

CallCenter Quick Start Guide

Please take the time to read the installation section of the QuickStart Guide carefully. Failure to complete the installation process properly may result in failure of CallCenter to operate.

Introduction

V³, Inc. would like to extend its appreciation for your consideration of CallCenter as the communications solution for your needs. CallCenter is the first true 32-bit, multi-session, multi-tasking Voice/Fax/Data Communications software product to be released into the market. CallCenter is specifically designed to take advantage of the 32-bit features available under Windows 95 and Windows NT4.0. We have supplied this guide to ease the installation and first time use of our product. More complete documentation is available in the on-line help files, which are copied to your hard drive during installation.

Installation

During the installation process it is important that you complete all fields in the dialogs where requested. This information is required by CallCenter at run-time to dial phone numbers properly and to perform other specialized functions.

Start Windows NT, Windows 95 or 98 and insert CD-ROM into your CD-ROM drive. From the Windows Program Manager, select Run... from the File menu. Under Windows 95, click the Start button, then Run...

Type D:\SETUP if you are installing from drive D, or substitute D: with another drive letter if installing from another drive.

It may take several moments for the installer to prepare for the installation process, so please be patient. When the Welcome screen appears, the installer has properly loaded and is ready to continue. Follow the instructions on each screen filling in the appropriate information until the installation process is complete. Pay special attention to the following two screens:

International Dialing Information

The "International Access Number" field refers to the number used to dial outside your country of origin. This number may be the number required by your phone company to place an international call. The field "Your Country" will be, in most cases, automatically detected and initialized along with the field "Country Code". Please verify that these two fields contain the correct information based upon your current location.

Local and Long Distance Dialing Information

In this dialog the field "Area Code", in some countries, refers to a city code. In the United States this field refers to a much wider area. "Long Distance Access Number" refers to the

number required to make a non-local call. This number may contain the number of a long distance discount provider. The remaining two fields apply to obtaining outside lines for long distance and local calls from within a company, organization, PBX system, etc.. These fields may be left blank if there are no special requirements for obtaining an outside line from your location.

Modem Detection

In the final stage of installation the setup program will attempt to automatically identify the COM port your modem is on and the specific make and model of your modem. Make sure your modem is plugged in and turned on before beginning the modem detection process. In the unusual case where your modem model is not successfully detected, you must manually select your modem model. Check your modem manual or contact your modem manufacturer if you are not sure of the make and model of your modem.

Once CallCenter is successfully installed, you may want to read the sections below to familiarize yourself with CallCenter or CallCenter Pro.

Getting Started

Once CallCenter has been successfully installed, you will have several new icons available. Besides the readme file, which we suggest you read to obtain information on any changes to the product since the production of this guide, you will have one icon which you can use to start CallCenter Shareware version and three icons for CallCenter Pro.

CallCenter (Available in shareware and Pro version)

The CallCenter gives you easy access to a simple desktop telephone user interface. Here you can make use of the CallCenters telephone dialer, speakerphone, view received faxes, listen to voice messages, record out-going voicemail prompts, access phonebooks, system logs and make system configurations. Also you have additional control by making use of a right-mouse click just above the number two key-pad above the dialer. All novice features are easily accessible from within the CallCenter and it is highly recommended that if you are a novice user, you should start here until you have learned how to make use of all the features and functionality of the CallCenter Product.

COMponent WorkSpace (Available only in the CallCenter Pro version)

The COMponent WorkSpace gives you access to all CallCenter Pro software Modules. You should think of the WorkSpace as the "Command Center" for accessing and using all CallCenter Modules. With the WorkSpace running you can create VoiceMail windows, terminal windows, fax status windows, and windows for viewing received fax files. Once these windows are created, you can receive VoiceMail calls and send and receive faxes and data files. Furthermore, you have access to configuration dialogs for all of the modules which allow you to customize the product to suit your own needs. In Novice mode, one VoiceMail status window, one terminal window, and one fax status window are created automatically for you.

By default, the WorkSpace is run in Advanced Mode. Novice Mode provides access to the most commonly used functions, such as sending a fax or sending and receiving data files. In Novice Mode, VoiceMail acts as simple answering machine, by playing a supplied greeting and then recording the caller's message. By switching the WorkSpace to Advanced Mode you will be able to perform more sophisticated tasks, such as creating multiple mailboxes for VoiceMail, creating Fax-on-Demand systems, and creating your own custom cover pages and headers. We suggest that you switch to Advanced Mode, from the menu Options/Workspace..., once you are familiar with basic operations. The remainder of this Guide describes Novice Mode only.

When the WorkSpace is initially displayed it may have the VoiceMail, terminal, or fax window active. To see the fax or data windows and have access to faxing or data communications options, you must first activate the appropriate window. You can do this by either selecting the desired window from the Window menu or by clicking on the appropriate button in the button bar. You can see all three windows simultaneously by selecting one of the tiling options from the Window menu.

A default phone list has been created for you. We encourage you to explore the various buttons and menus while in Novice Mode. We are confident that after only a few minutes of exploration you will become familiar with how CallCenter COMPONENT Workspace works.

Using VoiceMail from TELECOMponents

TELECOMponents includes a sophisticated VoiceMail system which can be run in two distinct modes: Simple Answering Machine Mode, or Advanced VoiceMail System Mode. The system is initially configured to run in Simple Mode, but you can change to Advanced Mode by accessing the "Prompts" tab in the Voice System Setup Dialog from the VoiceMail menu. If you do decide to change to Advanced Mode you will need to record all of the prompts required by advanced mode in order to ensure proper operation of the VoiceMail system. Using advanced features, you can create your own customized telephony system including an unlimited number of personal mailboxes, personal and global Fax-on-Demand systems, and much more.

The rest of this QuickStart Guide will refer only to Simple Answering Machine Mode. For more information on Advance VoiceMail System Mode, see the online help.

The TELECOMponent window consists of two areas in Novice Mode: A VoiceMail status area, and a Keypad Dialer area. The status area displays useful information related to the current state of the VoiceMail system. In addition, it provides buttons which allow you to quickly access any received voice messages or faxes for playback or viewing. It also provides a button to allow you to quickly change the out-going greeting message and another to leave a voice memo. Lastly, the On/Off button allows you to turn the answering machine on and off.

Before you start using the answering machine you might want to record a personal out-going message. To do this, simply make sure the VoiceMail status window is visible in the WorkSpace, and that it is turned on (see the On/Off button led). Click on the Greeting... button and the voice message record dialog will be displayed. At the bottom of the window you will see an input and output device and volume controls. If you have a microphone plugged into

your modem you will want to toggle the input device by clicking on the button until the microphone icon is displayed. You may also want to make sure that the output device is configured properly as well. To record your message, simply click on the record button and then speak clearly into the microphone or handset. Click the stop button when you are done. If you would like to hear how your recording sounds, press the play button. When you are done, click the OK button. You now have a personalized recording with which to greet your callers.

Your system is now ready to receive phone calls and record caller's messages. But to give you an idea of how to listen your messages let's simulate an incoming caller leaving a message by creating a voice memo and leaving it on the answering machine. This time, click on the Memo... button and follow the same steps you followed above when recording your greeting. Once you have clicked OK in the record dialog you should notice that the LED in the upper left hand corner of the status window is blinking and the message counter reads one message. There are two ways to listen to any received voice messages as well as received fax files.

The easiest way is to simply click on the Play... button in the VoiceMail status window. A playback dialog will appear, which is very similar to the record dialog. Click on the play button to listen to your newly recorded message. Once you have listened to the message, you should notice that the LED stops blinking and the message counter resets to zero indicating that there are no unplayed messages. It is important to realize, however, that the message you just listened to has not been removed from the system. It is no longer considered as a new message but it is still accessible from the log window.

The log window displays all types of incoming and outgoing calls. Each log entry consists of detailed information about the call including: Time of call, elapsed time, destination, number, and any errors. Most importantly, the log window gives you access to received fax files, voice messages, and other information directly associated with the call. The log is divided into mailboxes. Each mailbox has three subfolders: InBox, OutBox, and Archive. You can double-click on the folders to display their contents.

To access the log window you can select Access Logs... from the Dialer menu or you can click on the yellow book in the button bar. The left side shows the available mailboxes and the right side shows all of the log entries corresponding to what is selected on the left. You can double-click on the entries to see details for those entries or use the buttons below. This window is sizable so you can size it as desired.

Many of the features available in the log window are only accessible from a popup menu. To display this menu, right-click anywhere on the surface of the log window. The number of entries that the log window can contain is limited only by available disk space. We suggest that you periodically delete log entries that you no longer need. The log window is also a convenient place to re-send failed faxes from without having to run through all the normal steps required to send a fax.

How to Make a Data Connection

Make the terminal window active as previously described. Click on the Dial button or select the

Dial... option from the Terminal menu. You will be presented with the Dial dialog. Enter the number you want to dial and select the Dial button. The number entered will be dialed and you will be connected to the remote system. Access to the phone list is also provided directly from the Dial dialog should you wish to dial an existing entry.

Once connected, to upload or download a file select the upload or download button from the button bar or pick Upload/Download File... from the Transfer menu and follow the instructions.

How to Send a Fax

Faxes may be sent by two different methods:

Print-to-fax from any Windows application by selecting Print from the application and printing to the FAX32COMPONENT Printer which was installed on your system during setup. When the Fax Wizard is displayed, follow the instructions to send the fax.

Make the fax window active as previously described. Click on the send fax button in the button bar or select Send Fax... from the Fax menu. You will be presented with the Fax Wizard. This method is good when you have existing fax documents and wish to send them. If you do not have any existing fax documents you should select the "Cover Only", or "Text Memo" option. Follow the rest of the instructions to start the send.

COMPONENT Server (Available only in the CallCenter Pro version)

The COMPONENT Server allows you to send and receive faxes and answer VoiceMail calls in the background without requiring that the entire COMPONENT Workspace or CallCenter be loaded and running. From the Server you can view logs, view received fax files, listen to voice messages and see the status of current calls. The COMPONENT Server provides only limited access to any setup options, you must run the Workspace to access all setup options.

Support

If you experience technical difficulties with CallCenter Pro, contact us at our Internet web site: <http://WWW.V3INC.COM/support.html> or from our home page, enter the CyberSupport area and follow the instructions.

Product Information. To be informed of new products, upgrades, or patches to correct problems in released versions of COMPONENTS, visit our Internet web site often. In addition we will notify all registered users who have current email addresses on file with our company.

V³, Inc. always creates a limited functional TEST DRIVE versions of our products and makes them available for FREE. This allows you to "try before you buy". These TEST DRIVE versions can be downloaded from our web site.

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