area for more information about overall paging process.

**Note: Paging is an option only available in CallAudit Version 3.0 or later.**

# Page Information / Update

CallAudit can automatically issue pages to your paging system for each incoming and/or outgoing call. Manual pages can also be sent.

This display is used to edit the parameters associated with pages. CallAudit supports both numeric and alphanumeric paging systems.



The **Available Pages** list shows the current pages defined for CallAudit.

Select the desired page from the available pages list to review the page parameters. The key information for most paging systems is the **Number**, **Page #**, and **Message** fields.

## Page Parameters

Select the type of paging service using the **Paging service type** pull down menu. The only two options are Numeric (beeper) and Alphanumeric (TAP). The paging service selection will enable only the parameters appropriate for that service. See [the General Paging Information](#) section for more information about different types of paging services.

Select the communications **Port** for the page. All communications will use this port for paging with your MODEM.

**Note:** Paging requires exclusive access to the port during page. The paging components uses standard Windows communications and not TAPI. If this port is in use by other software, then pages cannot be sent. CallAudit will automatically share the port with paging software.

Select the **Baud** rate to be used. The default of 300 baud is sufficient for interfacing with most paging systems. **Do not use a different value unless you know** your

paging system requires it.

Select the **Init String** to be used for your MODEM. The CallAudit paging software already knows how to interface with most MODEMs. Enter a string here **ONLY** if you experience problems with your MODEM.

**Note: If you experience problems with Alpha Numeric paging systems, try using the following initialization string:**

**ATN0%CO~**

This string turns off both speed negotiation and data compression, both of which will cause problems for some paging systems. For many paging systems you want to connect only at the set speed and you want NO DATA COMPRESSION. This string will set these options for most MODEMs.

Select the **Dial String** to be used for your MODEM. The CallAudit software already knows how to interface with most MODEMs. Enter a string here **ONLY** if you experience problems with dialing on your MODEM.

**Note: If you experience problems with paging trying to dial out while your voice mail system is still taking a message, use the following dial string:**

**ATDTW**

This will make the MODEM wait for a dial tone before trying to dial out. If your voice mail system is still on the line taking a message, then no dial tone will result and the page process will stop and try again later.

Enter your **Description** for this page. This can be any text string up to 32 characters.

Enter the telephone **Number** for your paging system in the **Number** field. This is the telephone number that will be dialed to reach the paging system.

Enter any **Password** that is required for your paging system in the **Password** field. Most paging systems do not require a password.

Enter the access code for your page in the **Page #** field. This is identification for your individual pager unit.

Enter the maximum number of characters per paging message in the **Message** field. This value is the maximum number of characters that can be passed as a message to your pager. This can be any combination of numbers and letters. Note that not all paging systems support both numbers and letters.

Enter the number of data bits for your paging system in the **Data bits** field. The default value of 8 is suitable for most paging systems.

**Note: If you have problems with Alpha Numeric paging, try setting this value to 7 data bits. Some paging systems will only work with a seven data bit setting.**

Enter the termination string in the **Term string** field. This field is used only for numeric paging and usually requires no data entry. Only enter data here if you have problems disconnecting from your numeric paging service.

Enter the delay in seconds in the **Delay (sec)** field. This field is used only for numeric paging and is the delay time between dialing the paging service and entering the paging message. Be sure to enter a sufficient time for your MODEM to dial the paging service, the paging service to answer, and issue any bong tones.

### **Default Message Content**

This area determines the message to be issued to your pager. The message can be a combination of the telephone number, the name of the caller, and a separate test

component.

Select the **Caller Number** field to have the caller telephone number used in the page message.

Select the **Caller Name** field to have the caller name used in the page message.

Select the **Use Message** field to have the entered text used in the page message.

Enter the desired text in the text area below. The message text can consist of standard text and/or variables that reference elements of the call record (caller name, number, line, duration, etc).

The following variables are available:

\$name	Provides the name for the incoming call.
\$namechar	The name with comma chars removed
\$number	Provides the telephone number for the incoming call. The format includes only the digits with no spaces or other formatting characters included.
\$number-a	Provides the telephone number for the incoming call. The format includes the digits in the format XXX-XXX-XXXX, which is used by ACT! .
\$number-space	Provides the telephone number for the incoming call.  The format includes the digits in the format XXX XXX XXXX, which is used by some programs and users.
\$number-goldmine	Provides the telephone number for the incoming call. The format includes the digits in the format (XXX)XXX-XXXX, which is used by GoldMine.
\$number-monologue	The telephone number with one space between each digit. This allows monologue to pronounce the number as separate digits.
\$number-7	Last seven digits of a 10 digit telephone number
\$areacode	Three digit area code from a 10 digit number
\$line	The line number for this call
\$userfield1	Value for the User 1 data field.
\$userfield2	Value for the User 2 data field.
\$dtmf	Value for the PostCallDtmf field
\$date	Text format for call date/time
\$time24	Text format for 24 hour time (eg 1830)
\$duration	Text format for call duration in seconds
\$company	Text value for the company field
\$address	Text value for the address field
\$address2	Text value for the address2 field
\$city	Text value for the city field
\$state	Text value for the state field
\$zip	Text value for the zip field



For example to display the name, number, and line number in a page message for an incoming call, the following message text would be used:

Call from \$name at \$number on line \$line

This message text would product a paging message of the form:

Call from Mountain Systems at 5409352275 on line 1

### **Page Creation/Update**

Press the **Update** button to update the parameters for the selected page.

Press the **Add** button to add the page to the CallAudit database.

Press the **Delete** button to delete the page from the CallAudit database.

Press the **Test** button to generate a test page for the current page.

Press the **Stop** button to terminal the test page.

### **Other Paging Options**

See the [Telephone Number Paging](#) area for details on setting up paging for specific telephone numbers.

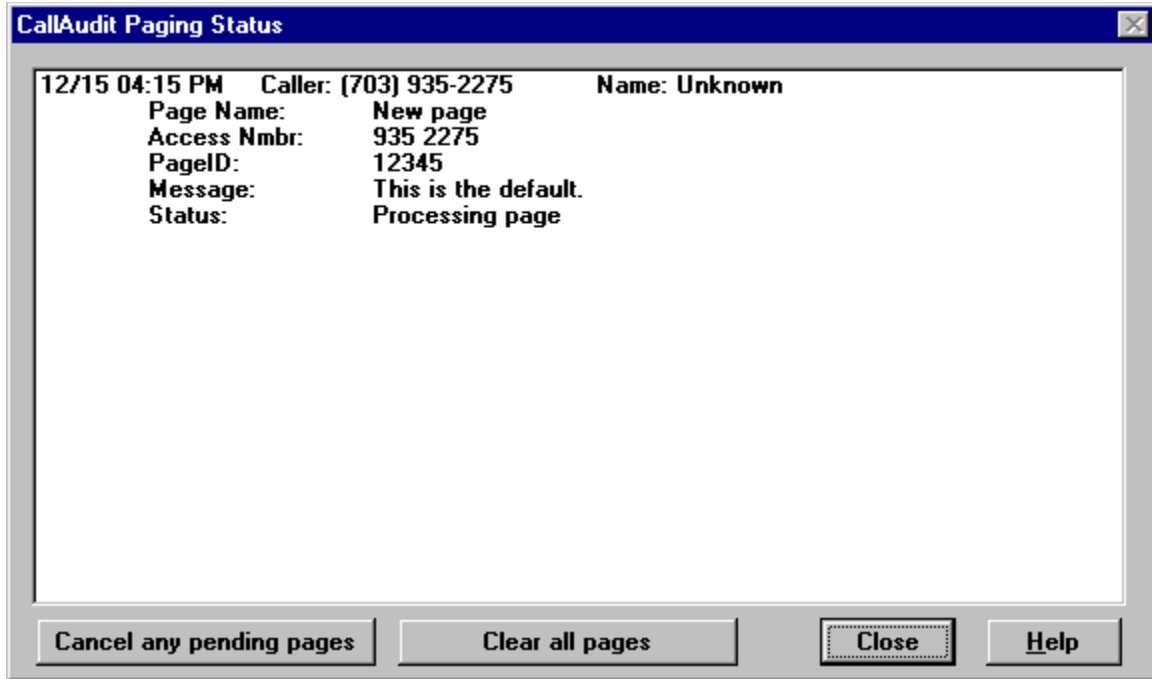
See the [Page Status](#) area for information on current pending pages.

See the [Paging Defaults](#) section of [System Preferences](#) for help on setting up paging defaults.

See the [General Paging Information](#) area for more information about the overall paging process.

**Note: Paging is an option only available in CallAudit Version 3.0 or later.**

# Page Status



CallAudit can automatically issue pages to your paging system for each incoming and/or outgoing call. This display shows the current status of pending and/or completed pages.

Press the **Cancel any pending pages** button to cancel any current pages that have not been completed.

Press the **Clear all pages** button to clear any pages from the system. Using the option will **erase the history** of all current pages.

## Other Paging Options

See the [Telephone Number Paging](#) area for details on setting up paging for specific telephone numbers.

See the [Page Information / Update](#) area for details on editing the parameters associated with a single page.

See the [Paging Defaults](#) section of [System Preferences](#) for help on setting up paging defaults.

See the [General Paging Information](#) area for more information about the overall paging process.

**Note:** Paging is an option only available in CallAudit Version 3.0 or later.

## Sending a Manual Page

Use this display to send a manual page. The currently defined pages are shown in the list box. To send a manual page do the following:

- Select a page with the mouse
- Edit the message text as desired
- Press the **Send** button

This will queue the page for sending. As soon as the line is available the page will go out.

**Note: The message text for the selected page is permanently updated with the message text data entered.**

It is suggested that a separate page be created for manual paging to avoid overwriting message text data for other automatic pages. See the [Page Information](#) area for more information about configuring pages.

You can add or modify page data by double clicking on any of the pages in the page list.

### Other Paging Options

See the [Telephone Number Paging](#) area for details on setting up paging for specific telephone numbers.

See the [Page Information / Update](#) area for details on editing the parameters associated with a single page.

See the [Paging Defaults](#) section of [System Preferences](#) for help on setting up paging defaults.

See the [General Paging Information](#) area for more information about the overall paging process.

## General Paging Information

CallAudit can work with both numeric and alphanumeric paging systems. Numeric systems have a simple interface that can be accessed via a standard telephone or from a computer. Most alphanumeric paging systems also support a protocol called TAP that is a computer to computer interface. This options provides the most error free method of paging. If your paging service supports TAP, use this option.

### Numeric Paging

Sending a page to a numeric paging service involves a few simple steps:

- 1) Dial the paging service telephone number
- 1) Wait a fixed number of seconds
- 2) Enter the message as a series of touch tone digits
- 3) Hang up

Note that with this type of paging, little error detection is possible. The paging number is dialed, the software waits a fixed time, and then enters the message and hangs up.

### Alpha Numeric Paging

Sending a page to a alphanumeric paging service involves a number of steps that includes a variety of error correction:

- 1) Dial the paging service telephone number
- 2) Process the computer to computer TAP protocol
- 3) Enter the alphanumeric message
- 4) Hang up

You will need to know the following about the paging company of the pager.

1. Access Number. You will need to know the paging terminals alphanumeric paging access telephone number. This is the phone number of the modem at the paging company that will receive the message using the TAP protocol. This number is the same for everybody that has a pager from that company. Many carriers will offer 800 numbers - especially the nationwide firms like SkyPage or Mobilcomm.
2. The baud rate. You need to know the paging company's modem baud rate associated with the access number. Most access modems still receive alphanumeric messages at 300 baud. Many have "upgraded" to 2400 baud. It doesn't really matter that much what rate they have - pager messages tend to be relatively short so the speed of transfer is not really that important.
3. Characters per message block. Most paging carriers limit how many characters can be sent in one message. A lot of carriers limit the message size to 80 characters. Many others have expanded their service to 230 characters per message. The size of message really becomes a factor of the carrier. You will need to find out this information or learn this through trial and error.

4. Password? Does your paging carrier require a password. Most US companies DO NOT. This is the standard way of doing it

1. You will also need to know what port your modem is connected to. You may need to know what kind of modem is attached and perhaps custom configure it by passing a modem initialization string. Generally the standard initialization string is sufficient.

### **Other Paging Options**

See the Telephone Number Paging area for details on setting up paging for specific telephone numbers.

See the Page Information / Update area for details on editing the parameters associated with a single page.

See the Page Status area for information on current pending pages.

See the Paging Defaults section of System Preferences for help on setting up paging defaults.

**Note: Paging is an option only available in CallAudit Version 3.0 or later.**

## Paging Enable - Disable Time Options

Paging can be automatically enabled or disabled based on the time of the day. The most common situation is where the user wants pages to begin at some point in the morning and end at some point in the evening. The **Paging Enable - Disable Times** dialog is used to select these options.

Press the **Page only in input time range** toggle button to enable the automatic paging option.

Enter the start time in the **Paging starts after** field. The time should be entered in the format of hh.mm AM/PM. For example to start paging at 8:30 in the morning, the value would be entered as 08:30 AM.

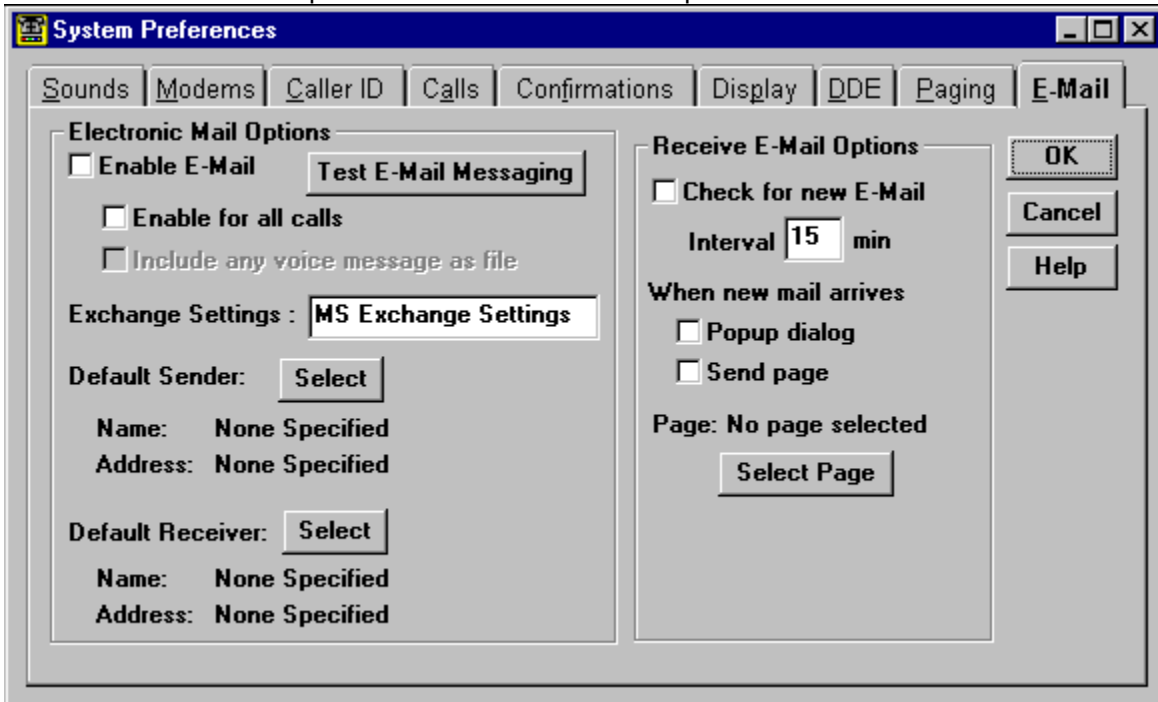
Enter the stop time in the **Paging stops after** field. The time should be entered in the format of hh.mm AM/PM. For example to stop paging at 5:30 in the afternoon, the value would be entered as 05:30 PM.

## E-Mail Defaults

CallAudit includes a variety of Electronic Mail (E-Mail) capabilities. These include:

- Send E-Mail message for each incoming call
- Send E-Mail message for incoming calls from selected numbers
- Send E-Mail message for outgoing calls from selected numbers
- Send user defined E-Mail message

CallAudit can automatically send E-Mail for each incoming and/or outgoing call. E-Mail can be sent based on telephone number or for all telephone numbers.



### Incoming E-Mail Options

Select the **Enable E-Mail** option to enable E-Mail for incoming calls. This option must be selected for any E-Mail to be sent automatically for incoming calls.

See the [Telephone Number Options](#) section to enable E-Mail for a specific number.

Select the **Enable for all calls** option to enable E-Mail for every incoming call.

Enter your Microsoft Exchange Settings in the **Exchange Settings** edit window.

Use the **Select** button to select the default sender for all automatic E-Mail messages.

You select these entries from the Microsoft Exchange Address Book.

Use the **Select** button to select the default received for all automatic E-Mail messages.

You select these entries from the Microsoft Exchange Address Book.

### Received E-Mail Options

Use this option to have CallAudit alert you when new electronic mail arrives in your inbox.

Select the **Check for new E-Mail** box to have CallAudit automatically check your inbox on a periodic basis.

Using this option assumes some facts about your electronic mail connection:

You have a permanent connection to E-Mail where your new messages automatically appear in your inbox when they are received. This is usually only the case for network installations where a permanent Internet connection is always in force.

Or you use a mail system that automatically checks for new incoming messages on a periodic basis.

The Microsoft Exchange package bundled with Windows 95 can do this if the Windows 95 Plus is installed. Microsoft Plus has a variety of Internet tools, which includes Internet Mail support.

You can set Exchange up to automatically dial your E-Mail connection on a periodic basis. Any new mail will be placed in your inbox. CallAudit can then detect this new mail and either popup up a dialog or send you a page based on the above selections.

To set up this option with Microsoft Exchange do the following:

Select the **Services** choice from the **Tools** menu.

Select **Properties** for **Internet Mail**.

Select the Connection tab.

Turn off the **Work off-line** option in the **Transferring Internet Mail** area.

Press the **Schedule** button to select you interval for automatic mail check.

Select the **Options** choice from the **Tools** menu.

Select the **Delivery** tab.

Be sure there is a valid value other than None in the first field for the location to which new mail is delivered.

Consult the Microsoft Exchange help files for further information. If you have problems setting up this feature, contact your Internet mail service provider for further details on dial-up settings necessary for your mail connection.

Enter the **Interval** in minutes that CallAudit will check your inbox.

Select the **Popup Dialog** option to have CallAudit alert you with a simple dialog box.

Select the **Send page** option to have CallAudit send you a page when new mail arrives.

Use the **Select Page** button to select the page to be used when alerting for new E-Mail.

**Note: E-Mail is an option only available in CallAudit Version 3.0 or later. E-Mail options are only available when using Windows 95 or Windows NT.**



## Tip of the Day

The Tip of the Day option provides hints and comments about CallAudit. The Tip Of the Day option can be set to automatically start each time the program starts, or called up at user request.

You can use the **View** menu to display the Tip of the Day option at any time.

Press the **Next Tip** button to see the next tip.

Press the **Previous Tip** button to see the previous tip

Select the **Show tips at startup** option to see the Tip of the Day each time the program starts. You can also set this option in the Display section of System Preferences.

## Telephone Number Associated Pictures

Each telephone number can have an associated picture. Pictures are stored in the database as a bitmap.

The maximum size for each bitmap is 250 pixels wide and 200 pixel tall. If the selected bitmap is larger than this size, only the top left portion will be used.

The pictures can be recalled using the right mouse options in the call logs or automatically for incoming and/or outgoing calls. See the Calls portion of System Preferences to set the automatic options for picture display.

Press the **Open** button to select an existing bitmap for this number.

Press the **Save** button to save the currently selected bitmap for this number.

Press the **Delete** button to delete the bitmap for this number.

