

# PhoneValet™

*Your Personal Telephone Assistant*



## User Guide



**PARLIANT**  
You Speak, Our Products Listen.  
[www.parliant.com](http://www.parliant.com)



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## **Overview**

This manual is intended to help you get to know the PhoneValet product, to get it installed and running on your computer, and to help you use it.

Inside your PhoneValet package is the Parliant Telephone Adapter (the blue box), a USB cable for connecting it to your computer, a telephone cable, and a telephone line splitter (to plug in both the Telephone Adapter and a telephone into one wall socket). Also included are this manual, and the software on a CD.

Visit the Parliant's PhoneValet web site if you need more help with PhoneValet. Go to <http://www.phonevalet.com/> for technical support, software updates, troubleshooting, and frequently asked questions that are recent and up to date.

## **System Requirements**

PhoneValet requires at least this configuration:

- Macintosh computer that meets Apple's system requirements for MacOS X
- Mac OS X 10.1.5 or higher installed
- Available USB port
- Regular (analog) phone line, with touch-tone service, near your computer.

Inbound call announcement and inbound call logging features require Caller ID service from your local telephone provider. A modem is *not* required to use PhoneValet – all the software and hardware you need is included in the PhoneValet package.

## **Installation**

### **Installing PhoneValet**

First thing to do is to plug in the Telephone Adapter device (blue box) – all the cables are included, so all you need to do is connect the USB cable to our device and to a port on your Mac, and use the phone cable to connect the device to any telephone wall-jack. If you have a telephone already plugged in to the wall, plug the splitter (included) into the wall and connect both our device and the telephone to it.

If you have purchased any PhoneValet expansion packs (to allow multiple phone lines to be used with PhoneValet), please connect all those hardware devices as well.

PhoneValet software installation is also simple – simply insert the product CD, review the “*Read Me*” file for last-minute updates, and then double-click on the **PhoneValet Installer** icon. Follow the on-screen instructions to complete the installation of PhoneValet. You will need to restart the computer after installation. If you are currently using the OpenBase database software on your computer, you may be prompted to upgrade this. Please see Appendix B for information about the OpenBase database that is included with PhoneValet.

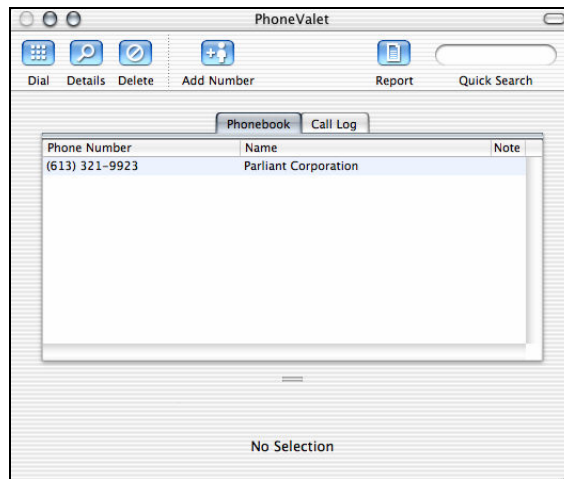
## Running PhoneValet for the First Time

Once you have successfully installed the PhoneValet hardware and software, it’s time to run the program! To run it, simply click on the **PhoneValet** icon on your desktop, or use the Finder to navigate to the Applications folder, and click on **PhoneValet**.

The first time you run PhoneValet, you will need to enter your license code for the software, which you will find on a sticker on the back cover of this manual, or on a license card in the box. On the license screen that comes up, simply click on a line, and click the **Edit...** button. Enter your license code on the panel, and edit the line-name if you want. The line name will be read to you when a call comes in, and is shown on all calls in the call log.

Click on **Next** after entering your license(s). You are now asked to enter your local area code, and whether you want to use Voice Dialing and whether you want call announcements. The area code is used to tell whether a call is local or long distance when you are dialing. If you live in a ten-digit dialing area, you can set more area codes up in the preferences later.

Once you’ve completed the above, you will end up on the main screen that looks like this:



Now you’re ready to start trying out the features of PhoneValet!

## Multiple Line Configurations

If you have more than one telephone line in your home or office, you can connect more than one Telephone Adapter to your computer (one for each line) so that you can log calls, dial and have caller announcements on all your lines. The basic PhoneValet package includes one Telephone Adapter; you may purchase additional Adapters from the Parliant web site at <http://www.phonevalet.com/>, by writing us, or phoning us at 1-866-VOICE-DIAL.

If you have purchased additional Telephone Adapters, you install them the same way as you do with the first one. If you are doing a first-time installation, connect all of them before doing the software installation. When you are asked to enter licenses to use PhoneValet, you will enter one code per Line Expansion Pack you have installed.

If you are adding a new adapter to an existing installation of PhoneValet, simply connect it to the computer and phone line, and then go into the PhoneValet preferences, click on the **Lines** tab and enter your licenses. If your new device does not show up in the preferences screen, click the **Refresh List** button; PhoneValet will then identify and show your new Telephone Adapter.

## Getting to Know PhoneValet

PhoneValet has many useful features that we will cover in the next few sections. We will show you how to...

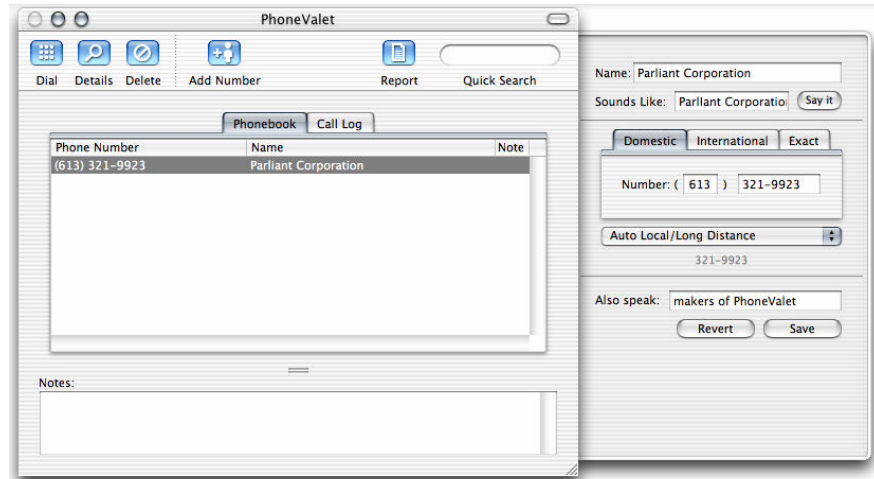
- Enter names into the phonebook
- Dial by voice or mouse-click
- Have PhoneValet announce your incoming calls
- Use the call log to track your calls in and out
- Import and export information

## The Phonebook

The PhoneValet *phonebook* stores the names and phone numbers of the people you talk to. Numbers should be entered into the phonebook for two reasons – first, it allows you to dial those names with the click of a mouse, or using the voice dialing feature. Second, if you have Caller ID, the names you enter will be displayed (and spoken out loud to you!) when those people call you.

## Adding Names and Numbers

To add a number to the phonebook, simply click the **Add Number** button on the toolbar. The Details Drawer will open (if not already visible) to the right of the screen, as below:



To add a new name, type the name into the name area. Do not put any extra words into the name (such as "Mr." at the beginning) unless you want to say those words when voice-dialing. Then, type the number with area code and the 7-digit number part. If you skip the area code, it will enter your local one for you. You don't need to type in the '1' at the start of a long distance number - PhoneValet will do that automatically for you using your dialing rules (we'll talk about those later -- dialing rules will help you make use of calling cards and other long-distance services). Hit **Save** to preserve your changes when done.

If you want to enter an international dialing number, click the **International** tab before entering the phone number. An International number will dial differently (may dial "011" instead of "1" at the start). You should not enter "011" into the number – that can be done in the dialing rules.

To dial a number, simply click on the row you want, and then click the dial button in the toolbar (or double-click on the row you want to dial.)

You can delete names from the phonebook if you want – simply select one or more names from the list and click the **Delete** button, or hit the delete button on your keyboard. To select more than one item, simply click and drag over multiple rows, or use the Option and Command keys on the keyboard, the same as you would use them in the Finder.

## Tips and Tricks

You can use the **Exact** number type (the third tab on the right of the details panel) to create special dialing numbers – exact numbers will not have any of PhoneValet’s “smarts” applied to them, such as dialing rules, 10-digit dialing, etc... If, for example, you need to dial 9 to get an outside line, you will need to put the 9 into the exact number you type. You can use the star (\*), comma (,) and pound (#) symbols in exact numbers to create special dialing cases. See Appendix A for details on this.

If you will use the voice dialing feature, it is best to type in full names instead of abbreviations (*Robert* is better than *Rob*, for instance), since this helps the voice recognition system understand you better. If you have children who want to use the voice dialer, this is even more important, as their voices are harder for the computer to understand. Longer names like *“Daddy’s Office”* are better than shorter names like *“Dad”*.

Note that you can enter the same phone number as many times as you like with different names. For example, this means the adults in your house can dial with full names, but your children can dial by simply saying *Daddy’s Office* or *Mommy’s Office*.

See **Appendix A** for information about other dialing options, 10-digit dialing, special numbers, and international calling.

There is an Also Speak entry at the bottom of the drawer. What you type here will be read out loud when a call is announced. For instance, if you type in “the kids’ dentist”, and they call you, then the call will announce as “Call from Elaine Jones, the kids’ dentist, on line one”.

## Pronunciation of Names

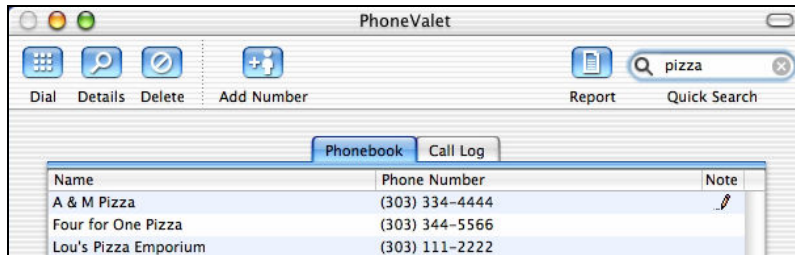
PhoneValet uses Apple’s English speech recognition system, which is very capable and will know right away how to pronounce most names that you enter, and will understand you when you say them. The computer may not pronounce certain more complicated names perfectly. To hear how the computer is going to pronounce a name, push the **Say it** button next to where you’ve just typed the name you are adding to the phonebook.

If the computer does not pronounce the name as you expect, simply type the name phonetically in the **Sounds Like** field, right under the name. For example, to get PhoneValet to correctly pronounce the name of our company (Parliant), you would type “Par lyant”. This has two benefits; it will teach the computer how to correctly pronounce the name, and it can help the computer understand you for voice-dialing.



## Searching in the Phonebook

PhoneValet has a simple but powerful searching system to help you find names or numbers in the phonebook. At the top right hand corner of the phonebook window (see the picture below) there is a text box labeled **Quick Search** you can type in. Simply type in something and as you type, the phonebook list updates to show only matching search results. You can type some or all of a name or a number - it searches automatically in both columns.



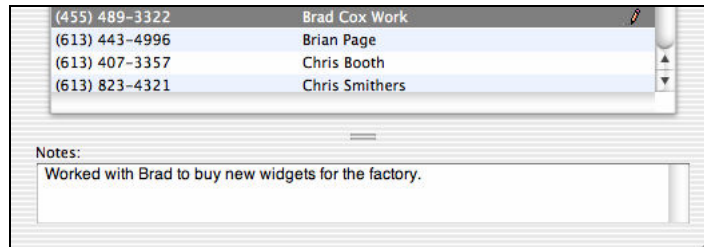
To cancel a search and return to the full list of names, simply click the (X) button at the right of the search field.

You can also sort the list by name or number by clicking on the column titles of the table - simply click on the word **Name** or **Phone Number** in the table headings. If you want to reverse the sorting, simply click on the same title a second time. Normally, the list is sorted alphabetically by name.

## Phonebook Notes

PhoneValet also lets you enter a note for each name in your phonebook. This is a free-form area where you can enter as much text as you like.

You enter notes by clicking on a name in the main phonebook screen, and typing into the notes area at the bottom (see picture below). When there's a note entered for a number in the phonebook, a little pencil icon appears in the notes column. After you type a note, pick **Save** from the **Items** menu to save it.



## Dialing

PhoneValet permits you to dial from the computer in many ways: by voice using your computer's microphone, by clicking in the call log or phonebook, by using the Apple Services menu, or directly from the Apple Address Book. Our menu-bar item permits dialing from the pasteboard, and dialing is scriptable using AppleScripts.

PhoneValet makes use of Apple's advanced speech recognition, and will work seamlessly with other speech features like Apple's "Speakable Items" voice commands. You do not have to "train" the system to understand your voice in advance of using it, as is common with other speech recognition systems - simply type the names and numbers into your phonebook and you can voice dial right away!

## Speaking Names

Unless you have customized Apple's speech system, you will know that voice dialing is available by this little window being visible on your screen:



This is called the *feedback window* and is on-screen whenever a program is ready for spoken commands. By default, the system will only listen to you when you hold down the ESC key on your keyboard, but this can be changed. The key required is printed in the light blue area in the center of the feedback window.

To try out voice dialing now, simply hold down the ESC key and say "Call" and then say a name from your phonebook, for instance "Call Bob Smith". You can also say "Phone" or "Dial" instead of "Call".

PhoneValet will listen to the name you spoke, and look up that name in the phonebook. Then, this panel will appear on screen:



To start the dialing, simply pick up the phone and dialing will begin – the panel will go away as soon as the dialing starts. If it displays the wrong name, you can simply click Cancel on the dialing panel and try again. If it doesn't understand what you said, three little question marks "???" will be printed in a bubble right above the speech feedback window – all you need to do is speak again.

## Tuning the speech system

If the system has trouble recognizing you, there are two things to do. If it is a particular name that isn't working, then use the **Sounds Like** field in the phonebook details screen to customize the pronunciation. Use the **Say it** button to make the computer's pronunciation match yours'.

If the system fails to recognize you on many names, you can use the System Preferences speech panel to tune your speech settings. Simply click on the PhoneValet icon in the menu bar (📞) and pick the **Open Speech Preferences...** option, or launch the **System Preferences** program (available on the Apple menu) and click on the **Speech** icon. In MacOS X 10.2 and higher, there is a very useful microphone volume control that tunes the system to recognize your voice even in areas where there's lots of background noise.

For details on tuning the microphone and speech systems, simply search for "speech" in the help for Apple's System Preferences.

## Services Menu Dialing

Apple provides a Services menu that appears in the main menu (*the menu with the application's name in bold*) of many Mac OS X applications. PhoneValet adds items to that menu that allow you to dial phone numbers from other applications.

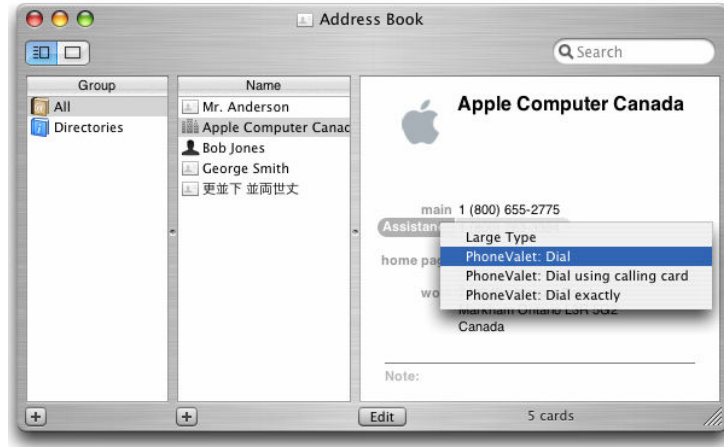
If you're in a program that is displaying a phone number, select (highlight) that phone number with the mouse, click on the Application's menu, then on the **Services** menu and pick **Dial Number with PhoneValet**, and then pick either "**Automatically**", "**By Selecting a Dialing Rule**", or "**Exactly as Typed**" from the submenu. The dialing panel will pop up and you can pick up any phone to start the dialing, same as above with voice-dialing. If you want to select a dialing rule, you will first be offered a window with a list of your dialing rules to choose from.

Note that some applications do not implement the Services menu; in those applications you will see a Services menu with no items in it, and this feature will not work. For those applications, you may want to use the Clipboard dialing feature described below.

## Address Book Dialing

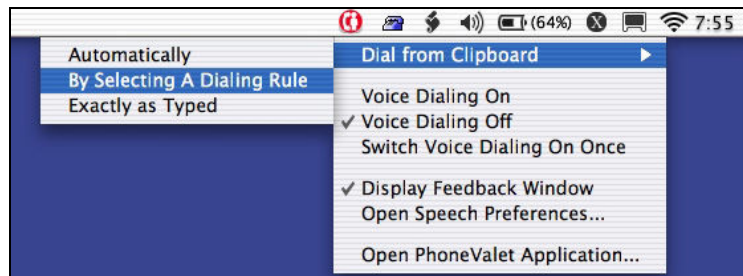
PhoneValet integrates with Apple's Address Book application in Mac OS X 10.3 "Panther" to allow you to dial phone numbers directly from within the Address Book application. This feature is not available with Mac OS X 10.2 or earlier.

As you see in the screenshot below, you can click on the menu associated with any phone number and pick one of the PhoneValet dialing items. The **Dial** item will cause PhoneValet to examine the number, and attempt to automatically apply your dialing rules and 10-digit dialing preferences to decide how best to dial the number. If you want to select a specific calling card or dial a number exactly as given, select the alternate menu items.



## Clipboard Dialing

PhoneValet offers clipboard dialing from the menu-bar item at the top-right of the screen (📞). This is offered to provide dialing from applications that don't support services, such as Mac OS "Classic" applications. To use this feature, copy a phone number onto the pasteboard from any application. Then, click on our menu-bar icon and select an option from the **Dial from Clipboard** submenu.



## AppleScript dialing

PhoneValet provides a dialing service to AppleScripts by providing three simple commands that match the dialing options as above.

The commands are "dial number" (for automatic use of PhoneValet dialing rules), "dialExact number" (for dialing exactly the digits given) and "dialWithChoice number" (which will prompt the user for a calling card/dialing rule).

A simple AppleScript to dial looks like the following, which will automatically process the number 613-321-9923 for long-distance dialing rules and then dial it.

```
tell application "ValetDialer.service"
    dial number "613-321-9923"
end tell
```

PhoneValet ships with some example scripts in the "Extras" folder on the product CD. Additional examples will be provided on Parliant's web site at <http://www.parliant.com/support/phonevalet/>

One example is automatically installed; a set of dialing scripts for Microsoft's Entourage email program. If you have Entourage on your computer, these scripts are installed when you run PhoneValet, and are available from Entourage's scripts menu. To use the scripts, highlight a phone number in the text of an email, and select the appropriate PhoneValet dialing option from the scripts menu.

## Call Logging

PhoneValet records all numbers you dial from any of your connected phones. PhoneValet will track and record the numbers and save the entries in your Call Log. For each call you make, it records the name (if known), the number, the date, the time the call was started, and the duration of the call. If you have multiple phone lines and multiple Telephone Adapters, then the Call Log will keep track of calls on each of your connected lines. One report will list all of the calls, and can be sorted by each individual phone line.

## Caller ID

Caller ID is a service provided by your local phone company (sometimes called Call Display), that tells you the number of the person calling you, as the call comes in. If you subscribe to Caller ID service, PhoneValet will store information on the calls you receive. This is identical to your Outgoing Call Log – date, number called, name, time call started, and duration of the call.

Caller ID service has a name service option (included by many phone companies, optional with others), which tells you the name of the caller as well as the number. Caller ID does not generally permit long names. It would announce "Michelangelo's Pizzeria" as something like "Mic. Pzza". However, if you have entered a name into the phonebook for the given number, that name will be announced in full, just as you have entered it in the phonebook. If you have not entered the name in the phonebook, the name provided by the Caller ID service would be announced as the call comes in, and recorded in the log.

## Dialing Numbers from the Call Log

If you are at your computer and you see a number in your call log that you would like to call, simply double-click on the number in question. A panel will come up on the screen confirming the number. Simply pick up any phone, and the number will be dialed.

## Making Comments in the Call Log

You can add a note for each call in the log. A note can help you remember what the call was about, which is especially useful if you use the call log for client billing or tracking your phone usage. Any comments that you enter can be included in call log exports that you make – for more information, see the Importing and Exporting chapter below. Notes work exactly the same way as in the phonebook – you enter them in the Notes area at the bottom of the screen, and you get a pencil icon in the **Notes** column when a note has been entered.

## Adding Call Log Names to Your Phonebook

If you see a number in your call log that you want to be able to voice-dial later on, click on that number and select **Add Number** from the toolbar. You will be switched to the Phonebook tab, and the name and number will be pre-typed for you. Simply make any edits you want and click the **Save** button (or pick **Save** from the **Items** menu).

## Reading the Call Log

To get details for a call, simply click the details button to show the drawer on the right side of the main window. You can make changes to the name and number of a call – mainly so you can correct missing information, in case you use the call log for billing or time tracking. On international calls, Caller ID information is frequently not provided, so the call will log but there won't be a name or number. In this case, you can edit the call as you like.

For each call, a letter code identifies the type of call:

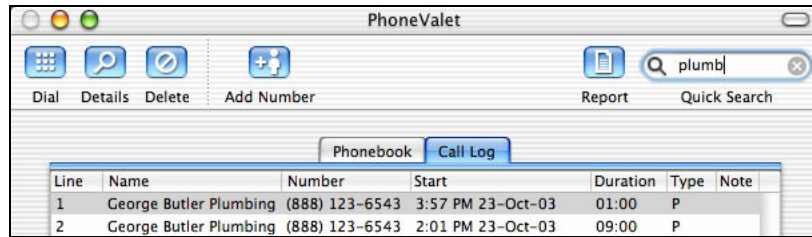
- P Placed Call
- A Incoming call (answered)
- U Incoming call (unanswered)

You can sort the call log by name, number, type, etc... by clicking on the column titles. By default, the list is sorted in date order with the most recent calls first. If you click a second time in a column title, the sorting is reversed.

You can delete calls from the log if you want – simply select one or more calls from the log and click the **Delete** button, or hit the delete button on your keyboard. To select more than one item, simply click and drag over multiple rows, or use the Option and Command keys on the keyboard, the same as you would use them in the Finder.

## Searching in the Call Log

PhoneValet has a simple but powerful searching system to help you find names or numbers in the call log. At the top right hand corner of the call log window (see the picture below) there is a text box labeled **Quick Search** you can type in. Simply type in something and as you type, the call list updates to show only matching items. You can type some or all of a name or a number - it searches automatically in both columns. To cancel a search and return to the full list of names, simply click the (X) button at the right of the search field.

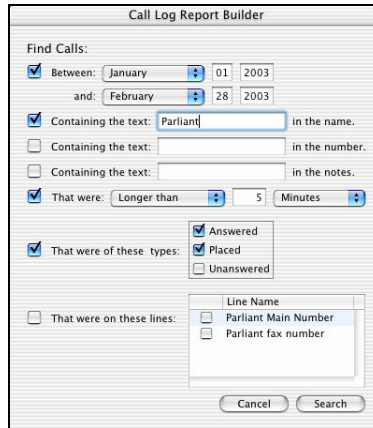


You can also sort the list by name, number, time, etc... by clicking on the column titles of the table. If you want to reverse the sorting, simply click on the same title a second time. Normally, the log is sorted by date and time with the most recent calls at the top.

## Call Log Reporting

The **Report** button on the toolbar permits you to make advanced searches in the call log. This is designed for those people who want to do more flexible searching for the purposes of building a timesheet, phone log, etc...

When you click on the report button, you are given a panel that looks like this:



The screenshot shows a dialog box titled "Call Log Report Builder". It contains several search criteria sections:

- Find Calls:**
  - Between: January 01, 2003 and February 28, 2003
  - Containing the text: Parliant in the name.
  - Containing the text: in the number.
  - Containing the text: in the notes.
  - That were: Longer than 5 Minutes
  - That were of these types:
    - Answered
    - Placed
    - Unanswered
  - That were on these lines:
    - Line Name
    - Parliant Main Number
    - Parliant fax number

At the bottom of the dialog are "Cancel" and "Search" buttons.

To search by one of these criteria, check the box to the left, and then enter the appropriate search terms. You can search in a date range, inside the text of the name, number and notes, and by the duration of the call. You can also filter calls based on which line they came in on, and whether they are incoming or outgoing calls.

When you're finished entering criteria, click the **Search** button. Your results will be displayed in the **Call Log** tab. You can simply export those rows to a file – see below for import/export instructions. When you search, the word -REPORT- will be written in the quick-search field in the toolbar. To cancel the report, and return to the complete list of calls, simply click the (X) button on the right of the quick-search field.

## Caller ID Announcements

PhoneValet has a convenient feature for announcing the names of incoming callers using your computer's speakers and on-screen. To use this feature, you need to subscribe to the Caller ID service from your local phone company. This feature can save you having to run over to the phone or Caller ID box to find out who's calling, especially if you don't want to answer the call!

Caller ID announcement can be turned on and off in the preferences. You can also instruct PhoneValet not to speak callers' names at certain times (like during the night) and pick the size



of the on-screen announcement window. To do this, go into the preferences screen (click on the **PhoneValet** menu and pick **Preferences...**), and click on the **Speech** tab.

If you have the caller's name/number in your phonebook, then PhoneValet will speak and display that name. Otherwise, PhoneValet will use the name of the caller as provided by your Caller ID service. See the section **Caller ID** above on page 11 for details about Caller ID service and name display options. The Caller ID service does not provide full names if they are long. For instance, "McDonald's Restaurant" might be displayed as "McDlds Rst". PhoneValet lets you take names from the log of incoming calls and make them as long as you want. Incoming calls are then announced and logged in the way you have chosen. This is very convenient if your children call their friends, and get calls from them. The Caller ID feature would only give the caller name in the way it is listed in the phone book. You could identify that number the way your child uses it – "Susie", for example.

Call Announcements will come in even when the PhoneValet application is not running. You must run PhoneValet at least once after installing, but after that, the call announcement program will start each time you log in and run in the background.

## **Call Actions**

PhoneValet allows multiple kinds of call actions – emails can be sent on each call, and you can write your own AppleScripts which can be run on each call and given the Caller ID information. PhoneValet can also update your iChat status when you're on the phone.

### **Email Call Action**

You can configure PhoneValet to send an email each time a call comes in. You configure this from the **Call Actions** panel which can be found on the **PhoneValet** main menu. Click on the **Email** tab and enter the information your Internet service provider gave you for email sending, and the address you which you want the emails sent.

Email will be sent whenever the computer is connected to the Internet and is on. There is no need for a user to be logged in – emails will be sent even if the login panel is showing.

An upcoming release of PhoneValet will allow more selective sending of email.

### **AppleScript Call Actions**

AppleScript actions can be run when calls come in while a user is logged into the computer. They will not run while the login panel is on-screen (or the computer is off!).

You can write your own AppleScripts starting with the provided example (look in the **Extras** folder on the product CD for more examples). PhoneValet runs an AppleScript function and

passes it all the information available about the caller (name, number, date). The scripts are run at the same time as the call is announced on-screen (just before the second ring).

From the **Call Actions** panel, click on the AppleScripts tab to see a list of available scripts. When you write your own script, simply place the scripts into the **/Library/Application Support/Parliant/CallActionScripts** folder, and then go into the **Call Actions** panel and check those scripts that you want to run.

More detail about how to write AppleScripts and additional example scripts will be provided over time on the PhoneValet support website at <http://www.parliant.com/support/phonevalet/>.

## **iChat Notifications**

Under the **Call Actions** preferences panel is an option to have your current online status in iChat updated each time you start and end a phone call.

When you activate this option, each time you pick up a telephone, PhoneValet alters your online status message from *Available* to *Away* with a message "*I am on the phone*". When you hang up the telephone, it sets your status back to *Available* again.

The iChat feature does not prevent people from attempting to contact you for voice, text or video chats - it simply lets your friends know that you're on the phone. This feature will not disconnect any ongoing chats that you may have going.

## **Importing and Exporting**

PhoneValet provides advanced features to collect names and numbers you may have already entered into other address book programs on your computer, as well as to let you pull out names and call log information to use in other programs.

### **Importing Names and Numbers into the Phonebook**

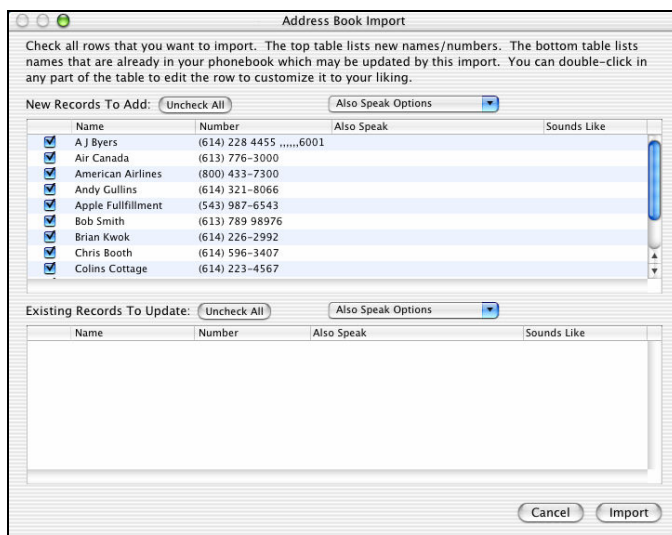
PhoneValet's import feature allows you to add existing phone listings to the phonebook from Apple's Address Book (on Mac OS X 10.2 and higher), or from comma- or tab-delimited files. This can save you from having to type names and numbers in by hand, if you've already done that in these other programs.

Parliant has tested the file import to work with the programs below, although exports from many other programs may work. Future updates of PhoneValet will enable imports from other programs. Please visit our support website at <http://www.phonevalet.com/support/> for updated information, and for help on ways to convert your files into a supported format.

- Microsoft Entourage v.X
- Palm Desktop (tested with versions 2.6 and 4.1)
- Now Contact (tested with v4.2; use the "Default" export template)
- Big Island YoYo phonebook

To import from Apple's Address Book, simply select **Import from Address Book** from the **Items -> Import/Export Items** menu. To import from another program, go into that program and export the data that you want to use into a comma- or tab-delimited file (this is the format most programs use). Once you saved the file from the other program, simply select **Import from File** from the **Items -> Import/Export Items** menu.

PhoneValet will search through your Address Book or file, and then take you to the import screen that looks like this:



This screen shows you what will be imported. The upper half of the screen shows you new names/numbers that you can import. The lower section shows you names that already exist in your phonebook but which have a different phone number in the import data.

You can choose not to import a number by simply un-checking the box in the left column. If you only want to import a small set of numbers, then click the **Uncheck All** button, and then check only those records you want.

You may edit any of the fields you see on-screen – just double-click on a name, number, etc... and start typing. If you want to set the "Also Speak" (which is spoken to you when calls come in

from that number), you can automatically fill that column with either the company name, job title, or both. Click on the **Also Speak Options** pull-down and select what you would like to see. **NOTE:** Make sure you select an also-speak option before manually editing the Sounds Like fields – using that pull-down later on will replace your typing in that column!

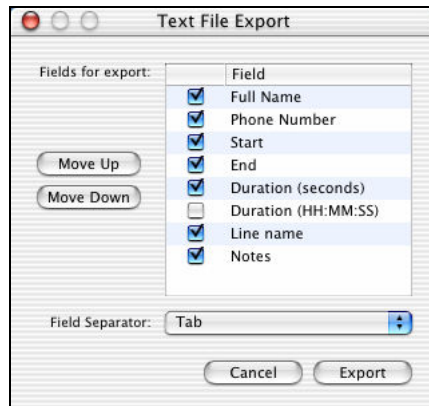
When you're done adding entries, push the **Import** button, and you will be returned to the main screen, and your new numbers will be in the phonebook.

## Exporting from the Phonebook and Call Log

You can export the names and numbers from the PhoneValet phonebook, as well as the records in the call log to a file. Exporting the phonebook can help populate the address book of another program. Exporting the call log can help you if you need to bill people for the time you spend on the phone.

You can either export the whole call log or phonebook, the results of a search, or just the rows that you have selected with the mouse. Click on the either the **Call Log** or **Phonebook** tab as appropriate so that the data you want to export is on the screen. Then, Select **Export Displayed Items to File** from the **Items -> Import/Export Items** menu. If you want to export only some of the rows that are visible in the list, select them with the mouse by click-and-drag or using the command and option keys, and then pick the **Export Selected Items to File** item from that same submenu.

On the panel that comes up (see below), pick the file type you want (comma- or tab-delimited), and which fields you wish to export (simply un-check the ones you don't want). If you click on a field name, and then click the **Move Up** or **Move Down** buttons, then you can reorder the fields.



When you've configured the export to your satisfaction, click the **Export** button. The standard save panel will come up. PhoneValet presets the file name to have an extension of .tsv for tab-separated files, and .csv for comma-separated files. We recommend you preserve the file extension even if you rename the file, so that other programs will have an easier time loading these files. For instance, Microsoft Excel can automatically load our PhoneValet's comma-separated files and place each field into its own column.

# Appendix A: Advanced Dial Settings

## Dialing Rules

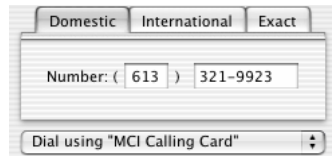
PhoneValet uses your **Local** and **Long Distance** preferences to help dial the phone. In particular, you configure PhoneValet to understand that you may need to dial certain numbers before or after a phone number in order to complete the call. In an office, you may have to dial 9 to get an outside line. In many large cities, you may need to dial the area code as part of the number even when making a local call (this is often called *10-digit dialing*).

Note that there may be no need to change the default dialing settings, especially if you only have a single regular phone line. If you go into the preferences (Click on the **PhoneValet** menu, and select **Preferences...**) you can configure your dialing setup.

On the **Local** preferences tab, you can set your local area code (which is important!), and other area codes that may be in your local calling area. If you live in an area where you need to do 10- or 11-digit dialing, then you should enter your other local area codes, and choose the right way to dial (7, 10 or 11 digits).

## Setting up Calling Cards and Long Distance Access Numbers

On the **Long Distance** tab, you can configure how numbers should be dialed when they're long distance. Most of the time, PhoneValet will automatically detect a long-distance number and dial it using the Default dialing rule. If you make long-distance calls using a calling card, or with a 1-800 or "10 10" access number, you can configure a new rule for each way you want to dial. You can set a number in the phonebook to be dialed with any dialing rule you set up – once you save your preferences, simply click on the pop-up below the number, and pick one of your dialing rules as in this picture below.



To create a new dialing rule, click on the **Rules** pull-down in the **Long Distance** preferences and pick **Add New....**, then type in a name for your dialing rule. If you're using a service that requires you to dial an access number, type that into the **First dial** section. If you also need to type a PIN or other code before the number, separate the access number and the PIN by some commas – each comma causes a 1 second delay before dialing the rest of the numbers. For instance, you might have a "First Dial" of "1-888-222-3333,,,,,12345678" which would mean to dial 1-888-222-3333, then pause 5 seconds, then dial the PIN 12345678, and then the software would dial the actual area code and number of the caller.

If you have a traditional calling card, you might enter just "0" in the **First dial** field, and put ".,.,.12345678" in the **Last dial** field. This would cause the software to dial 0, the area code and the number, then pause 4 seconds, and the dial your PIN 12345678.

## 10-digit and 11-digit dialing

When configured for 10/11-digit dialing, PhoneValet will dial all 10/11 digits for local calls in the specified area codes(s). When entering domestic numbers, PhoneValet will automatically add your local area code. Just make sure to enter all of your city's area codes into the **Local** preferences panel.

If you enter a number which is in your local area code, but which you know to be long distance, you can simply pick the **Force to Long Distance** dialing rule which is always available when editing the phonebook. This will cause PhoneValet to dial the number with the default long-distance dialing rule. You can also pick any of the dialing rules you have created if you want dialing using a calling card or access number.

## Special Dialing Characters

### Comma (,)

A comma in a phone number will cause a pause of 1 second when PhoneValet dials your call. For example, the number **(203) 227-9700,,21** will dial 203-227-9700, wait 2 seconds, and then dial 21. This is useful if you're dialing an automated service that wants you to enter numbers or codes, such as an automated attendant, phone banking system or other automated phone system which has a predictable delay between prompts.

### Star and Pound (\* and #)

You may embed the # and \* characters in the numbers you enter, and they will be dialed correctly.

## **Appendix B: Troubleshooting**

### **Verifying that the Telephone Adapter (Blue Box) is functioning**

The LED (the small red light) on the top of the Telephone Adapter can be used to verify proper operation.

#### **INACTIVE MODE (without the PhoneValet software running):**

- If the red LED is flashing ON for a half second and OFF for 2 seconds, then PhoneValet is not active (i.e. it is connected correctly but the PhoneValet software is not running on your PC at the time).
- If the red LED is flashing rapidly, then the USB drivers are not installed or are not working. It may be that a reinstall of PhoneValet is required – visit <http://www.parliant.com/support/phonevalet/> on the web for support.
- If the red LED is OFF, then the USB cable is disconnected or the USB port is disabled or there is not any power to the adapter. If you have verified these, and the lights remain off, then the adapter may be damaged.

#### **ACTIVE MODE (with the PhoneValet software running):**

- If the red LED is solid ON, then the software is active and ready to dial.
- If the red LED is flashing ON for 2 seconds and OFF for a half second, then the software is active and a phone is OFF Hook. (Off hook means that a phone has been lifted from its cradle somewhere on the line.)

### **About USB Ports and Hubs**

The PhoneValet Telephone Adapter is a high-speed USB device. As such, it must be connected to full-speed USB 1.1 ports, such as those which are built into your Macintosh. You may have USB ports on your keyboard or monitor - these may be low-speed ports intended only for devices like keyboards, mice, or joysticks, and may not work with PhoneValet.

If you use a USB hub (which gives you extra ports), make sure to use one which provides full-speed USB 1.1 ports. Most USB hubs will work nicely as long as they are plugged directly into a USB port on the computer. If you have many devices connected to a hub, you may need to use a hub that has its own power supply.

### **Technical Support**

If you need help with Parliant's PhoneValet, the place to start is our web site for all sorts of technical resources, including updated documentation, frequently asked questions and other information about USB and telephony issues. If you don't find your answer on our web site,

there is a form you can fill out to send a message to Parliant's Technical Support team. Simply click on the **Contact Us** link that's on every page of the Parliant site.

**Web Site:** <http://www.phonevalet.com/support/>

## Software Updates

PhoneValet has the built-in ability to find and download updates to the software over the Internet. You can check for updates by selecting **Check for updates** from the **PhoneValet** menu. The software will see if there's a new version by contacting Parliant's Internet server. If there is a new version, you will be asked if you want to download and install it. Simply say yes to the upgrade and it will be downloaded and installed automatically.

Updates and improvements will be made continuously, and are free of charge. For major revisions, or for additions of whole new feature sets, there may be an upgrade charge.



# **Appendix C: Certification and Warranty Information**

## **CERTIFICATION INFORMATION**

### **FCC Part 68 Certification**

This equipment complies with FCC rules, Part 68. On the bottom side of this equipment is a label that contains, among other information, the FCC Registration Number and Ringer Equivalence Number (REN) for this equipment. If requested, provide this information to your telephone company.

The (REN) is useful to determine the quantity of devices you may connect to your telephone line and still have all of those devices Ring when your number is called. In most, but not all areas, the sum of the REN's of all devices should not exceed five (5.0). To be certain of the number of devices you may connect to your line, as determined by the REN, you should contact your local telephone company to determine the maximum REN for your calling area.

If this equipment causes harm to the telephone network, the Telephone Company may discontinue your service temporarily. If possible, they will notify you in advance. But if advance notice isn't practical, you will be notified as soon as possible. You will be advised of your right to file a complaint with the FCC.

Your telephone company may make changes in its facilities, equipment, operations, or procedures that could affect the proper operation of your equipment. If they do, you will be given advance notice so as to give you an opportunity to maintain uninterrupted service.

If you experience trouble with this equipment, please contact the manufacturer for warranty/repair information. The telephone company may ask that you disconnect this equipment from the network until the problem has been corrected or until you are sure that the equipment is not malfunctioning.

This equipment may not be used on coin service provided by the telephone company. Connection to party lines is subject to state tariffs.

### **FCC Part 15 Class Certification**

This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

1. Reorient or relocate the receiving antenna.
2. Increase the separation between the equipment and receiver.
3. Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
4. Consult the dealer or an experienced radio/TV technician for help.

Only shielded I/O cables should be used in order to insure compliance with FCC emission limits.

### **Canadian Department of Communications Compliance Statement**

The Industry Canada label identifies certified equipment. This certification means that the equipment meets telecommunications network protective, operation and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The Department does not guarantee the equipment will operate to the user's satisfaction. Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The equipment must also be installed using an acceptable method of connection. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

Repairs to certified equipment should be coordinated by a representative designated by the supplier. Any repairs or alterations made by the user to this equipment, or equipment malfunctions, may give the telecommunications company cause to request the user to disconnect the equipment.

Users should ensure for their own protection that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

CAUTION: Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.

NOTICE: The Ringer Equivalence Number (REN) assigned to each terminal device provides an indication of the maximum number of terminals allowed to be connected to a telephone interface. The termination on an interface may consist of any

## WARRANTY INFORMATION

The warranties described below are extended only to the original purchaser and are not transferable.

### **LIMITED WARRANTY: Software**

PARLIANT warrants that the Software will perform substantially in accordance with its accompanying documentation for a period of one (1) year from the date of purchase.

EXCEPT AS SET FORTH IN THE PRECEDING SENTENCE, PARLIANT AND ITS SUPPLIERS DISCLAIM ALL OTHER WARRANTIES OR CONDITIONS OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, CONTINUATION OF ANY SERVICE OR FUNCTION PROVIDED THROUGH THE INTERNET OR NON-INFRINGEMENT. NEITHER PARLIANT NOR ITS SUPPLIERS WARRANT THAT THE FUNCTIONS CONTAINED IN THE SOFTWARE WILL MEET YOUR REQUIREMENTS OR THE OPERATION OF THE SOFTWARE WILL BE UNINTERRUPTED OR ERROR-FREE. YOU AGREE TO ASSUME FULL RESPONSIBILITY FOR THE SELECTION OF THE SOFTWARE TO ACHIEVE YOUR INTENDED RESULTS, AND FOR THE INSTALLATION, USE AND RESULTS OBTAINED FROM THE SOFTWARE. YOU ALSO ASSUME THE ENTIRE RISK OF ANY USE OF THE SOFTWARE. NO DISTRIBUTOR, DEALER OR ANY OTHER ENTITY OR PERSON IS AUTHORIZED TO EXPAND OR ALTER THIS WARRANTY.

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### **LIMITED WARRANTY: Hardware**

#### **1. Customer Obligations:**

A. CUSTOMER assumes full responsibility that the product purchased and any copies of software included with it or licensed separately, meet the specifications, capacity, and other requirements of the customer.

B. CUSTOMER assumes full responsibility for the installation and effectiveness of the operating environment in which the product and software are to function.

#### **2. Limited Warranties And Conditions Of Sale:**

A. Manufacturer warrants that this product is free from all defects in materials and workmanship for one (1) year from the date of purchase from an authorized dealer.

B. Except as provided herein no employee, agent, franchise, dealer or other person is authorized to give any warranties of any nature on behalf of manufacturer.

#### **3. Repairs And Service:**

A. In the event of malfunction or failure attributable directly to faulty workmanship and/or materials, the product should be taken to the original authorized dealer it was purchased from or sent to manufacturer, along with proof of purchase and the return merchandise authorization number (RMA) provided by manufacturer.

B. If the product is sent by mail or freight company, the purchaser agrees to pay shipping charges, insure the product or assume the risk of loss or damage which may occur in transit, and to use a shipping container equivalent to the original packaging.

C. Once a product is returned, manufacturer will at its option, repair or replace the defective product or components, to whatever extent it deems necessary to restore the product or component to proper operating condition.

D. Manufacturer shall not be liable for any damages caused by delay in delivering or furnishing equipment and/or software.

#### **4. Limitation Of Liability:**

A. THE CUSTOMER SHALL BE SOLELY RESPONSIBLE FOR THE FAILURE OF THIS PRODUCT OR COMPONENT THEREON, RESULTING FROM ACCIDENT, ABUSE, OR MISAPPLICATION OF THE PRODUCT, AND MANUFACTURER ASSUMES NO LIABILITY AS A CONSEQUENCE OF SUCH EVENTS UNDER THE TERMS OF THIS WARRANTY.

B. WHILE MANUFACTURER HAS MADE EVERY EFFORT TO PROVIDE CLEAR AND ACCURATE TECHNICAL INFORMATION ABOUT THE APPLICATION OF ITS PRODUCTS, MANUFACTURER ASSUMES NO LIABILITY FOR ANY EVENTS ARISING OUT OF THE USE OF THE TECHNICAL INFORMATION.

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D. NO ACTION SHALL BE BROUGHT FOR BREACH OF ANY IMPLIED OR EXPRESSED WARRANTY AFTER 30 DAYS SUBSEQUENT TO THE EXPIRATION OF THE PERIOD OF THE EXPRESSED WRITTEN WARRANTY.

E. INCIDENTAL AND CONSEQUENTIAL DAMAGES CAUSED BY MALFUNCTION, DEFECT OR OTHERWISE AND WITH RESPECT TO BREACH OF ANY EXPRESSED OR IMPLIED WARRANTY ARE NOT THE RESPONSIBILITY OF MANUFACTURER, AND TO THE EXTENT PERMITTED BY LAW ARE HEREBY EXCLUDED BOTH FOR PROPERTY AND TO THE EXTENT NOT UNCONSCIONABLE, FOR PERSONAL INJURY DAMAGE.

F. IN ANY EVENT, MANUFACTURER LIABILITY SHALL NOT EXCEED THE PRICE OF THE PRODUCT.

G. SOME STATES/PROVINCES DO NOT ALLOW THE EXCLUSION OF IMPLIED WARRANTIES OR LIMITATIONS ON HOW LONG AN IMPLIED WARRANTY MAY LAST, SO THE ABOVE LIMITATIONS MAY NOT APPLY TO YOU. THIS WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS. YOU MAY HAVE OTHER RIGHTS WHICH MAY VARY FROM STATE/PROVINCE TO STATE/PROVINCE.

H. THIS WARRANTY APPLIES ONLY TO THIS PRODUCT, AND IS GOVERNED BY THE LAWS OF THE PROVINCE OF ONTARIO, CANADA. LAWSUITS BASED ON ANY CLAIM ARISING FROM USAGE OF THIS PRODUCT MUST BE FILED AND PERSECUTED IN A COURT OF COMPETENT JURISDICTION LOCATED IN THE CITY OF OTTAWA, PROVINCE OF ONTARIO, CANADA.

The specifications contained in this document are subject to change without notice.

#### **Bundled Third-Party Software**

The PhoneValet software includes the BDControl framework which comes with the following statement which covers the BDControl portions of the PhoneValet software:

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## Please do not discard this manual!

You will need this license code if you ever re-install the software.  
The Support Code (S/C) below is used to identify your product for  
us to provide product support, if you ever need it.

### This is your PhoneValet License Code:

Product Name:

License Code:

Support Code:



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