

PhoneValet™

Message Center



User Guide

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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, 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.

Parliant's first-generation Telephone Adapter is a translucent blue box, and our second-generation adapter is a grey color. The second-generation device is included with PhoneValet Message Center, and adds voicemail, call recording and other advanced capabilities.

Visit the Parliant's PhoneValet web site if you need more help with PhoneValet. Go to <http://www.phonevalet.com/> for up-to-date technical support resources, and software updates.

System Requirements

PhoneValet requires at least this configuration:

- Macintosh computer that meets Apple's system requirements for MacOS X
- Mac OS X 10.2 or higher installed
- QuickTime 6.5 or higher installed
- Available USB port
- Regular (analog) phone line, with touch-tone service, near your computer.

Inbound call announcement/ringtones, call blocking 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. If you want to receive faxes with our voice mail/fax integration, then you will need a shared-line fax machine, or a compatible modem to receive faxes with (such as Apple's internal modems) along with fax software such as PageSender or Mac OS 10.3's built-in faxing support.

Installation

Installing PhoneValet

First thing to do is to plug in the Telephone Adapter device – 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 additional Telephone Adapters (to allow multiple phone lines to be used with PhoneValet), please connect all those devices as well. If you are using a USB hub, make sure that it has its own power supply – see page 41 for details.

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 it. Please see page 41 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

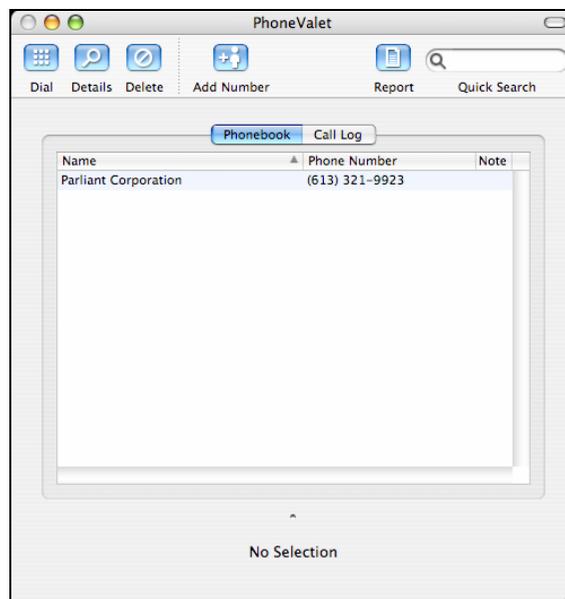
to navigate to the Applications folder, and click on **PhoneValet**. There is another application called **PhoneValet Message Center** which we will discuss later on...

The first time you run PhoneValet, you will need to enter your license code(s) 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.

If you have ordered PhoneValet Anywhere or other add-on options, first enter your Message Center line licenses as above, and then click on the **Add...** button on the bottom right of the panel to enter the option license(s). Option licenses are usually delivered by email.

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 Mail, Voice Dialing and 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!

If you have purchased PhoneValet Anywhere, see page 42 for installation help.

The Message Center

The PhoneValet Message Center product includes two applications. The application simply called **PhoneValet** is the main application, and gives you access to your phonebook, your whole call history including all voice mails and call recordings, and all the preferences.

The second application called **PhoneValet Message Center** is provided to give you convenient access to your recent incoming calls and voice mail messages in a quick way. It acts like a typical answering machine and/or Caller ID box does, showing you what calls you've had recently, and your recent messages. It also shows you which messages are new and which ones you've already listened to. We'll see more about this application in the Voice Mail section.

PhoneValet Anywhere is an add-on option to PhoneValet that allows access to the phonebook and call log using a web browser, and also provides networked Caller ID announcements. See page 36 for more information.

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 PhoneValet package is sold by-line, and you can obtain additional lines from the Parliant web site at <http://www.phonevalet.com/>, or by phoning us at 1-866-864-2334.

If you have 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 Adapter 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 General 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 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
- Use the voice mail system
- Dial by voice or mouse-click
- Use the call log to track your calls in and out
- Record your calls
- Have PhoneValet announce your incoming calls
- Import and export information
- Use Call Actions to run AppleScripts
- Remote-Control your computer by calling in

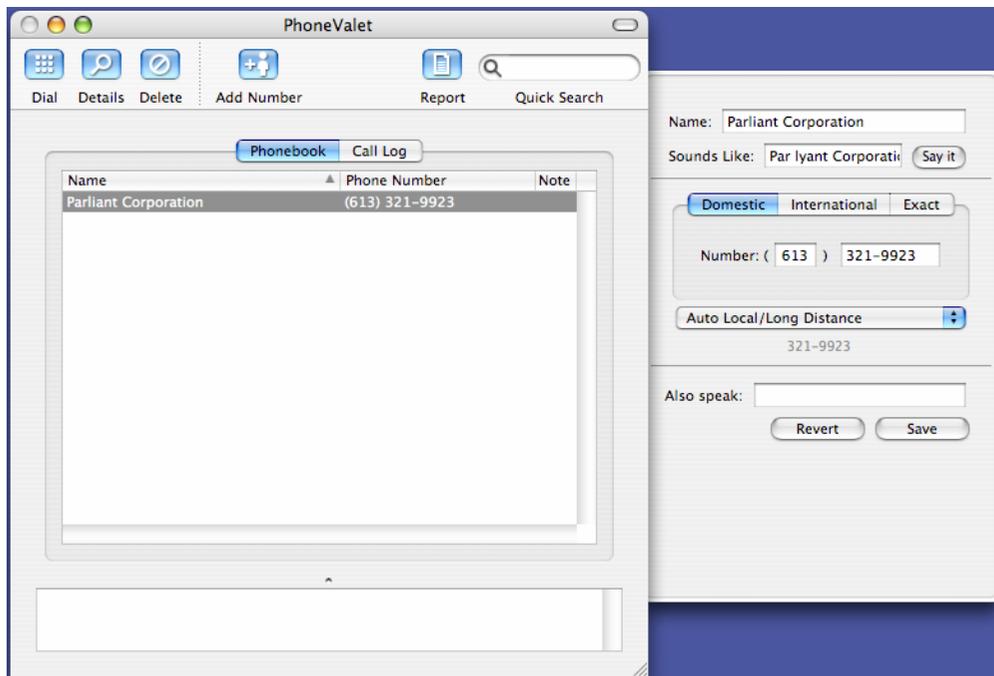
The Phonebook

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. New in PhoneValet 3.0, you can configure custom ringtones and voicemail greetings for people and block calls based on phonebook entries too.

The Phonebook is not intended to replace your address book or contact manager software; simply to provide a way to setup names and numbers for dialing and custom announcements. See below for information on importing names and numbers from other software programs, including Apple's built-in Address Book application.

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.

If you have set up profiles for ringtones, custom greetings or call blocking, select the profile from the pull-down at the bottom of the details drawer.

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 page 40 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

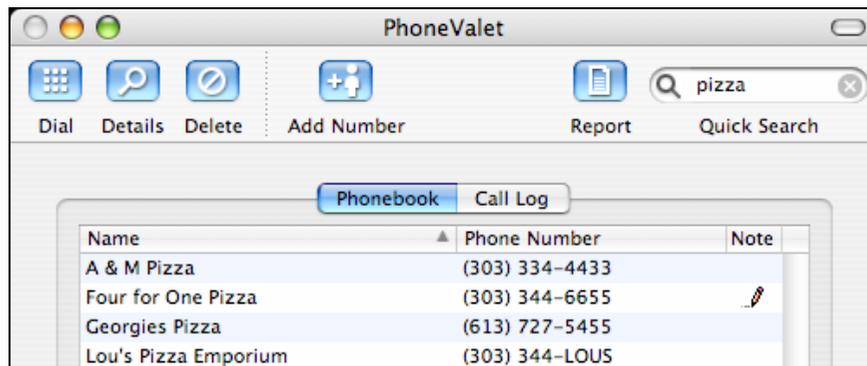
PhoneValet uses Apple’s English speech recognition system, which is very capable and will know right away how to pronounce most names that you enter, and will understand you when you say them. The computer may not pronounce certain more complicated names perfectly.

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.



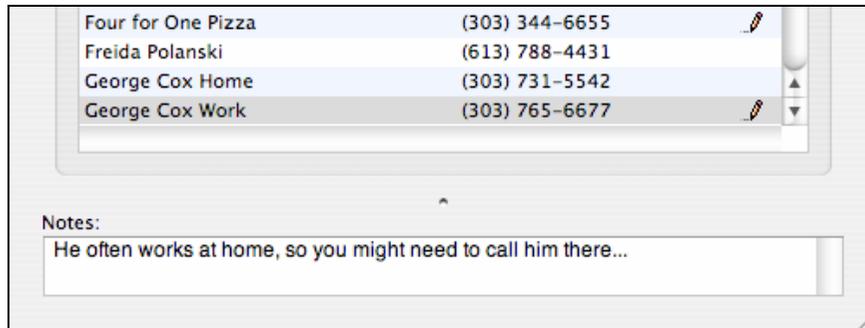
To cancel a search and return to the full list of names, simply click the (X) button at the right of the search field.

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.



Voice Mail

The voice mail system lets your Macintosh act as an advanced answering system. When active, the voice mail system will answer all calls after a set number of rings, play the caller a greeting you provide, and let the caller leave a message. With additional Telephone Adapters, this voice mail can extend to multiple phone lines with ease.

If you choose, you can set up to 10 separate options for callers to select from. The options can be mailboxes for people in your home or office, or announcement-only options for information services. The caller in this case would press one of the digits 0-9 to pick an option. They would then be played a second greeting (specific to the option), and may leave a message.

You can set custom greetings and other custom voice mail handling for particular callers. See page 15 for details on how to do this.

Voice Mail Workflow

If you have only the Default option enabled, PhoneValet acts like a normal answering machine - it will play the main greeting, beep, and then take a message.

If you have any of the 0-9 options enabled, then PhoneValet will answer the call as above, but after playing the main greeting it will pause for a few seconds to let people make a choice of option by pressing the appropriate number on their phone. The caller can make their choice during the greeting, or during the pause.

If the caller doesn't make a choice, then PhoneValet will beep and take a message in the default mailbox. If the caller does make a choice, then that option's greeting will be played. If the option is a mailbox, then there will be a beep and the caller can leave their message.

At any time during a mailbox greeting, the caller can press the pound (#) button on their phone - if they do, the greeting will stop, there will be a beep, and PhoneValet will take a message. This lets people who know your setup to not have to listen to the whole greeting. You can also press the * button to enter remote-control mode – see the section on Remote Control below.

Configuring Voice Mail

To configure the voice mail, click on the **PhoneValet** menu, and select **Preferences • Voice Mail...** On this screen, you can enable the voice mail feature, select the number of rings to answer and set what the maximum length of message you want is (PhoneValet will hang up on the caller after that long, if the caller doesn't hang up).

Your main greeting is the sound that plays when the voice mail first answers a call. The Play button to the left allows you to hear the current greeting. To change the greeting, click the **Set...** button in the **Main Greeting** section. See below for details on setting greetings.

The center of the screen shows you the caller's options (0-9), allows you to activate/deactivate them using the checkboxes, and provides access to edit an option's settings. You can edit the option names in the table, and set the type of option (Mailbox or Announcement).

Mailbox Options

All messages are stored in mailboxes. There is a default mailbox for messages, and there are 10 custom options (numbered 0-9). Custom mailboxes allow you to assign a unique mailbox for each person in an office or home, or to assign mailboxes by department for a business.

To setup a mailbox, first enable it by clicking the checkbox next to the mailbox you want, and make sure to set the **Type** to 'Mailbox'. Then, with that row highlighted, click the **Edit...** button below the table. On the Mailbox Settings screen, you can select whether or not you want a mailbox greeting played. This mailbox greeting will be played to the caller after they've pressed a button to select the mailbox. To record/select a mailbox greeting, click the **Set...** button.

You can also set the mailbox to send an email (including the message as a sound file attachment) by checking that option on, and entering an email address. The email will be sent after the caller hangs up from leaving a message. See page 30 for help on email settings.

Announcement Options

Announcement options let you build an information system into your voicemail. By setting one or more options as Announcements, you can deliver messages to your callers such as business hours messages, event/theatre/club listings, etc...

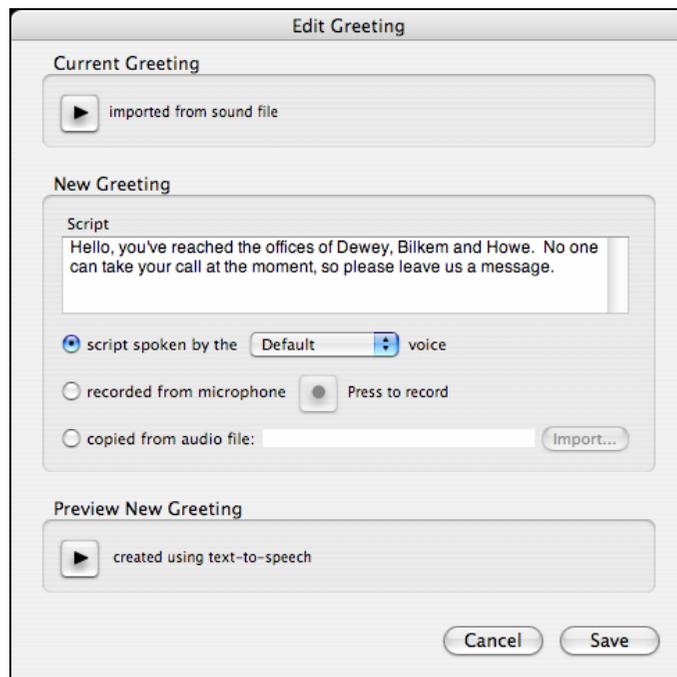
To create an announcement option, check the box to enable an option, and select “Announcement” as the **Type**. Then, click on the **Edit...** button to set the announcement message that will be played, and to decide how to route the caller after the message.

You can opt to hang up on the caller after the announcement is played, replay the message up to 5 times before hanging up, or return the caller to the main greeting for them to select another option. If the caller returns to the main greeting, they can select another option – either another announcement or a mailbox.

Announcements are made the same way as mailbox greetings, as described below.

Greetings

The Edit Greeting screen lets you listen to the current set greeting, and to change the greeting. There are three ways to set a greeting – by recording one on your computer’s microphone, by using Apple’s text-to-speech system, or by using a pre-made sound file that you already have.



To record a greeting, make sure you have a microphone installed, click the radio button to the left of the “recorded from microphone” option, and then click the record button (●). Start speaking right away into the microphone, and then click stop (■) when you’re done. To hear your recording, click the play button at the bottom of the panel.

To use text-to-speech for your greeting, simply type the greeting text into the space provided, and click the radio button to the left of the “script spoken by” option. After you’ve typed the greeting in, click the play button at the bottom of the panel to hear it.

To select a pre-made audio file, click the radio option named “copied from audio file” and then click the **Import...** button to pick a sound file. PhoneValet supports a wide variety of sound file formats for greetings, including WAV, AIFF, MP3, AAC, and others.

Call Screening

PhoneValet has the ability to let you screen your calls – as a caller is leaving a voice mail message, you can have the message played live through your computer’s speakers. This option is enabled in the General Preferences panel under the **Incoming Calls** tab.

Once the caller selects a voice mail box and hears the greeting, they hear a beep and can start to leave their message. At the same time as they start to leave a message, PhoneValet will start to play the message through your computer’s speakers.

You can set PhoneValet not to screen calls at certain times (like during the night), by clicking on the **Set Times...** button. The times are used to quiet both call screening and spoken call announcements.

Advanced Features

If you have multiple Telephone Adapters, PhoneValet will automatically activate voice mail on all the lines, so you don't have to do anything to make that happen. If you don't want voice mail on one or more of the lines for any reason, you can do so. Click on the **Advanced Settings...** button at the bottom of the voice mail preferences panel. Simply un-check the lines that you don't want voice mail to run on.

You may also set a custom main greeting for each line that you have enabled for voice mail. This can be helpful for home businesses, to allow a personal greeting on a home line, and a professional greeting on the business line(s). From the Line Settings panel (as above), highlight a line, and click the **Set Greeting...** button to add/change a custom greeting, or the **Remove Greeting...** button to set that line back to the regular main greeting.

In this scenario, you might assign some of the options as mailboxes for your business use (for example, 1 for sales, 2 for customer service, 3 for accounting), and assign the other higher-numbered options for your family members' personal use.

File Formats

PhoneValet supports recording voice mail messages (and call recordings) in one of a few file formats. You select these from the PhoneValet application’s General Preferences panel, under the **Recordings** tab. Parliant strongly recommends selecting the 3GPP format, since it offers superb audio quality and very small files (76 KB/minute). The AAC format (300 KB/minute) is provided for compatibility, and is not recommended unless you have a specific need for that file format. The final option is the WAV format which is the largest (470 KB/minute). You might select WAV format if you intend to edit or convert the audio yourself for radio interviews, “podcasting”, and other uses, since this is a lossless uncompressed audio format.

The 3GPP and AAC formats require a recent version of QuickTime (6.5 or higher) or other third-party sound software to be played. 3GPP and AAC files can also be played on Windows computers with QuickTime installed. If QuickTime won't be available on the computer you're copying/emailing to, then the WAV format is recommended – that format can be played on virtually any Mac (including Mac OS 8/9) or Windows computer with no extra software installed.

Managing Voice Mail with the Message Center

When a voice mail message is taken, it is stored along with the call information in the call log. To see how to use the call log to access your voice mails, see the call log section on page 26.

The **PhoneValet Message Center** application provides a convenient way to listen to your recent messages and see your recent incoming calls. Looking at the screen, your new messages are shown in the table in bold text. To listen to a message, simply click on the row, and then click the play button at the bottom of the window (or just double-click on the call's row). You can use the back and forwards buttons to jump about 5 seconds back/forward in the message, or drag the slider around to move around in the message. After you've listened to a message, that row becomes un-bolded.

To call back the caller for any call, click the **Call Back** button. If you want to forward a call and message by email, click the **Email Message** button in the toolbar. If you want to make notes about a given call, click the **Open in Call Log** button to see the call in the PhoneValet application's call log, so you can enter notes. NOTE: Some of these toolbar items may be hidden by default – simply CONTROL-click in the toolbar and select **Customize Toolbar...** to enable them.

Incoming calls without voice mail message may also be shown, depending on your preferences (under the **Other** tab in the General Preferences). Unanswered or even answered incoming calls can be shown – you can tell the difference, since these calls do not have a mailbox or message icon. You might show these calls in order to get a quick summary of all people who have called you recently. If you want to quickly focus on the messages, click the **Clear Calls** button in the toolbar which saves all non-message calls to the call log in one go, and removes them from the Message Center screen.

If you get a lot of messages, you can focus the list of calls on a given mailbox using the pull-down list (labeled **Showing:**) in the top-right of the screen. Simply select a particular mailbox and all other messages will be hidden.

Calling in to Check Messages

You can listen to and manage your voice mail messages from a remote location by calling in to PhoneValet on your Mac. This works as follows: you call in and let PhoneValet's voice mail answer the call. You then press star (*) during the greeting to enter Remote Control mode, and then enter your secret code, followed by the pound (#) button to enter message-check mode. You enable this feature and set the secret code from the Remote Control preferences (see *page 20*).

The system will tell you how many messages you have, and you may then press 1 to hear only your unheard messages, 2 for all your recent messages, or 3 to review all your messages. Your recent messages are those that appear in the PhoneValet Message Center application, described in the previous section. In all cases, you review your messages in order starting with the most recent.

PhoneValet will start playing you the message, telling you who called and when, and then letting you hear the message that was left. You can press star (*) at any time during the message playback to skip to the end of that message. At the end of the message, the system presents you with a menu of options – you can press 1 to replay the current message, 2 to save this message into the call log (i.e. so that it is no longer *recent*), or 3 to erase this message. You can also press pound (#) to skip to the next message (leaving the current message as *recent*), or press star (*) to return to the main menu as above. All the options (1, 2, 3, #) are also available **during** the message, so you don't have to wait for the menu – if you select one of those options, it will automatically perform the correct action.

Unheard messages remain listed as unheard for the duration of the call (even if you return to the main menu), but will be marked as heard once you hang up. All messages remain in the recent list, until they are saved or erased, either through the call-in interface, or using the Message Center application. If you save or erase a message, this takes effect right away, and cannot be un-done.

Receiving Faxes

Since the PhoneValet voice mail answers all calls, it could prevent you from receiving a fax with a fax machine or any fax software that runs on the same phone line. Many homes and small businesses do not wish to have an extra line just for faxes, and instead share a line for both voice and fax calls. PhoneValet offers three options for receiving faxes: using a shared-line fax machine, by using Mac OS 10.3's built-in fax features, or by using the feature-rich PageSender software product on all of PhoneValet's supported Mac OS releases (10.1.5+).

Many fax machines support shared-line fax receiving, such as the Hewlett-Packard "G series" all-in-one printer/fax/scanner devices and many others. These devices eavesdrop on your phone calls, and if they detect a fax coming in, they pick up the line and receive the fax. PhoneValet's voice mail feature is compatible with this – if it detects a fax coming in, it will stop the voice mail process, and hold the line open silently until the fax machine picks up to answer.

If you prefer to receive faxes using your computer, PhoneValet interoperates with the PageSender product from SmileOnMyMac and the Mac OS 10.3+ built-in faxing. A demo of PageSender is included in the **Extras** folder on the PhoneValet Message Center CD, or you can download/buy the latest version from <http://www.smileonmymac.com/>. Use of PageSender or Mac OS faxing requires a fax/modem of your own, such as the internal modems that Apple includes in most Macs. You must connect the phone line to both the Parliant Telephone Adapter and the modem (using a splitter such as is provided with PhoneValet – three-way splitters are available at almost any electronics/phone store).

To receive faxes, simply go into the **Incoming Calls** tab of the PhoneValet General Preferences panel, check the “Receive faxes” option, and select the line that your faxes come in on and which of the two software methods you want to use.

For PageSender, go into the **Page Center Fax Center’s** Preferences panel, and make sure that your PageSender preferences are correct. Make sure to set PageSender **NOT** to answer calls after you’ve set your fax-receive preferences (click on the **Receive** preferences and un-check the “Receive faxes after <#> rings” option). PhoneValet will automatically ask PageSender to answer fax calls as needed.

For Mac OS faxing, open the **System Preferences** application (it’s on the Apple menu, top-left), click on the **Print & Fax** section, then click on the **Faxing** tab. Make sure your fax preferences are setup as desired, and after they are make sure to un-check the **Receive faxes on this computer** option. PhoneValet will automatically ask the Mac OS to answer fax calls as needed.

Once setup as above, if PhoneValet’s voice mail detects an incoming fax, it will ask the selected software to answer the call. Once the fax software answers the call, the voice mail system will hang up to let the fax be received. For performance on older computers with PageSender, it is best to leave the **Page Sender Fax Center** application running all the time, to avoid the need to start the software each time a fax comes in.

Call Blocking, Ringtones and Custom Voice Mail Handling

Based on Caller ID, you can use the Phonebook to customize how your callers are handled when they call you. This is made possible using caller profiles. You make profiles that describe what to do when calls come in – playing ringtones, blocking calls, etc. You then assign profiles to people listed in your phonebook (in the Details drawer) so that calls from those people are handled specially. You can assign the same profile to as many phonebook entries as you like.

For calls where Caller ID doesn’t send a number, you can assign a profile that will apply to calls that are reported as “out of area” by Caller ID. Another profile can be used to handle Caller ID “private numbers”, where the caller blocked their phone number.

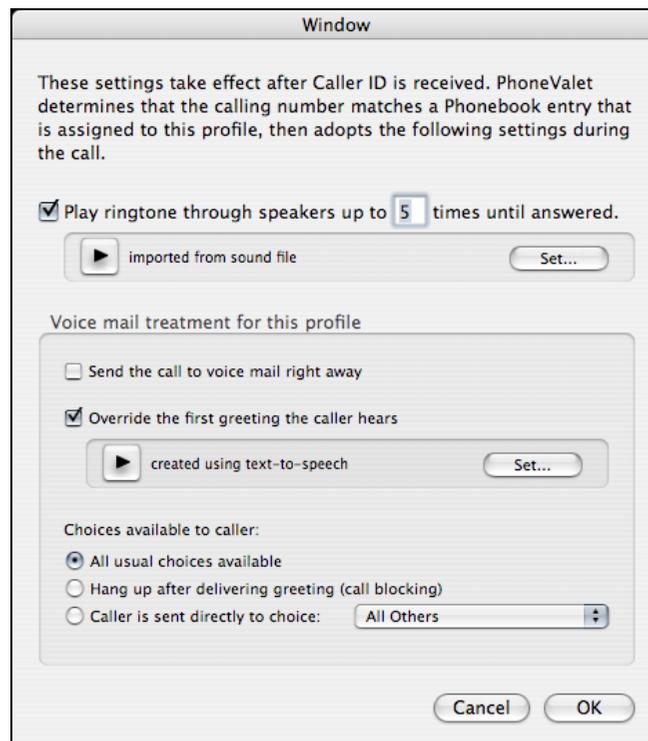
Profiles can do one or more of the following things when a caller calls in:

- Play a ringtone (sound)
- Send caller to voice mail immediately
- Block the call by playing a message and then hanging up
- Play a custom greeting to the caller instead of the normal main greeting
- Send the caller to a specific mailbox directly

Creating Profiles

To create profiles, click on the main menu, and click on **Preferences** and then **Profiles...** From the window that comes up, you can add, edit and delete profiles. At the bottom of the panel, you can set the profile to use for out-of-area and “private” callers.

If you add or edit a profile, you will see the profile editing screen, as follows:



At the top, you can specify a ringtone to be played when a call comes in – to do so, check the **Play ringtone...** box, and click the **Set...** button to set the ringtone. Similarly to the voice mail greetings setup, you can make a ringtone by selecting a sound/music file, by recording from a microphone, or using text-to-speech. Ringtones can be repeated as many times as you like until the phone is answered, and you can set the number of repeats under the **up to <> times** field – the default is to play the ringtone once.

Below the ringtone settings are the voice mail options. Each of the options can be used separately, or in combination with each other. Here are the options and what they mean:

- Send the call to voice mail right away

This option will cause PhoneValet to answer the call and go to voice mail as soon as the Caller ID is received, rather than waiting for the normal number of rings. In most countries, this will happen between the first and second rings of the phone. In the UK, Caller ID comes in before the first ring, so the phone may not ring even once.

- Override the first greeting the caller hears

This option overrides the greeting the caller would normally hear when PhoneValet first answers the phone. The caller will not hear the regular main greeting, only the custom greeting you set up. To set the greeting, click the **Set...** button.

- Choices available to the caller

This option sets what options the caller has once the PhoneValet voice mail has answered the call. The “**All usual choices available**” option means that the full set of mailbox options is available to the caller (0-9 and the default mailbox). This option also permits the caller to select Remote Control mode using (*).

The “**Hang up after delivering greeting**” option is used for call blocking or delivering custom messages where you don’t want the caller to be able to leave a message. For call blocking, you should override the first greeting (as in the previous option) with one that says “Your call has been blocked” or something to that effect. As soon as the greeting has been played once, the call is dropped. The caller in this case may not leave a message, and cannot use Remote Control.

The “**Caller is sent directly to choice**” option allows you to drop the caller directly into a particular voicemail mailbox, without playing them the normal main greeting and giving them the standard mailbox choices. You select the desired mailbox/announcement option from the pull-down list. The caller hears only the greeting for the particular mailbox and then gets to leave a message. For “announcement” style mailboxes, the caller hears the specified message and then either gets hung up on or is transferred to the main menu/greeting – as configured in the announcement mailbox.

About Blocking Calls and Faxes

The “**Hang up after delivering greeting**” option is used to block calls, as described above. To prevent the phone from ringing many times, make sure to also activate the “**send the call to voice mail right away**” option. To make best use of this feature, you should set a custom greeting using the “**Override the first greeting**” option. Otherwise your normal main greeting will be played (which probably tells the caller what options are available), but of course these options are not available to this caller since PhoneValet is about to hang up on them.

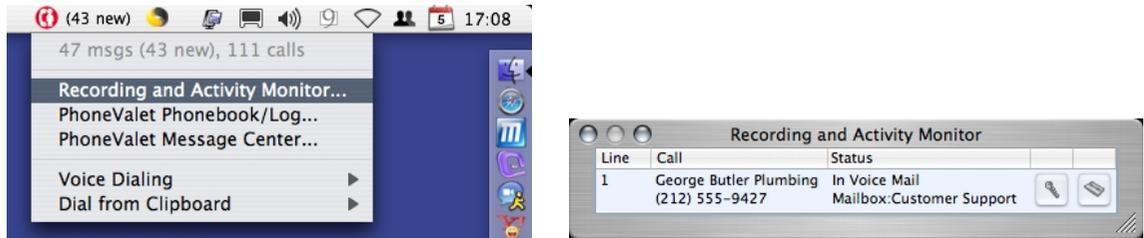
If you intend to block calls from known fax numbers and you have a shared-line fax machine, you should set a very short custom greeting to prevent a fax machine on the line from answering. These fax machines monitor the phone line listening for fax calls, and answer as needed. In some cases, these fax machines are very “aggressive” at trying to answer, and may pick up the call before PhoneValet has a chance to hang up. If this happens, you may want to set a loud noisy custom greeting – in some cases this can prevent the local fax machine from “hearing” the calling fax machine until PhoneValet has hung up.

If you are blocking faxes and are using software like PageSender or the Mac OS X fax integration, then you do not need to do this trick – PhoneValet will not transfer blocked fax calls to those software packages.

The Activity Monitor

The Activity Monitor lets you watch what's going on with your phone line(s), provides access to the call recording feature, and allows you to send calls ringing in directly to voice mail. You can watch in "real time" as calls are dialed, answered, sent to voicemail, and even find out what mailbox the caller is leaving a message in.

The Activity Monitor is designed to be small enough that you could leave it on-screen all the time if you wanted. To show the Monitor window, click on the PhoneValet menu bar icon (📞) and select the **Recording and Activity Monitor...** option.



For each line, you will see the current status of the call (ringing, in voice mail, call in progress, etc...), and under the **Call** column, you will see the number of the caller or the number you dialed. If you have more than one line, simply resize the window to show all your lines – the default window is only tall enough for one line's information.

If a call is ringing in, click on the cassette-tape button (📞) to send the call to voice mail right away. The caller is sent immediately to voice mail with the main greeting, and your phone should stop ringing right away. This is convenient to use if you are too busy to take the call, or you don't want to speak to the caller at that time. This button is only enabled when a call is ringing in, and after Caller ID is received (or after the second ring if you don't have Caller ID service).

Call Recording

PhoneValet offers the ability to record your telephone conversations. When you do so, PhoneValet listens to your phone call, and records both ends of the conversation into a sound file. When the call is over, you can simply click on the given call in the call log to listen to the recording. You can record calls on multiple lines at the same time.

To initiate recording, display the **Activity Monitor** as described just above, pick up the phone to start your call, and then click the microphone/record button (📞) to start recording. The button will immediately turn into a stop-recording button (📞) which you can click to stop recording. Note that you can only start recording when a phone on that line is off-hook – if no phone is off-hook, the recording button is disabled. If you want to record yourself dialing the call, feel free to

start recording right after picking up the phone (when the dial tone is still heard,) and then dial the call with the phone.

Once you start recording, it will run until the end of the call (i.e. you hang up), or until you stop it with the panel's stop button as above. If you stop recording during a call, you can start it again later on. If you restart recording, you will end up with a single recording for the call with a beep inserted at the point where you paused. You may stop and restart recording as often as you wish during a call – but make sure to wait a few seconds in between starting/stopping.

Sound Files and Audio Quality

The call recordings are stored in standard sound files, and you select the format for files from the **Recordings** section of the General Preferences panel. As with voice mail, Parliant recommends the 3GPP format, since in our experience it offers the best sound quality and smallest file size. If you need to share your call recordings with Windows PC users, the best choice is the WAV format.

A common problem with call recording products is that you sound much louder than the person you're calling in the recording. The Parliant Telephony Adapter has automatic volume control which tries to compensate for the difference in volume between you speaking locally, and the remote caller who probably sounds much quieter. To improve the sound quality of the remote caller's voice, try to reduce background noise (music, fans, etc...) around you – many phones will pick up a lot of background noise and that noise could make it into the recording.

Remote Control

Remote Control is a feature that works along with the voice mail feature to let you dial in and run programs on your computer from away. You can set up any number of AppleScripts to run based on secret codes that you punch in when calling in. Scripts can do anything that's possible with AppleScript – read you the weather, ask your computer to reboot, read you your calendar appointments for today, play you a song, etc...

A remote-control AppleScript is just like any other AppleScript, but PhoneValet will provide the script with the caller's details and other parameters that are useful for writing the script. Also, the script may return a sound file to be played back to the caller, or some text which the computer will read back to you using Apple's text-to-speech system.

To enter remote-control mode, call in to the voice mail from away. While the voice mail greeting is playing, dial star (*) on your phone. The system will beep twice to indicate you're in remote-control mode. Then, to run one of your scripts, simply enter that script's secret code followed by the pound (#) key. Depending on the script you write, the system will say something back to you, play a sound file, or simply quietly run the script. After the script is done, you'll get another double-beep indicating you can enter a new code. You can run up to 5 scripts per call.

To configure Remote Control scripts, click on the main menu and select Preferences • **Remote Control...** In the panel, add a script using the **Add Control** button, and then assign a numerical code to the script, select the script file to run, and enter the parameter (if your script wants one). You also need to select what kind of information the script returns – does it return nothing (i.e. it will run silently), does it return some text to be spoken to the caller, or does it return the filename of a sound file to be played?

Example Scripts

Parliant provides some useful example scripts to let you see what kinds of things can be done. These examples are pre-installed in the correct location on your computer, but you need to set them up to run, by adding them to the scripts list and assigning them secret code(s) as above.

The *Todays/Cal* script will read you the list of current events and times listed in your iCal calendar. Simply add the script, assign a secret code and set the **Feedback** type to be **Text to be spoken**.

The *Todays Now Up-to-Date* script is similar to the above, but reads you your events as listed in your Now Up-to-Date calendar. As above, set the **Feedback** type to be **Text to be spoken**.

The *US Weather* script will read you the weather, as provided from a US National Weather Service web site. To use this, add the script, assign it a secret code, set the **Feedback** type to **Text to be spoken** and then enter your ZIP code in the **Parameter** column.

The *Canadian Weather* script will read you the weather, as provided from an Environment Canada web site. To use this, add the script, assign it a secret code, set the **Feedback** type to **Text to be spoken** and then enter your nearest airport code (such as *yyz* for Toronto, *yow* for Ottawa, *yvr* for Vancouver, *yul* for Montréal, etc...) in the **Parameter** column.

The *PlayGivenSoundFile* script will play the sound file as specified in the **Parameter** column – simply type in the complete path to a sound file (in Unix-style */path/to/file* or Mac-style *Macintosh HD:path:to:file* formats). Set the **Feedback** type to **Name of sound file to play**.

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!

Dialing by voice

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 (📞), select **Voice Dialing**, and then **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

PhoneValet adds items to the Services menu to allow you to dial from a wide variety of Mac applications, simply by highlighting the number and clicking on the menu. Apple’s Services menu appears in the main menu (*the menu with the application’s name in bold*) of many Mac OS X 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. A new script in PhoneValet 2.0 (**PhoneValet – Dial Contact**) allows you to highlight an email message to dial the sender, or highlight a contact in a list to dial that person.

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.

The Call Log also serves as the archive for all your voicemail messages and call recordings.

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 – you can even enter notes when the call is in progress. 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)
- M Incoming call with a voice mail message
- R Incoming call (Remote Control was used)

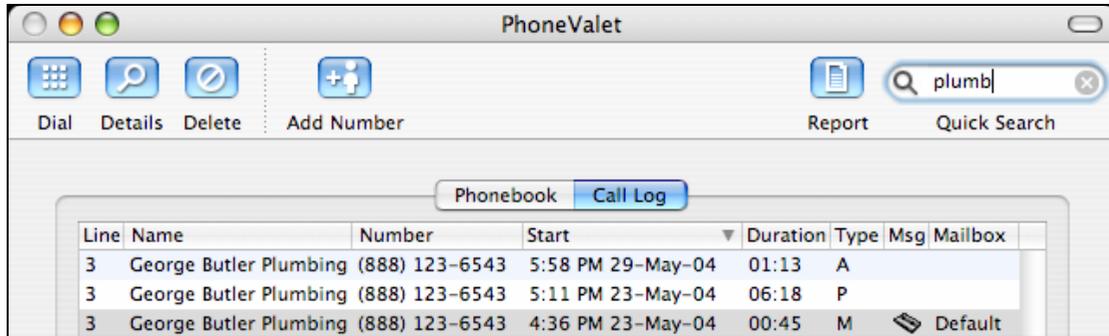
You can sort the call log by name, number, type, etc... by clicking on the column titles. By default, the list is sorted in date order with the most recent calls first. If you click a second time in a column title, the sorting is reversed.

The **Msg** column shows an icon when that call has a voice mail message (a cassette tape icon) or a call recording (a microphone icon). For voice mails the Mailbox column shows the mailbox that the message was left in.

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.

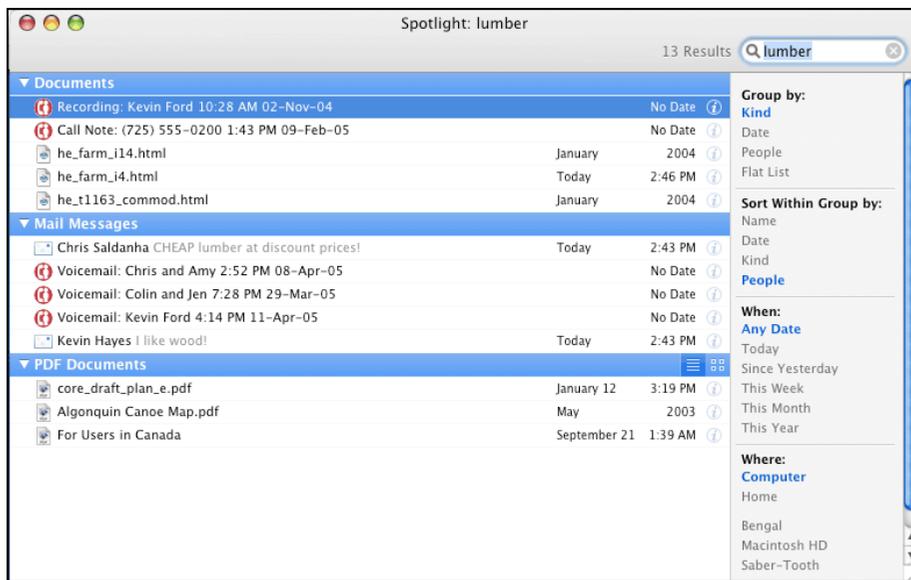


You can also sort the list by name, number, time, etc... by clicking on the column titles of the table. If you want to reverse the sorting, simply click on the same title a second time. Normally, the log is sorted by date and time with the most recent calls at the top.

Spotlight Searching in Mac OS X “Tiger”

Starting with Mac OS X 10.4 “Tiger”, Apple has provided a system-wide search tool called Spotlight. PhoneValet includes a Spotlight plug-in (installed automatically) that allows searching of the PhoneValet Call Log from Spotlight.

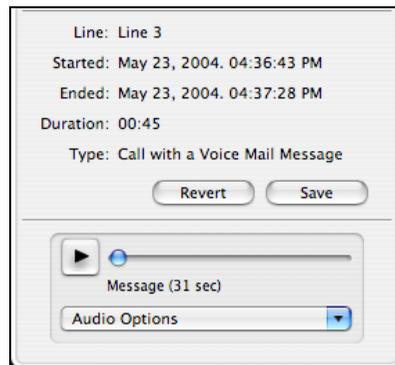
You can search on many aspects of a call – the name, number, notes, duration of message/recording, length of call, etc. In the following screen picture, you can see a search for “lumber”, which has matched some calls’ notes. Note that the voice mail calls appear in the “Messages” section along with emails, and other calls appear in the “Documents” section. Clicking on a call in Spotlight search results will open the call in the PhoneValet call log.



In the PhoneValet General Preferences, under the **Other** tab, you can opt to enable Spotlight indexing. By default, indexing is on in Mac OS X 10.4, and indexes “interesting” calls – voice mail messages, recorded calls and calls with notes. A second option called **Include all calls** will cause Spotlight to index all your calls. For people with large call logs, including all calls may produce too many results in Spotlight and make it difficult to “weed through” the results.

Playing Voice Mails and Recordings

To play a voice mail or call recording, simply highlight the call in the log, open the Details drawer, and use the convenient sound-playing controls at the bottom of the details drawer.

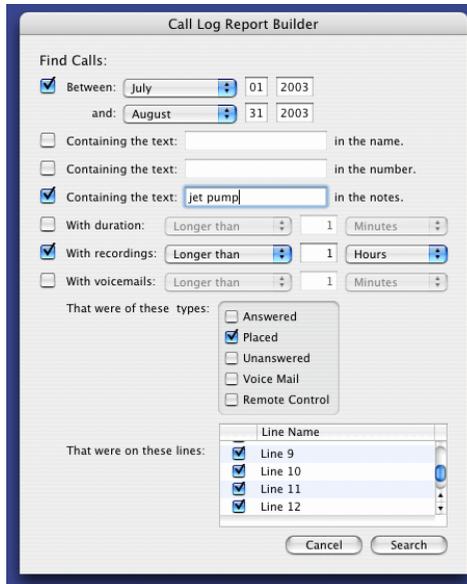


To remove the audio recording for a given call, click on the **Audio Options** pull-down, and select **Delete the Recording**. If you want direct access to the audio file that contains the message/recording, simply select **Reveal Audio File in Finder** from that pull-down, and a Finder window will open with the sound file selected.

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 sections for filtering calls:

- Find Calls:**
 - Between:** July 01 2003 and August 31 2003
 - Containing the text:** [] in the name.
 - Containing the text:** [] in the number.
 - Containing the text:** [jet pump] in the notes.
 - With duration:** Longer than 1 Minutes
 - With recordings:** Longer than 1 Hours
 - With voicemails:** Longer than 1 Minutes
- That were of these types:**
 - Answered
 - Placed
 - Unanswered
 - Voice Mail
 - Remote Control
- That were on these lines:**
 - Line 9
 - Line 10
 - Line 11
 - Line 12

At the bottom 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 • General...**), and click on the **Incoming Calls** 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 25 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 and AppleScripts

PhoneValet allows multiple kinds of call actions – emails can be sent on each call, and you can write your own AppleScripts which run when a call comes in, when you pick up or hang up the phone, and after voice mail messages are left and call recordings are made. For example, PhoneValet can update your iChat status and mute iTunes when you're on the phone.

Email on Incoming Calls

You can configure PhoneValet to send an email each time a call comes in. Email will be sent when a call comes in with Caller ID. No email is sent if there is no Caller ID (or you don't have Caller ID service), since there's no information to tell you about. There is no need for a user to be logged in – emails will be sent even if the login panel is showing.

You configure this from the General Preferences panel. Click on the **Incoming Calls** tab and enter the address to which you want the emails sent, as well as what kind of calls you want

emails sent for. You can also include voice mail message attachments (if there are any for a given call).

You also need to click on the **Other** tab and enter the information your Internet service provider gave you for email sending. If your email settings require a password, an SSL secure connection, or an alternate port setting, click on the **Advanced...** button to access these settings. For password-required connections, you should set the Authentication type to **Plain** if you are not sure what to pick. If you don't need a username or password, make sure to leave these fields empty – you can still select SSL or alternate port settings as required.

AppleScripts

AppleScripts can be run at various times when things are happening on the phone line, as described below. AppleScripts will only run if a user is logged into the Mac at the time.

You configure the different kinds of AppleScripts to run by selecting **AppleScripts...** from the **PhoneValet** main menu. In general, you copy your script into the appropriate folder (as below) and then enable it in the AppleScripts panel.

Caller ID AppleScripts

Caller ID scripts run when calls come in with Caller ID information. 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).

For instance, PhoneValet ships with an example script that looks up the caller's number using publicly available Internet reverse-lookup services. As the call comes in, your web browser opens to show you information about the person who is calling.

Hook Status AppleScripts

Hook Status scripts run whenever you start to use the phone line (i.e. pick up a phone) and when the line goes out of use (i.e. when you hang up a call). The script's function is given information about the line that changed, and how many other lines are already on- or off-hook.

For instance, we ship an example script for iChat such that each time you start a call, PhoneValet alters your iChat 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 script 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.

We also ship an example AppleScript that mutes your iTunes music playing while you're on the phone, and starts your songs playing again once you hang up.

Recording and Voice Mail AppleScripts

Recording and Voice Mail scripts run after a call is over and a voice mail message was taken or a call recording was made. Similarly to Caller ID scripts, all the caller information about the call is provided to the script function, as well as the location and name of the sound file.

The example scripts shipped with PhoneValet will take each recording or voice mail message and add the audio file to your iTunes library, inside a play list (one for recordings and one for voice mails), which allows you to listen to them from iTunes, or to sync them onto an iPod or other music player. Note that with the current iTunes (4.6) release, 3GPP format files cannot be added to iTunes, so you must select the WAV or AAC file formats for these scripts to work.

Example Scripts

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

Example scripts shipped by Parliant are ready to run, and include complete source code, so you can examine how they work, make your own changes, and use them as the starting point for your own scripts. Look in the **/Library/Application Support/Parliant/AppleScripts** folder for the example files. Open scripts with Apple's Script Editor to view/edit the source code.

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 export names and call log information to use in other programs.

Importing Names and Numbers into the Phonebook

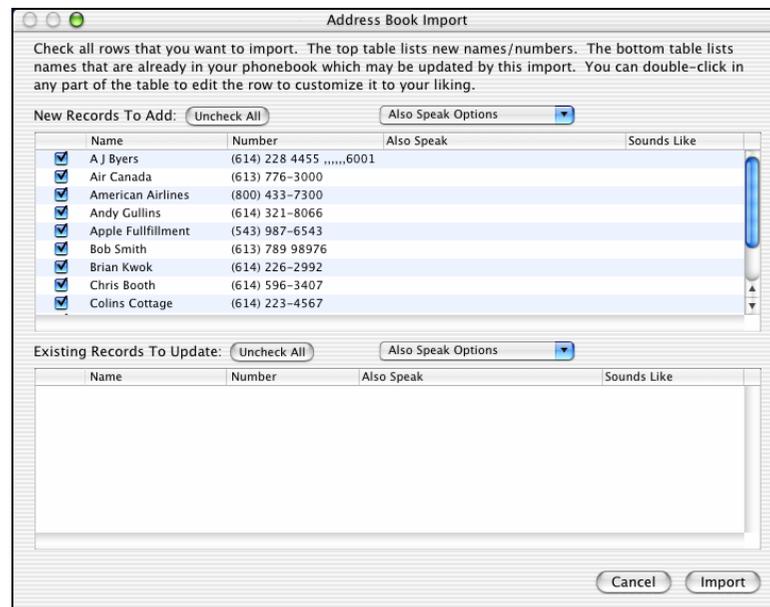
PhoneValet's import feature allows you to add existing phone listings to the phonebook from Apple's Address Book, or from comma- or tab-delimited files. This can save you from having to type names and numbers in by hand, if you've already done that in these other programs.

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!

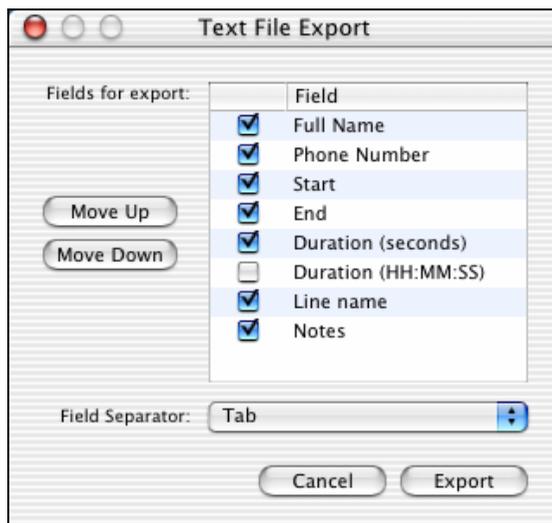
When you're done adding entries, push the **Import** button, and you will be returned to the main screen, and your new numbers will be in the phonebook.

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.

PhoneValet Anywhere

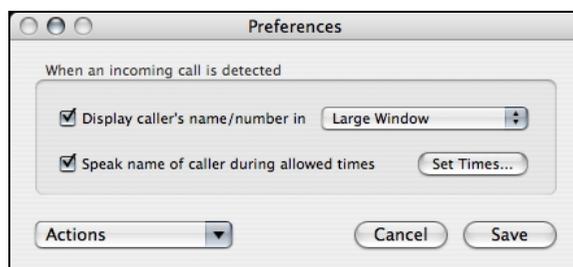
PhoneValet Anywhere is an optional extension to PhoneValet 3 that permits web access to your call log and phonebook and can send Caller ID announcements to remote Mac and Windows computers. PhoneValet Anywhere is an add-on product to PhoneValet requiring a separate license code. Visit Parliant's web site at <http://www.parliant.com/> for details.

This section of the manual covers using the features of PhoneValet Anywhere. Installation and configuration of the web users and client software is covered on page 42.

Network Caller ID Announcements

PhoneValet Anywhere can send call announcements to our Mac OS X and Windows client software, and to other clients that use the "YAC" network protocol. A web search for "yac caller id" will yield lots of information about alternate clients for other kinds of computers.

To configure the announcements on a Mac, run the configuration program called **PhoneValet Announcements**, which is stored in the /Applications folder. This will configure the announcement program to run automatically each time you log into your Mac, and lets you change the size and allowed times for spoken call announcements, as on this screen:



You can check to see if you have the latest client software by clicking on the Actions menu and selecting **Check for Updates**.

After you click **Save**, the announcement program will run in the background (no icon will appear in the Dock) and display call announcements as calls come in. Make sure your client is set to receive announcements in the server's configuration if there is any problem.

On Windows computers, the call announcement program provides Caller ID display, but not spoken announcements. Upon installation, the announcement program is set to start at boot/login time. The call announcements look like this:



You can click on the small red PhoneValet icon in the tool tray (bottom right) to view a list of recently announced calls, and to change the appearance of call announcements.

Web Access

PhoneValet Anywhere provides access to view the phonebook and call log using any standard web browser. Using the web interface, you can search, report and sort in the call log with an interface similar to the desktop software, and listen to your call recordings and voice mail messages. You can add notes to calls and phonebook entries.

To start, you need to run your web browser and connect to the server. When using Safari on a Mac, or Internet Explorer (IE) on Windows, you can use the “Bonjour” features in the browser to connect with a single click. If you use Safari, please enable Bonjour (called “Rendezvous” on Mac OS X 10.3 and earlier) on your Bookmarks bar or menu in the Safari preferences under “Bookmarks”. On Windows, enable the Bonjour feature in IE by clicking on the **View** menu, and enabling the **Bonjour** option in the Explorer Bar (requires Bonjour for Windows to be installed).

You can access the server by choosing “**PhoneValet Web Access on <machine name>**” from the Bonjour (or Rendezvous) menu.

If you are not on the same local network as the server, or you use a different web browser than Safari or IE for Windows, you will need to type a web address into your web browser, as below. Replace *phonevalet.ip.address* or *machinename.local* with the IP address or name of the computer running PhoneValet. You can find the name and/or IP address of the server computer in the **System Preferences** application under the **Sharing** section.

<http://phonevalet.ip.address/cgi-bin/phonevalet.cgi/>

<http://machinename.local/cgi-bin/phonevalet.cgi/>

Web Access Login and Navigation

Once you get to the web access screen as above, you will be prompted for your username and password. Please enter the information given to you by the person who set up the server, or go to the server Mac computer and add a username if you don’t have one.

Once you are logged in, you will see a screen as below. You can click on the tabs at the top to change to the Phonebook, Call Log, and to run reports on the Call Log.

As you can see below, there are search and sorting tools available on the left side of the main window (“**Adjust View**”), to let you change the column to sort by and the number of records you see per screen. Under that are “jump” links that let you jump forward or backward many screens at once – the links are based on your current sort column and show you around . This is especially useful for large call logs where there could be many screens of calls to show. Once you’ve moved forward and are close to calls that you’re looking for, you can use the **Previous Page** and **Next Page** links (top right and left) to move one page.

To show the details window (in the second screen below), click on the magnifying glass in the **Detail** column. If you click on the cassette/microphone icon in the **Msg** column, the details window will display, and playback of the message will start right away. If you change the notes in the detail window, click the **Save Notes** button to save your changes. These notes will be made visible to the PhoneValet desktop application as well as all web users.

New voice mail messages will be highlighted in yellow in the table. If you listen to the message, the message will be marked as heard. You can click the **mark as unheard** link in the details window, if you want the message to be highlighted for the next person looking at the list.

PhoneValet: Your Personal Telephone Assistant

http://kfordspb.local/cgi-bin/phonevalet/cgi/CallLog?offset=1

PhoneValet Message Center

Phonebook Call Log Call Report Parliant Online Log Out

Quick Search

Adjust View

Show: 15 entries

Sort By: Start

Reverse Order

Page 2 of 4

Line	Name	Number	Start	Length	Type	Note	Msg	Mailbox	Detail
B2	SEVN STYLES FAS	(614) 731-3177	10:32 AM 12-Jun-04	00:38	A				
B2	Parliant Corporation	(614) 321-9923	7:40 PM 11-Jun-04	01:20	P				
B2	SMOLKINS MENS	(614) 283-3826	9:00 AM 11-Jun-04	03:01	A				
1st	Northern Quality Inc.	(614) 342-1212	1:13 PM 07-Jun-04	01:13	M			Customer Support	
B2	On Hold Recording	(614) 321-9924	10:10 AM 05-Jun-04	01:08	P				
B2	RALPH CLINT	(614) 838-5047	10:00 AM 05-Jun-04	02:24	A				
2nd	Kevin Ford	(614) 321-9956	11:01 PM 04-Jun-04	02:37	A				
1st		(860) 873-1452	1:04 PM 04-Jun-04	00:54	M			Customer Support	
B2	Ticket Master	(614) 567-7040	12:27 PM 04-Jun-04	00:36	A				
B2	AnsweringAll Inc	(458) 321-98723	8:04 PM 03-Jun-04	01:03	P				
B2	PRIVATE NAME	(415) 777-2668	7:23 PM 03-Jun-04	00:18	A				
B2	O HEARN T	(614) 230-4197	3:06 PM 03-Jun-04	00:10	A				
B2	RIDEAU FERRY MA	(614) 267-3512	1:35 PM 03-Jun-04	02:53	A				
1st	CARCANADA	(614) 489-0743	1:14 PM 03-Jun-04	01:19	M			Customer Support	
1st	Mike Caughey	(614) 256-9574	1:37 PM 21-May-04	00:58	P				

P: Placed • A: Answered • U: Unanswered • M: Voice Mail • R: Remote Control • Unheard messages appear in yellow

PhoneValet Message Center Call Details

Name: Northern Quality Inc.

Number: (614) 342-1212

Line: Primary

Started: June 07, 2004. 01:13:42 PM

Ended: June 07, 2004. 01:14:55 PM

Duration: 01:13

Type: Call with a Voice Mail Message

Message: Audio length: 00:48

Recency: Message Heard (mark as unheard)

Notes: Everest wants new PCB layout.

Save Notes

The **Call Report** tab gives you access to run reports. The reports have exactly the same options as the report feature in the desktop application. See page 29 for info on the reporting options and how they work. When a report is being displayed in the call log, the quicksearch box (top left) is replaced with a **Displaying Call Report** section, so you know that you're looking at only a partial call log. You can cancel the report by clicking **Close** or click **Change** to change the report criteria.

Appendix A: Advanced Dial Settings

Dialing Rules

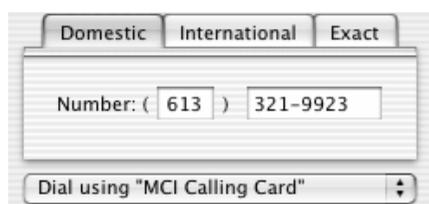
PhoneValet uses your **Local** and **Long Distance** preferences to help dial the phone. In particular, you configure PhoneValet to understand that you may need to dial certain numbers before or after a phone number in order to complete the call. In an office, you may have to dial 9 to get an outside 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 • General...**) 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 then 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 code(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 General Preferences’ **Local** tab.

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: Technical Details

Verifying that the Telephone Adapter is Functioning

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

For first-generation Telephone Adapters (blue in color), the light should be on solid red when the computer is running and the software is working. The light will slowly flash whenever a phone is off the hook, and go back to solid-on when you hang up the call.

For second-generation Telephone Adapters (grey in color), the light will be on solid green and will flicker red when the device is communicating with the computer.

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 1.1/2.0 ports, such as those which are built into your Macintosh.

If you use a USB hub (which gives you extra ports), make sure to use one which provides full-speed USB 1.1 ports and has its own power supply that plugs into a wall socket. 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.

OpenBase Database

PhoneValet includes the OpenBase 9.0 database, and uses that database to store the phonebook, call log, preferences and so on. Users do not need to interact with the database to use PhoneValet – it is completely managed by PhoneValet. OpenBase is a powerful SQL relational database.

For developers and other advanced users, Parliant's arrangement with OpenBase permits users to have read-only access to run SQL statements against our database. Parliant does not provide technical support for database access. If you are developing a vertical market product (such as a billing application that would use call log data) that would benefit from more access to our database, please contact Parliant for information at <http://www.parliant.com/contact/>.

To connect to the database, use the username **phonevalet** and the password **phonevalet**. The database is called **ParliantCTI**. Connections are possible via OpenBase's Manager software, the `openisql` command-line tool, and via many different client libraries and query tools. Visit <http://www.openbase.com/> for more information about the capabilities of OpenBase.

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.

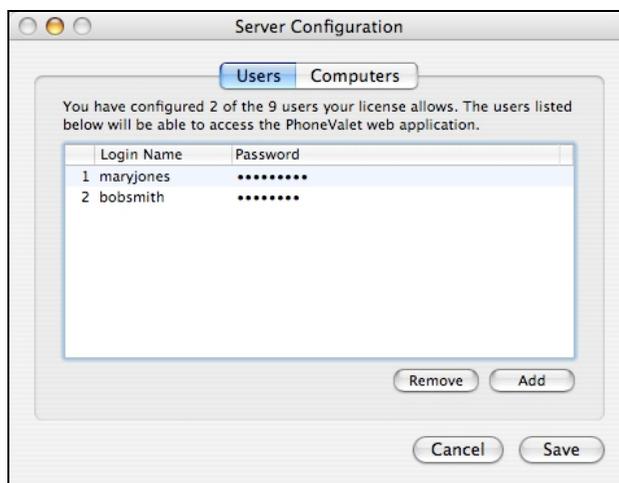
Updates and improvements will be made continuously, and are free of charge. For major revisions, or for additions of whole new feature sets, there may be an upgrade charge.

Appendix C: PhoneValet Anywhere Installation

PhoneValet Anywhere is an add-on option to PhoneValet Message Center 3 (and higher) that requires a separately purchased license. PhoneValet Anywhere is licensed on a per-user basis – the server license provides the first 2 users, and then additional users can be purchased. Each user license allows one web access user and one Caller ID client to be added.

Web Server Installation

Configuring PhoneValet Web Access is simple. First, create usernames and passwords. Select **Server Configuration...** from the main menu and click on the **Users** tab. Click the **Add** button and enter a username and password. If you need to change a password, simply double-click in the Password column and type the new password.



You also need to activate the Mac OS' built-in Personal Web Sharing feature. Run the **System Preferences** application, and click on the **Sharing** item. Under the **Services** tab, check the **Personal Web Sharing** box on. This panel also lets you view/set your computer's name – look at the top, just under the **Computer Name** field. The name below, ending in ".local" is a name you can use on Bonjour-enabled computers, in place of the IP address, to type in web addresses, for use with browsers other than Safari that don't have Bonjour web support.

If you have just entered a network license in PhoneValet for the first time, you also need to reboot to get the PhoneValet web software to start up. To save resources on your Mac, that software does not run unless a license is installed.

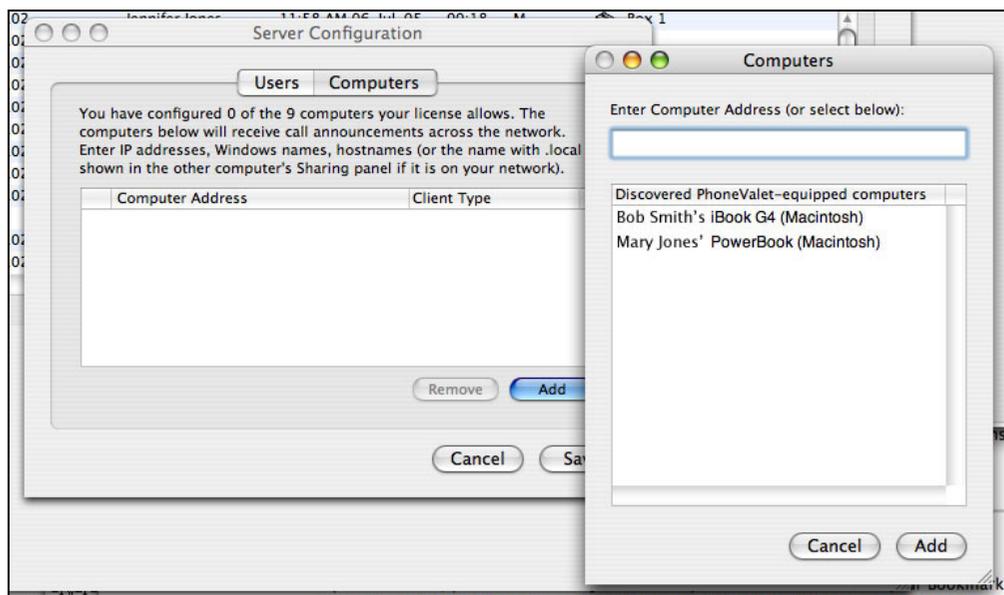
Caller ID Client Configuration

To configure the Caller ID clients on your network, start by installing and running the client software, and then go to the server and add the clients to the list.

For Windows and Mac clients, the client software installer is available on the PhoneValet software CD, in the **Extras** folder. Look under the **Network Client** folder for the installers. You can copy the files to your Mac or Windows client computers. The Mac installer is a DMG disk image – double click and run the installer. The Windows installer is a single .exe file that will install the software when run. If it is more convenient, you can download the latest client software from the Parliant support site at <http://www.parliant.com/support/phonevalet/>

For Windows 2000 and XP, Parliant also strongly recommends downloading and installing Bonjour for Windows from Apple before installing the Windows client. It will make configuring and using PhoneValet Anywhere easier. This software is available from Apple at <http://www.apple.com/support/downloads/bonjourforwindows.html>

Once one or more clients are installed and running, go to the server computer, run the PhoneValet application and pick **Server Configuration...** from the main menu. Click on the **Computers** tab and click **Add**, and you will get a panel as below. Either select a computer from the list to add (which should list all Bonjour-compatible clients), or type in a hostname (like "macmini.local" or IP address like "192.168.1.1") and click **Add**. After adding, make sure the Client Type is correct – either Mac or Windows/YAC.



You can install the client software on remote computers – i.e. on those that are at another location. In this case, they will not display in the list of computer, and you will need to enter a valid hostname or IP address. At the client site, if a firewall is installed, it may prevent the call announcement messages from getting through. You may need to open ports on the firewall to permit the call announcements to get through. For Mac clients, you need to open TCP port 47242. For Windows and other YAC protocol clients, you need to open TCP port 10629.

Appendix D: Certification and Warranty Information

Hardware Certification Information

FCC Part 15: Radiated & Conducted Emissions (USA)

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:

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

FCC Part 68 (USA)

This equipment complies with Part 68 of the FCC rules and the requirements adopted by the ACTA. On the bottom of this equipment is a label that contains, among other information, a product identifier in the format US:AAAEQ##TXXXX. If requested, this number must be provided to the telephone company.

A plug and jack used to connect this equipment to the premises wiring and telephone network must comply with the applicable FCC Part 68 rules and requirements adopted by the ACTA. A compliant telephone cord and modular plug is provided with this product. It is designed to be connected to a compatible modular jack that is also compliant. See installation instructions for details.

The REN is used to determine the number of devices that may be connected to a telephone line. Excessive RENs on a telephone line may result in the devices not ringing in response to an incoming call. In most but not all areas, the sum of RENs should not exceed five (5.0). To be certain of the number of devices that may be connected to a line, as determined by the total RENs, contact the local telephone company. PRL-VDM-II-C has a REN of 0.1B

If this equipment PRL-VDM-II-C causes harm to the telephone network, the telephone company will notify you in advance that temporary discontinuance of service may be required. But if advance notice isn't practical, the telephone company will notify the customer as soon as possible. Also, you will be advised of your right to file a complaint with the FCC if you believe it is necessary.

The telephone company may make changes in its facilities, equipment, operations or procedures that could affect the operation of the equipment. If this happens the telephone company will provide advance notice in order for you to make necessary modifications to maintain uninterrupted service.

If trouble is experienced with this equipment PRL-VDM-II-C, for repair or warranty information, please contact Parliant Corporation, by phone 613 321 9923 or web site at www.parliant.com. If the equipment is causing harm to the telephone network, the telephone company may request that you disconnect the equipment until the problem is resolved.

There are no user serviceable parts in the device.

Connection to party line service is subject to state tariffs. Contact the state public utility commission, public service commission or corporation commission for information.

If your home has specially wired alarm equipment connected to the telephone line, ensure the installation of this PRL-VDM-II-C does not disable your alarm equipment. If you have questions about what will disable alarm equipment, consult your telephone company or a qualified installer.

Industry Canada ICES-003 (Class B) – Radiated & Conducted Emissions

This Class B digital apparatus meets the requirements of the Canadian Interference-Causing Equipment Regulations ICES-003.

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. Product support is provided throughout the warranty period, and shall be conducted electronically through Parliant's website at www.parliant.com/support.

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