



PhoneValet 5.4.1 User's Guide

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Overview

PhoneValet Message Center is Parliant's business-class product that provides detailed call logging, recording and voice mail features, including the ability to build sophisticated "trees" of options for people calling in.

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 a Quick-Start guide, and the software on a CD.

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

System Requirements

PhoneValet requires at least this configuration:

- Computer that meets Apple's system requirements for MacOS X
- Mac OS X 10.3.9 or higher installed
- QuickTime 6.5.3 or higher installed
- Available USB port
- Regular (analog) phone line, with touch-tone service, near your computer.
- Mac OS Finder-compatible CD burner or "SuperDrive" for disc archiving

PhoneValet is delivered as a Universal Binary, so it runs at full performance on both PowerPC Macs, as well as all new Intel processor Macs.

Inbound call announcement/ringtones, call blocking, and inbound call logging features require Caller ID service from your local telephone provider. Call Transfer service is required on your line for the voice mail transfer feature. 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 or USB modems) along with fax software such as PageSender or the Mac OS 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 [37](#) 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 [37](#) 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 Application Alias icon on your desktop, or use the Finder to navigate to the Applications folder, and click on **PhoneValet**.

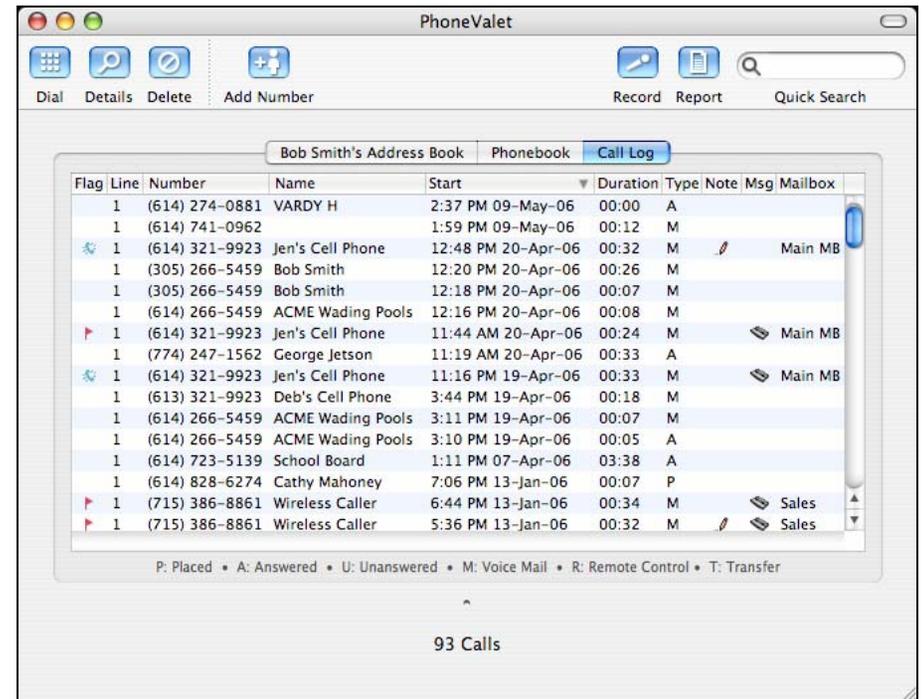
The first time you run PhoneValet, you will need to enter your license code(s) for the software, which you will find on a license card in the box. On the license screen that comes up, simply click on a line, and click the **Edit...** button. Enter your license code on the panel, and edit the line name if you want. The line name is shown on all calls in the call log, and will be read to you when a call comes in if you have more than one telephone line.

If you have ordered PhoneValet Anywhere, first enter your PhoneValet 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. (See page 39 for Anywhere installation help)

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 up more area codes in the preferences later.

The PhoneValet product includes two views of your calls. The main view gives you access to PhoneValet's phonebook and integration with Apple's Address Book, and your whole call history including all voice mails, call recordings and call details.

The second view – the **New Calls** window – is provided to give you convenient access to your recent incoming calls and voice mail messages, so you can focus on the calls you may need to respond to. 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. We'll see more about this way of viewing calls in the Voice Mail section. You can display this window by clicking the **New Calls** button in the toolbar, or by clicking on the **Window** menu.



Main Call Log Window



New Calls Window

PhoneValet Anywhere is an add-on option to PhoneValet that allows access to the phonebook, call log and call recording controls using a web browser, and also provides Caller ID announcements to other computers (Windows PCs and Macs) on your network.

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 use PhoneValet's features on all your lines. The PhoneValet product is sold by-line, and you can obtain additional lines from your local Mac retailer or the Parliant web site at <http://www.parliant.com/store>.

If you have purchased multiple Telephone Adapters, 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. 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 ...

- Using the voice mail system
- Using the phonebook
- Dialing by voice or mouse-click
- Using the call log to track your calls in and out
- Recording your calls
- Having PhoneValet announce your incoming calls
- Importing and export information
- Using Call Actions to run AppleScripts
- Remote-Controlling your computer by calling in

Voice Mail

The voice mail feature 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 create an essentially unlimited set of choices for callers to select from, including the ability to create a "tree" of options where people can choose from a menu of choices. The choices can be mailboxes to leave messages, announcement-only choices for information services, call-transfer choices or remote control script options. There is also a "page and pause" type that acts like an automated attendant – it puts the caller on hold and announces who the call is for on the computer(s). You can build a multi-level call tree by creating menus within menus – as deep as you need.

The caller will dial one or more numbers on their phone to pick a choice. Each choice can play another greeting/message to the caller and then the choice's action is taken (another menu, beep and take a message, etc...)

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 Main mailbox enabled, PhoneValet acts like a normal household answering machine -- it will play the main greeting, beep, and then take a message.

If you change the main box into a menu and make choices under that menu, 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 by pressing the appropriate number(s) on their phone. The caller can make their choice during the greeting, or during the pause.

If the caller doesn't make a choice, PhoneValet can be configured to repeat the greeting, or to assume a particular choice (such as a catch-all mailbox that you choose). If the caller does dial a choice, then PhoneValet will act on that choice – playing a given greeting or another menu, transferring the call, etc...

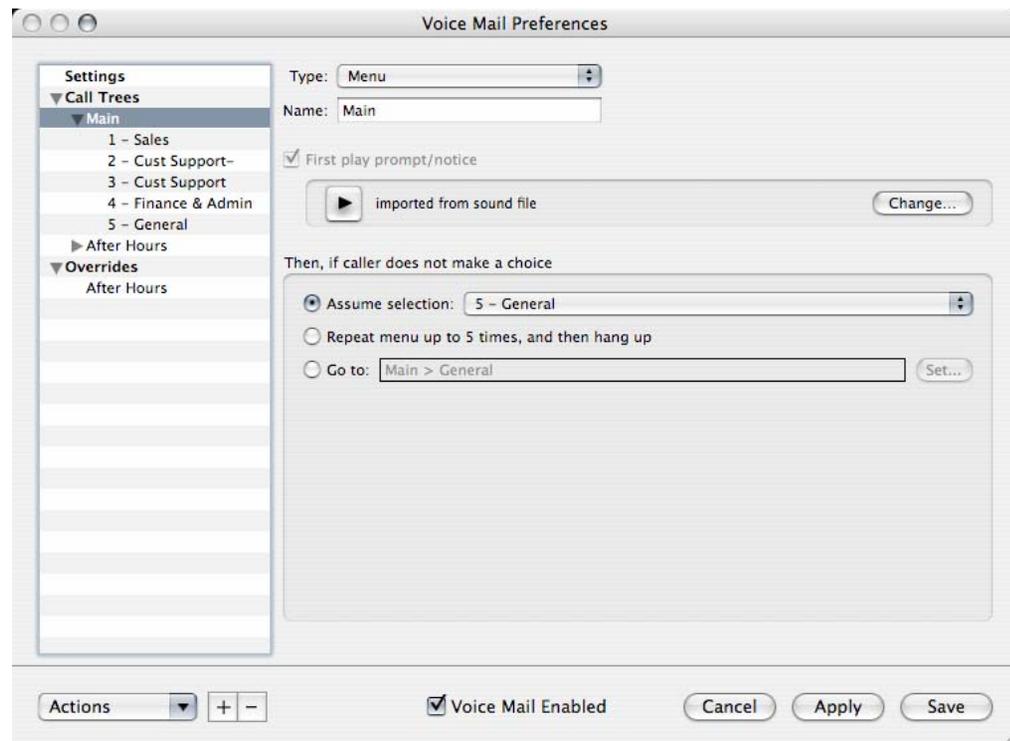
At any time during a menu/greeting, the caller can press the pound (#) button on their phone - if they do, the greeting will stop, and PhoneValet will jump to that choice's action. This lets people who know your setup avoid listening to the whole greeting. During the main greeting, you can also press the (*) button to enter remote-control mode or to call in to check messages – see the section on Remote Control on page 20 below.

Configuring Voice Mail

To configure the voice mail system, click on the **PhoneValet** menu, and select **Preferences** → **Voice Mail...** On this screen, you can enable the voice mail feature, build your call tree(s), and set basic voice mail preferences. You can also create overrides, which let you customize voice mail based on day/time or which line calls are on.

First, make sure the **Voice Mail Enabled** checkbox is checked at the bottom-center of the window. Then, click on **Settings** on the left side, where you can 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). You can also set your access code to call in for messages; the code gives you access to all messages. You can give out codes to access individual mailboxes on the mailbox-editing screen.

To start, PhoneValet provides a single mailbox called **Main** that plays a generic message and then takes a message. To change the greeting that plays when the voice mail first answers a call, click on the **Main** item at the very top of the left side. On the right side, click the Play button to hear the current greeting. To change the greeting, click the **Change...** button. See page 8 for details on setting greetings.



If you want to provide choices to your callers, change the **Type** of the **Main** item to Menu, and then you will be able to add choices under it. To add choices, click on the **Actions** menu at the bottom-left.

When adding choices, you can set the digit(s) that the caller must enter – when you click on a choice on the left side, a box appears that lets you type the digits. On the right half of the window are the settings for the selected choice – you can change the name, greeting and rules for what happens at the end of the choice. You will see details of each choice type below.

About Call Trees and Overrides

When PhoneValet answers a call, it starts the caller at the **Main** tree. When you make **Main** into a menu, it becomes the top of a call tree, and it is the default tree used when PhoneValet answers calls. A tree lets you create one or more levels of menus, where each menu contains a set of

choices for the caller to pick from. A menu can have many choices, and you can put menus under other menus to create as many levels in your tree as you need.

You can add other call trees to PhoneValet by clicking on the **Actions** pop-up menu. You would create other trees so that you could set up your voice mail to behave differently based on day and time (such as at night, on weekends, etc...), or so that you could have different voice mail configurations on different phone lines (for instance, separate menus for a home-line and business-line in a home-based office). You may also create trees to save voice mail configurations for special times of the year, such as an altered setup for holidays.

When you make a new tree, it is not immediately used by PhoneValet. To cause PhoneValet to answer some calls using an alternate tree, you create an **Override** which describes when to use a particular tree instead of the default tree. You can also send specific callers to a given tree using Caller ID – see Profiles on page [15](#) for more information.

To create an override, click on the **Actions** menu again, and select **New Override**. You can edit the override on the right side of the window – set a name for the override. Select the tree you want to answer with, and the rule for answering – either based on selected times/days, on selected lines, or a combination of both options. If desired, you can change the number of rings at which PhoneValet will answer – for instance to make it answer quickly at lunchtime or at night when no-one will be in the office.

Overrides can also be used to disable voice mail on certain lines, if you don't want PhoneValet to answer all your lines – simply make an override set to **“Do not answer”** and pick one or more lines to disable from the list. You can disable lines at certain times of day as well, if you are sure that people will be available to answer calls.

Menu Choices

A menu lets you play a prompt to the caller which describes the options available to them, and then they can pick which option they want. You

can also decide what happens if the caller doesn't make a choice – you can drop them into a given sub-choice by clicking **Assume selection** and selecting any of the choices under this menu. You can opt to repeat the greeting up to 5 times (hanging up if the caller still doesn't pick), or you can send the caller to another place in your call tree using the **Go to** option.

“Take a Message” Mailbox Choices

All messages are stored in mailboxes. You can make a mailbox for each person in an office or home, or to assign mailboxes by department for a business.

You can select whether or not you want a mailbox prompt played. This prompt will be played to the caller after they've selected the mailbox, and then PhoneValet will beep to indicate the caller can leave a message. Click the **Change...** button to set your greeting. If you don't want a greeting, that's OK – PhoneValet will just beep and start recording.

You can set the mailbox to send an email (including the message as a sound file attachment) by checking that option on, and entering one or more email addresses. The email will be sent after the caller hangs up from leaving a message. See page [28](#) for help on email settings. If you are emailing to an Apple iPhone, make sure to upgrade to iPhone software 1.1.1 or higher in order to play audio file attachments.

If you want people to be able to call in and check for messages for a mailbox, check the box, and enter the desired access code. This code will allow the caller to access only the given mailbox's messages.

Announcement Choices

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

You click the **Change...** button to set the message to play to the caller.

After the message finishes playing to the caller, 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 menu they were on. You can also send the caller to the place where voice mail started (the main greeting and menu), or send them to another place in the call tree by selecting the **Go to** option.

Transfer Choices

The transfer feature within voicemail allows the caller to be transferred to a different number upon making a choice from the main menu. This can be used to transfer a caller to a particular extension within an office environment, or to transfer a call to an outside number (e.g. your cell phone) on a regular line.

In order to use this feature you must connect your Parliant Telephone Adapter to an office telephone switch, or have a telephone line which supports Centrex (business phone) service or is subscribed to Call Transfer from your telephone provider.

Most telephone systems allow for a transfer by “flashing” the line (hanging up briefly, then picking up again), then dialing the number of the line to be transferred to, and then hanging up again. This method of transferring is often referred to as “Centrex Transfer”. This is the mechanism used by PhoneValet to transfer the call.

You may wish to set a prompt to tell the caller that they should wait to be transferred. Enter the phone or extension number *exactly as PhoneValet should dial it*. PhoneValet will flash the line before dialing these digits. In an office environment do not forget to add a 9 (or appropriate outside-line access code) if you wish to transfer the call onto the regular telephone network.

NOTE: PhoneValet's call transfers are “unsupervised”. This means that PhoneValet does not monitor the call once the transfer is initiated. In the event that a transferred call is not completed (due to no-answer or busy) the call will be handled appropriately by the telephone line provider's

equipment (the caller may hear a busy tone, or go into the voicemail provided on the number they are being transferred to). If a call cannot be completed in an office environment, your telephone switch may ring back to the Parliant Telephone Adapter that initiated the transfer in which case the caller will hear the main menu again. Once the call is transferred, PhoneValet no longer controls the call and it will be logged as finished. If equipment causes the call to ring back to PhoneValet it will be treated as a new call.

Remote Control Choices

A final choice available for callers is a remote control choice. Remote Control is a special feature of PhoneValet that allows callers to call in and run scripts using a special mode. The feature is described in detail on page [20](#). If you have set up remote control scripts, you can now make selected scripts available as choices from the main voice mail menu, so that your callers do not have to enter the special remote control mode.

To use this feature, first configure your remote control scripts using the regular remote control system. Once you have scripts working, you may create choices in the voice mail preferences to run a script. To do this, select or create a new choice, set the **Type to Remote Control** and click **Edit...** On the edit screen, select which remote control you want to run, and whether the caller should return to the menu after the script, or be hung up on. You may also set a greeting for the script, which is most convenient if your script may take a long time to run – your greeting could simply say “please wait while we process your request” or some similar message. Once the script completes, the sound file or text-to-speech will be played to the caller.

Page and Pause Choices

The Page and Pause choice type enables the building of a simple auto-attendant system. A Page and Pause choice plays a simple message to the caller, and then sends a call announcement to the computer screen indicating which choice was taken. For instance, you might tell the caller “Your call is being transferred to the sales team”, and then PhoneValet

will pop up an announcement on the computer screen to tell you that the call is for sales. If you don't answer the call within a certain amount of time, then PhoneValet can take the caller to a given mailbox to take a message. The caller hears a hold message/music that you provide during the time they are waiting.

This process gives the caller the impression that you have an expensive automated attendant system, and can allow you to let more calls go to voice mail, with the knowledge that if callers pick certain high-priority choices in your call tree, you'll have the option to take the call.

Page and Pause also works along with PhoneValet Anywhere to send page messages across your computer network to all your Caller ID client computers. This can allow you to let PhoneValet initially answer most or all of your calls, and then the page feature can let people know who the call is for. If no-one suitable to answer the call is available, the call can go to a mailbox.

When configuring a page and pause choice, you provide an initial prompt/greeting to play the caller and another hold message/song to play during the hold period. You also set the name of the person or department that you want paged. The announcement sent to the local and remote computers looks a lot like the normal Caller ID announcement, but it includes the person/dept. name you set as well as the Caller ID information. You can set the page to repeat after a set duration if you want, if the call is not answered.

You also set the amount of time the line should be held before the caller gets sent on. For instance, you may let the caller hold for up to 1 minute for a person to answer. If no-one picks up the line, PhoneValet can send the caller back to the previous menu, back to the main menu, or can send the caller to another choice – likely a mailbox that can take a message for the appropriate person/department.

Creating Shortcuts or “Extension Numbers”

When making choices, you will notice a checkbox at the bottom of the choice editing area. This lets you set a shortcut for accessing choices from the main menu, even though they are deeper down in the call tree.

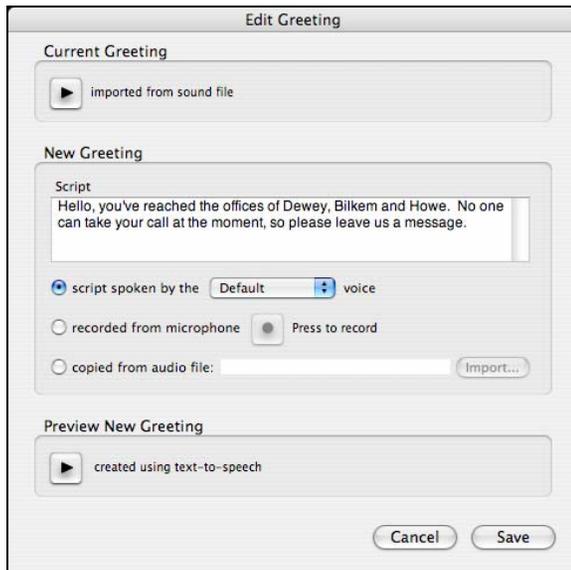
For instance, you may have a tree set up to help callers find people in your company – where people select the department they want, and then go through a list of people. If callers know who they want, it may be convenient to enter that person's shortcut number to go directly to their mailbox, as if it was their extension number. To do this, simply check the box at the bottom to allow access to choices from the main menu, and enter a number. Make sure the number does not conflict with the choices you offer at the top level of the call tree.

You may wish to set all your shortcut numbers to have a common prefix (like using 901, 902, 903, etc...), and then not using 9 for any of your main menu choices. PhoneValet will warn you if you make shortcuts that conflict with the main menu choices.

Changing Greetings

The Edit Greeting screen lets you listen to the current set greeting/prompt, and to change it. 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.

The Edit Greeting screen is used in several places in the voice mail configuration – see the sections on the different types of choices (Take a Message, Menu, etc...) for more information. In general, you will click the **Change...** button next to a greeting to display this screen.



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 – check the **Hear voicemail as it is left** checkbox, and select the audio output to use.

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.

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 with iPod devices, 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.

Parliant also offers an alternate 3GPP format which is more compatible with Treo smartphones, and an alternate AAC format optimized for iPhone. iPhone users who use PhoneValet Anywhere do not need to select the iPhone format – PhoneValet Anywhere for iPhone automatically converts audio files on-demand when played from iPhone.

The 3GPP and AAC formats require a recent version of QuickTime (6.5 or higher) or other third-party sound software to be played and can also be played on Windows PCs 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 or Windows computer with no extra software installed.

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, wait for the double-beep, and then enter your secret code, followed by the pound (#) button to enter message-check mode. You can set codes for access to all messages or for access on a per-mailbox basis, as described above.

The system will tell you how many messages you have, and you may then press 1 to hear only your new messages, 2 hear only your flagged messages, or 3 to review all your messages. Your new messages are those that are shown in bold with blue phone icon (📞) in the 'flag' column of the call log. Flagged calls have a red flag icon (🚩). 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 move to the next message (the current message will no longer be listed as new), **3** to erase this message, **4** to flag the current message. Erasing the message will preserve the call information in your call log, but the message audio file is deleted permanently – use this option with care! You can also press **pound (#)** to skip to the next message (leaving the current message as new), or press **star (*)** to return to the main menu as above. All the options (1, 2, 3, 4, #) 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.

New messages remain listed as new for the duration of the call (even if you return to the main menu or press 2 on the message), but will be

marked as normal once you hang up. If you 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 the Mac OS X built-in fax features, or by using the more feature-rich PageSender software.

Many fax machines support shared-line fax receiving, including many all-in-one printer/fax/scanner devices. 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 X 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 setup faxing, simply go into the **Voice Mail Preferences** and click on the **Settings** item on the left side. Then, check the "Notify – of incoming 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.

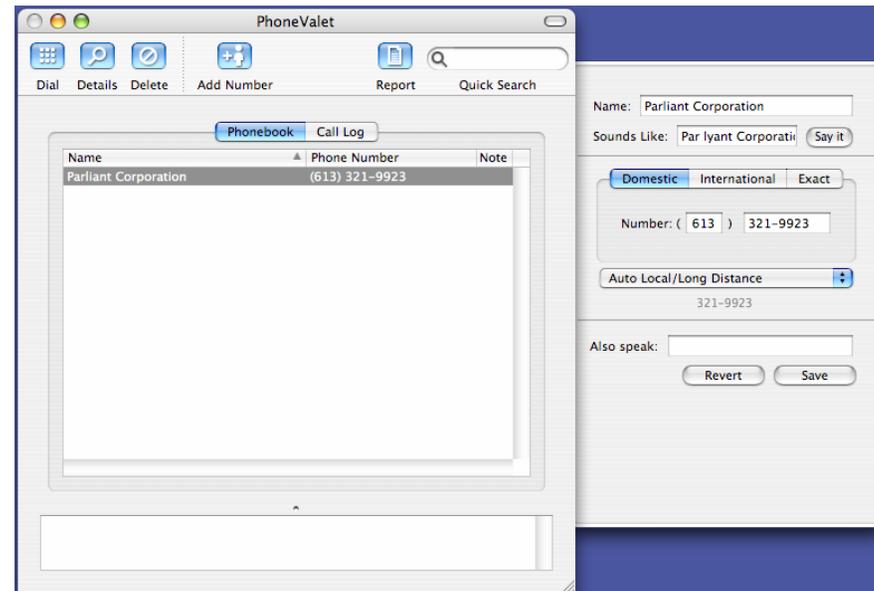
For Mac OS X faxing, open the **System Preferences** application (it's on the Apple menu, top-left), click on the **Print & Fax** section, then click on the **Faxing** tab. Make sure your fax preferences are setup as desired, and after they are make sure to un-check the **Receive faxes on this computer**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

The Phonebook

The PhoneValet *phonebook* can store the names and phone numbers of the people you talk to. Numbers should be entered into the phonebook for several 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. You can also configure custom ringtones and 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.



Address Book vs. the Phonebook

PhoneValet provides a shared Phonebook as well as Address Book support. The built-in Phonebook is provided for two reasons – for people who do not use Apple's Address Book, as well as for Macintosh computers where there are multiple users. Since the Address Book is a personal resource, the cards in a given user's address book are only available while that person is logged into the computer.

By contrast, the Phonebook is always available for PhoneValet to look up numbers in – even when no-one is logged in.

If you were not logged in during calls that may have matched names in your address book, or if you have just added a name to your address book or phonebook, you can click on the Call Log, and select **File -> Match Calls to Phonebook...** to back-fill the un-matched calls with names from your phonebook or address book.

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 you can see in the picture.

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 [37](#) 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. Long names like "*Daddy's Office*" are better than short 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

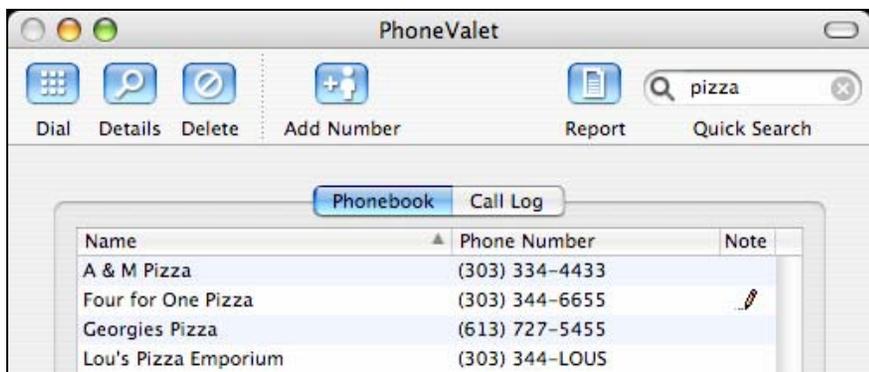
PhoneValet uses Apple's English speech recognition system, which is very capable and will know right away how to pronounce most names that you enter, and will understand you when you say them. The computer may not pronounce certain more complicated names perfectly. To hear how the computer is going to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

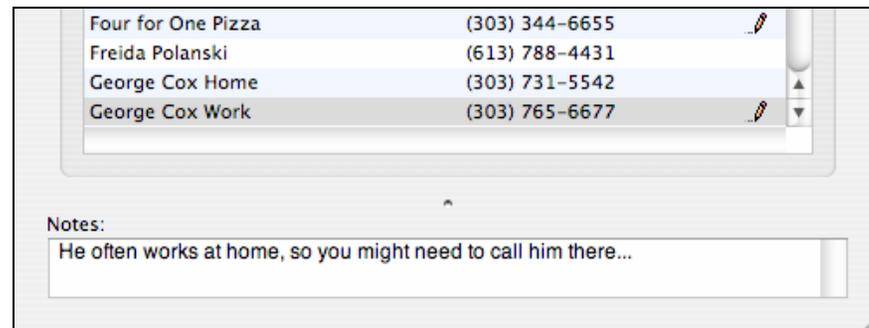


To cancel a search and return to the full list of names, simply click the (X) button at the right of the search field.

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 Phonebook Number** from the **Phonebook** menu to save it.

Address Book Integration

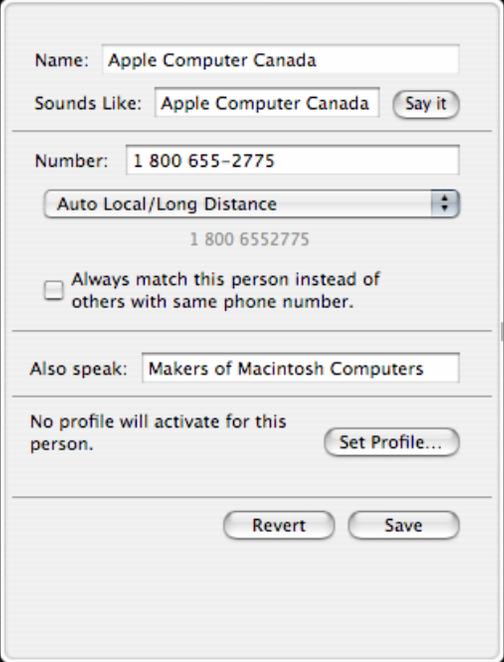
PhoneValet offers extensive integration with Apple's built-in Address Book. Just like with the Phonebook described above, PhoneValet will look up callers in Address Book for call announcements and for placing the name into the call log. You can also click on numbers to dial from within the Address Book window, or dial these names using the voice dialing feature. You can use the Address Book tab in the PhoneValet main window to customize the way to speak names of callers and to set the way in which to dial their phone numbers.

Customizing call handling with Address Book

You can customize the call announcements and dialing handling for people in your address book by using the **Address Book** tab in PhoneValet's main window. If you don't see the **Address Book** tab (would be named with your user's name – i.e. "Bob Smith's Address Book"), then you need to enable address book integration, which you can do on the **Other** tab of the PhoneValet **General** preferences panel.

You will see one entry in PhoneValet for each phone number in your address book – this allows you to customize the announcement of calls from each number separately. The names show up with the telephone labels attached – for instance, Bob Smith Work, Bob Smith Mobile, etc...

Working in the Address Book tab is very similar to the phonebook. You can search within your address book records by name/number using the **Quick Search** field, and you can sort the address book records by clicking on the column headings. When a person is selected, you will see the **Notes** area at the bottom of the window. This area shows you the same information as is displayed in the **Note** field which is at the bottom of an Address Book card. See the phonebook section above for details on these features.



The screenshot shows a window for editing a contact's details. At the top, the 'Name' field contains 'Apple Computer Canada'. Below it, the 'Sounds Like' field also contains 'Apple Computer Canada' with a 'Say it' button to its right. The 'Number' field contains '1 800 655-2775'. Below the number field is a pull-down menu set to 'Auto Local/Long Distance', with a preview of the number '1 800 6552775' displayed underneath. A checkbox labeled 'Always match this person instead of others with same phone number.' is currently unchecked. Below this is the 'Also speak:' field containing 'Makers of Macintosh Computers'. At the bottom of the main area, there is a message 'No profile will activate for this person.' with a 'Set Profile...' button. At the very bottom of the window are 'Revert' and 'Save' buttons.

If you select a person in the Address Book tab, and click the Details toolbar button to open the drawer, you can customize the way calls are dialed and announced. You can set a **Sounds Like** for the person's name, to correct the pronunciation of names that Apple's speech system doesn't handle. You can also type additional information about a person in the **Also speak** area – this information will be read out at the end of a call announcement, and can be helpful to indicate to people who the caller is. See the phonebook section above for more details.

To customize dialing, you can edit the phone number as needed, and use the pull-down beneath to control whether or not you want PhoneValet to figure out how to dial the number, or if you need to specify that a number is long distance or use a calling card. Right below the pull-down menu is a preview of how the call will be dialed.

If you have more than one card in your address book with the same phone number, you may wish to pick which person's name will be shown on calls to/from that number. To pick the person, select their name in the

table, and then in the drawer, check the **Always match this person...** checkbox. Otherwise, PhoneValet will select the first person with the given number for call announcements and logging.

At the bottom of the drawer, PhoneValet shows you if a profile is active for the given phone number. You can click the **Set Profile...** button to open the profiles panel – see page 15 for information about profiles.

Profiles: Call Blocking, Ringtones and Custom Call Handling

Based on the telephone number of a phone call, you can use Profiles to customize how your callers are handled when they call you. 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. You can also match profiles to other telephone numbers directly on the Profiles screen, for people not in your phonebook.

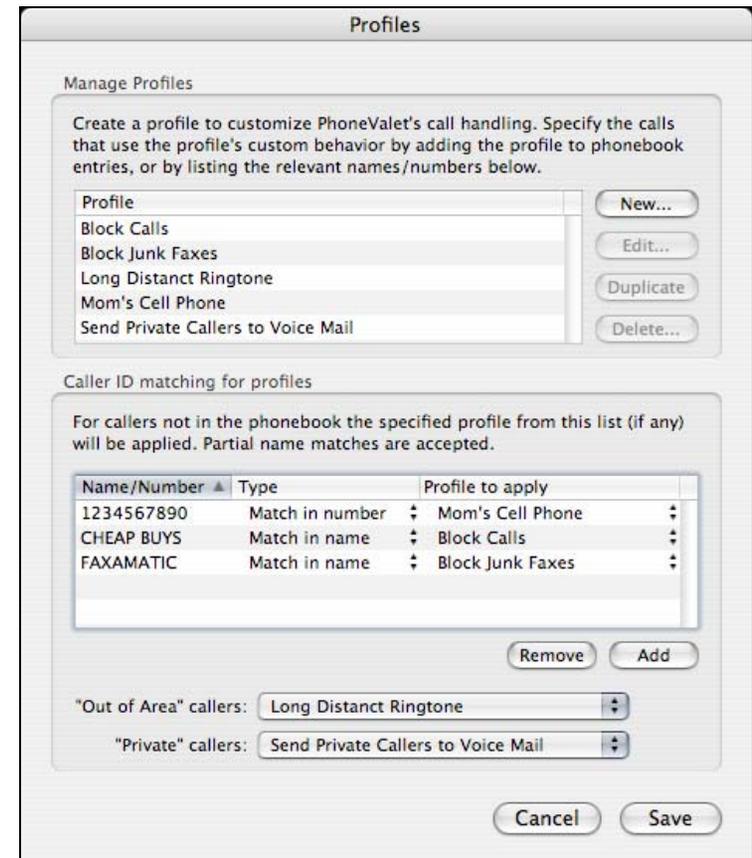
For calls where Caller ID doesn't send a number, you can assign a profile that will apply to calls that are reported as "out of area" by Caller ID. Another profile can be used to handle Caller ID "private numbers", where the caller blocked their phone number.

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
- Force call recording on or off

Creating Profiles

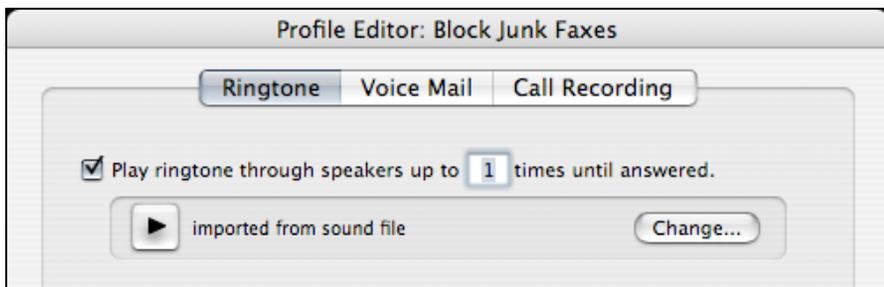
To create profiles, click on the main menu, and click on **Preferences** and then **Profiles...** From the window that comes up, you can add, edit, duplicate and delete profiles. At the bottom of the panel, you can set the profile to use for "out-of-area" and "private" callers.



In the middle is a place to type names or numbers for Caller ID matching, and the profile to go with them. Type a complete phone number and pick **Match Whole Number** or type in some or all of a name and pick **Match in Name**. You can also select **Match area code only** and type in an area code – this will match any phone number that has that area code. Name matching matches the name as sent by Caller ID, or the name of the

caller as taken from your address book card for that number. Be careful not to make names too short – they could match unintended callers – for instance, don't enter "Bob" to match "Bobs Towing", since other callers named Bob will be treated the same way! In the same way, be careful with blocking calls by area code – consider all the possible callers that could call from that area code!

If you add or edit a profile, you will see the profile editing screen with three tabs.



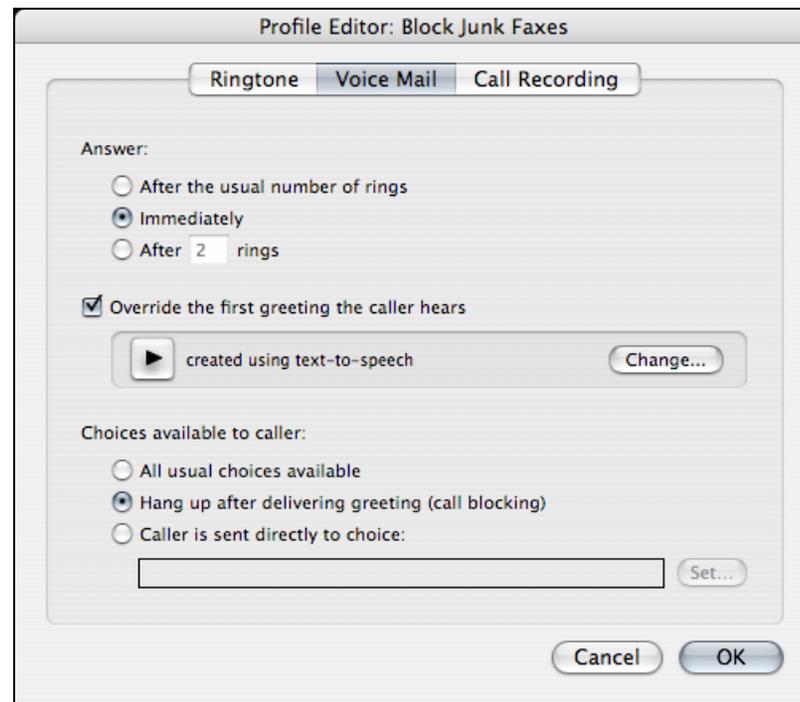
Under the **Ringtone** tab, you can specify a ringtone to be played when a call comes in – to do so, check the **Play ringtone...** box, and click the **Change...** button to set the ringtone. Similarly to the voice mail greetings setup, you can make a ringtone by selecting a sound/music file, by recording 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.

Voice Mail options are available from the second tab. Each of the options can be used separately, or in combination with each other. Here are the options and what they mean:

- **Answer**

This option adjusts when PhoneValet will answer calls for voice mail. Selecting **Immediately** 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. You can also enter a specific number of rings using the **After _ rings** options.



- **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 **Change...** 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 caller is taken to the normal starting point for voice mail. 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 place in the call tree, without playing them the normal main greeting and giving them the standard mailbox choices. You select the desired voice mail choice by clicking **Set...** and picking from the available call tree choices. The caller is taken directly to that particular choice when the call is answered – the caller can be sent to any kind of choice, including a sub-menu.

Call Recording options are available on the third tab.



The **Override automatic call recording settings...** option lets you force call recording to be on or off for calls to or from the numbers that you associate with this profile. This will override the global call recording settings. For instance, you may want to exclude your personal calls (family/friends) from being recorded on your business phone line.

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.

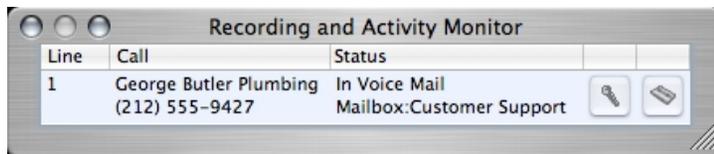
If you intend to block calls from known fax numbers and you have a shared-line fax machine, you should set a very short custom greeting to prevent a fax machine on the line from answering. These fax machines monitor the phone line listening for fax calls, and answer as needed. In some cases, these fax 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.

Calls can be recorded manually, or automatically. Manual recording involves clicking in the PhoneValet user interface to start recording only for specific calls. Automatic recording involves PhoneValet starting and stopping recording automatically each time you place or answer a call.

Manual Recording

To initiate recording, display the **Activity Monitor** as described 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.

Automatic Recording

Automatic recording leverages PhoneValet's ability to track the start and end of your calls. PhoneValet can start and stop call recording automatically without you needing to be near the computer. This option is enabled in the General Preferences, under the **Recordings** section; you can enable automatic recording for placed calls, answered calls, or both.

For placed calls, PhoneValet will start recording 5 seconds after you finish dialing the number for the call. This delay is to ensure that PhoneValet doesn't miss any of the digits you are dialing – so that your call log has an accurate record of the number you're calling. Recording will stop as soon as you hang up the call.

For answered calls, recording will start as soon as PhoneValet detects that you have picked up the phone to answer. Again, recording will stop when you hang up.

If you want to stop recording during the call, you can still do that as you could with manual call recording (see the previous section). The **Activity Monitor** window will show you that your calls are being recorded, even if the recording was started automatically. As described above, you can click the stop and restart buttons to control recording.

Call Waiting

While recording calls, you should not take calls that come in by call waiting service. Call waiting works by playing a tone into the phone when a second call comes in. You then "flash" the line (flash means briefly hanging up and then picking up the phone again) to take the second call, and the first call remains "on hold". Many phones have a "flash" or "link" button that switches calls for you, and this button performs a line flash for you.

When taking a call waiting call you are essentially hanging up on the first call and starting the second. Because of this hanging up and picking up, PhoneValet will believe that you are ending the call when switching calls, and will stop recording and mark the call as ended in the call log.

If you want to take the second call (even though recording will stop), the flash/link button will likely not actually work the first time you press it, since PhoneValet is on the line with you recording the call. By flashing, you will end the call in the log and stop recording. After that, wait a couple of seconds and do a flash again, and this time it will switch calls for you. At that point, PhoneValet will not record the call, but you are free to switch back and forth between the callers. Alternately, you can click on the stop-recording button if you are at the computer, wait a couple of seconds, and then flash the line to switch calls.

If you are going to record important calls, or you don't want the call waiting beep sounds in your recordings, you may want to disable call waiting. With most phone companies, there is usually a star code that you can dial before placing a call (often *70; check with your phone company) – this will prevent call waiting during that one call.

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.

Remote Control is also the method to call in to check messages. If you have set access codes in the voice mail preferences for access to all messages or for specific mailboxes, you can enter them as above.

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. This script only works with some ZIP codes based on the services provided by the NWS – if your ZIP code doesn't work, try another ZIP code near your location.

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 or Address Book, 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. If you have enabled Address Book integration, then you can also speak names from your Address Book. After speaking, 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. 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 to allow you to dial phone numbers directly from within the Address Book application.

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 123-456-7890 for long-distance dialing rules and then dial it.

```
tell application "ValetDialer.service"
    dial number "123-456-7890"
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. Another script (**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.

There are many keystrokes that allow you to navigate the calls and play/pause messages using only the keyboard for fast access. Look on the Call menu to see a list of actions and their key equivalents.

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 **Phonebook** 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)
- T Incoming call that was transferred

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.

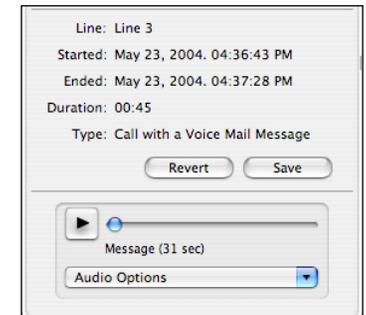
The **Msg** column shows an icon when that call has a voice mail message (a cassette tape icon) or a call recording (a microphone icon). For voice mails the Mailbox column shows the mailbox that the message was left in.

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.

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**. Deleting a recording moves the audio file to your trash, as a precaution – the file is completely deleted when you empty your trash. 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.



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.

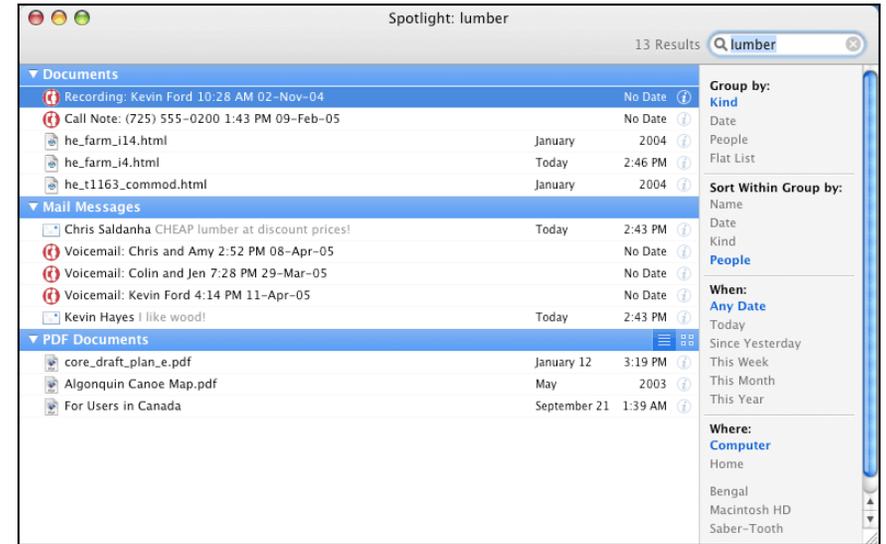


You can also sort the list by name, number, time, etc... by clicking on the column titles of the table. If you want to reverse the sorting, simply click on the same title a second time. Normally, the log is sorted by date and time with the most recent calls at the top.

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.

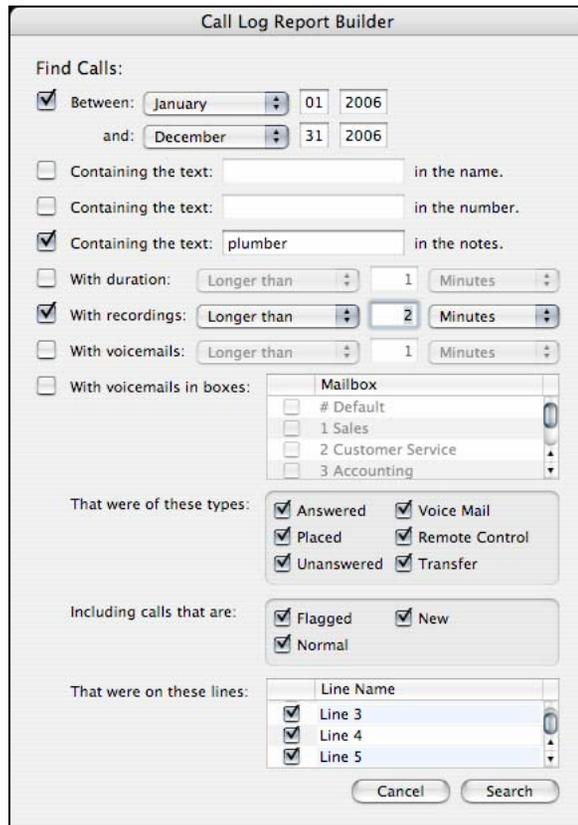


In the PhoneValet General Preferences, under the **Other** tab, you can opt to enable Spotlight indexing. By default, indexing is on in Mac OS X 10.4, and indexes “interesting” calls – voice mail messages, recorded calls and calls with notes. A second option called **Include all calls** will cause Spotlight 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.

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 the image that follows...



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.

Manage Important Calls: The New Calls Window

The New Calls window shows you a compact view of your most interesting calls – those that are new, flagged, or have occurred recently. This list includes only incoming calls. It is intended to be an easy to use way to focus on the calls that you haven't responded to or that require follow-up later. To show the New Calls window, click on that option on the **Window** menu.



Using an interface reminiscent of a standard answering machine or Caller ID box, the New Calls window lets you review your latest calls. The round navigation controls on the left side let you navigate up and down in the list of calls. The most recent calls are at the top of the list, and you can click the down and up arrows to review your new calls. You can click the play button in the center to play/pause the message for the displayed call, and you can use the left/right arrows to skip forward or backward in the audio as it plays. Each click of a left or right arrow moves you 5 seconds forward or backward in the audio.

If you open up the call list, by clicking on the **Call List** button, you can view the list of calls for easy access. This also displays some simple sort and search controls. You can opt to show certain calls – just new and/or flagged calls, or recent calls from the last week or month. You can also filter the list by mailbox, or type a name/number in the search box. As you type, the list of calls will shrink to only those calls that match.

The New Calls window has many keyboard navigation elements to make access to your messages easy – you can use the space bar to start/pause message playing, the up/down arrow keys to move through the list of calls, and the right/left arrows to move 5 seconds back/forward in the playing message. Look on the Calls menu for the keyboard shortcuts for other options – almost every navigation action has a key equivalent.

When you have one or more calls selected, you can click the **New** and **Flag** buttons to change the calls. If you want the call to no longer be new or flagged, simply click the highlighted button, and the call will change to a 'normal' call. You can also click **Return Call** to call back the number for the selected call, or click **Email Message** to email the call details and message. If the selected call was from a number listed in your phonebook or Apple's Address Book, the right-most button will change to read **Phonebook** or **Address Book** as appropriate. Clicking this button will open the main PhoneValet window and highlight the caller's number in the list. This button is disabled if the caller's number did not match.

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 [23](#) 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. The same program that performs call announcements also displays pages generated by the page-and-pause voice mail feature.

PhoneValet Anywhere extends call announcements and pages to computers around your network. See page [32](#) for details.

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.

If you are emailing to an Apple iPhone, make sure to upgrade to iPhone software 1.1.1 or higher in order to play audio file attachments.

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 clicking on the **PhoneValet** main menu and selecting **Preferences -> AppleScripts....**

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. Not all iPods and iPhone devices can play 3GPP files, so you should select the WAV or AAC file formats for iPod compatibility.

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.

Disc Archiving

PhoneValet includes a feature to archive ("burn") calls and audio (messages/recordings) to recordable CDs and/or DVDs. Disc burning can be used to create a backup record of your calls and audio, or to make a disc for presentation to clients (for instance, as part of client billing or for delivery of phone interviews).

PhoneValet creates an index on each disc that contains full call log information for each call on that disc. The index is written in HTML format and can be read using any web browser on Mac or Windows computers. The index includes clickable links to the audio files, which makes locating and playing audio a snap. (For a picture of this index, see the PhoneValet Anywhere pictures on page 33 which have a similar display format.) On Windows, QuickTime is required to listen to audio files from within the web browser (QuickTime is already included on all Macs.)

You can burn selected calls to disc (by selecting calls with the mouse/keyboard), the results of a call report (see page 25 for report info), or the whole call log. If you burn a lot of calls (especially if you have long recordings), PhoneValet will automatically burn multiple discs as needed to fit all the calls; it will warn you in advance if multiple discs are required.

You can also opt to move the audio files from your computer onto the disc. If you move the audio (instead of making a copy), then PhoneValet will delete the audio files from your computer's hard disk, but the call information will remain in the call log. If you click on one of these calls in the call log, the details drawer will display a message indicating what disc (by name) the audio is stored on. If you insert that disc, PhoneValet will find the audio and the playing controls will appear automatically.

Disc burning can also be used to create discs for presentation to clients. To help make the discs, PhoneValet lets you add extra files of your own to the disc – such as reports or other documents you want to send. In this way, you only need to make a single disc. You can add as many files and folders to the disc as you want.

Starting a Disc Burn

To make a disc, click on the **Call Log**. If you want to burn a specific set of calls, run a report (see page 25), or use the mouse/keyboard to highlight the calls you want. To start a disc burn, click on the **File -> Burn <XX> Calls to Disc** sub-menu. The menu item is customized to show you the number of calls that you have selected (or all calls if none are selected).

Then, a disc options panel will appear. On this panel, you can set the name of the disc, decide if you want to copy or move the audio (as discussed above), and add any extra files or folders to the disc as needed. After setting your options as desired, click **OK**. You will then be prompted with the standard Mac OS disc burning panel, which asks you to insert a writable disc. You can show the burn options by clicking the downwards-facing triangle on the top-right. Insert a blank (or re-writable) disc, and click **Burn** after setting your options. Parliant strongly recommends enabling the **Verify burned data** option, which takes longer but ensures the disc was burned correctly.

At this point, you will see a small panel with a progress meter that will show you the progress of the burn. You can continue to work in the PhoneValet application at this point – but you will not be able to quit the application or delete calls/audio until the burn is done or cancelled. If more than one disc is required to fit the calls, PhoneValet will prompt you and tell you how many discs are required.

If multiple discs are required, you should use only discs of the same capacity as the first disc you inserted. Note that recordable CDs come in different sizes – varying between 600MB and 700MB – make sure you use only discs that store at least as much as the first disc you insert. PhoneValet supports any disc burners and CD or DVD recordable disc formats that your Mac OS supports for the Finder's disc burning feature.

How to Use an Archived Disc

To use an archived disc, simply insert it into any computer. Open the file "index.html" with any web browser and you will be able to browse the calls that were burned to disc. If you have the QuickTime player installed, you can click on the details for each call and use the QuickTime player in the browser to listen to the audio. The web site put onto the disc is very similar to the web site produced by PhoneValet Anywhere, except that the search and sort features are not available. See page [Error! Bookmark not defined.](#) for information about how to navigate the web site.

The audio files on the disc are stored in their original format (3GPP, AAC, or WAV based on your PhoneValet preferences) and are stored in the CallLogAudio folder on the disc. The files are sorted into folders based on the date, for easy access, in case you want to work with the audio files in a separate program. If you burned extra files/folders of your own onto the disc, those files/folders will appear at the top level folder of the disc.

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.

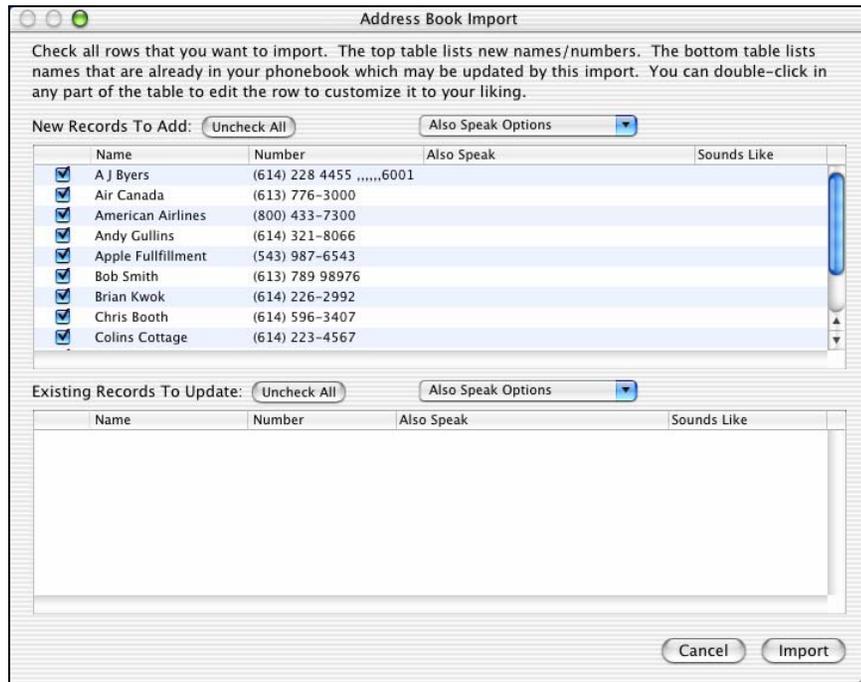
Parliant has tested the file import to work with the programs below, although exports from many other programs may work. Future updates of PhoneValet will enable imports from other programs. Please visit our support website at <http://www.phonevalet.com/support/> for updated information, and for help 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 from the menu the **File -> Import to Phonebook -> from Address Book** item. 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 the **File -> Import to Phonebook -> from File** item.

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 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 **File -> Export <X> Calls to File** from the menu (the title changes to “Phonebook Numbers” if you're in the phonebook). 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 click on the **File** menu – the title of the export menu item will change to reflect the selected number of rows.



On the panel that comes up (see above), pick the file type you want (comma- or tab-delimited), and which fields you wish to export (simply uncheck 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

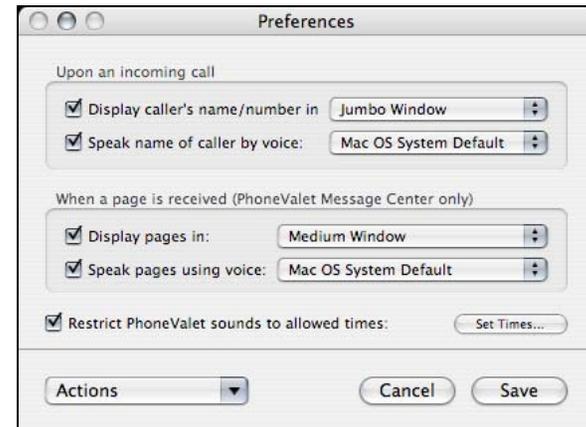
PhoneValet Anywhere is an optional extension to PhoneValet that permits web access to your call log and phonebook and can send Caller ID announcements to remote Mac and Windows computers. PhoneValet Anywhere is an add-on product to PhoneValet requiring a separate license code. Visit Parliant's web site 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 [39](#).

Network Caller ID Announcements

PhoneValet Anywhere can send call announcements and pages (from page-and-pause voice mail choices) to Mac OS X and Windows clients, and to other client software that uses the "YAC" network protocol. A web search for "yac caller id" will yield 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 and page-and-pause display, but cannot speak 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's web access allows you to access PhoneValet's data over a web browser. Access comes in two formats – a *desktop* web interface provides access to calls with advanced search and extra features, and an *iPhone* interface that provides access to recent calls and messages using a simple and elegant interface optimized for the screen size and controls of the iPhone and iPod touch.

PhoneValet Anywhere desktop mode provides access to view the phonebook and call log using any standard web browser, as well as watch the current status of your phone lines and start/stop call recording. Using the desktop 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.

PhoneValet Anywhere iPhone mode provides a streamlined interface similar to the New Calls window in the PhoneValet application. It allows you to view new/flagged calls, or the last 7 or 30 days of incoming calls. You can listen to messages and view the details of calls, flag calls, and write notes on calls. The interface is optimized for the iPhone and iPod touch screen size and multi-touch interface.

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 Anywhere 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/>

If you are less concerned about security, you can type your username and password in the web address. You can write the URL in this form and bookmark the link to avoid having to log in:

<http://ip.address/cgi-bin/phonevalet.cgi/?username=youruser&password=yourpassword>

Desktop Browser 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 or Call Log, to run reports on the Call Log, or to display the Activity Monitor window.

the **Previous Page** and **Next Page** links (top right and left) to move one page.

To show the details window for a call, 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.

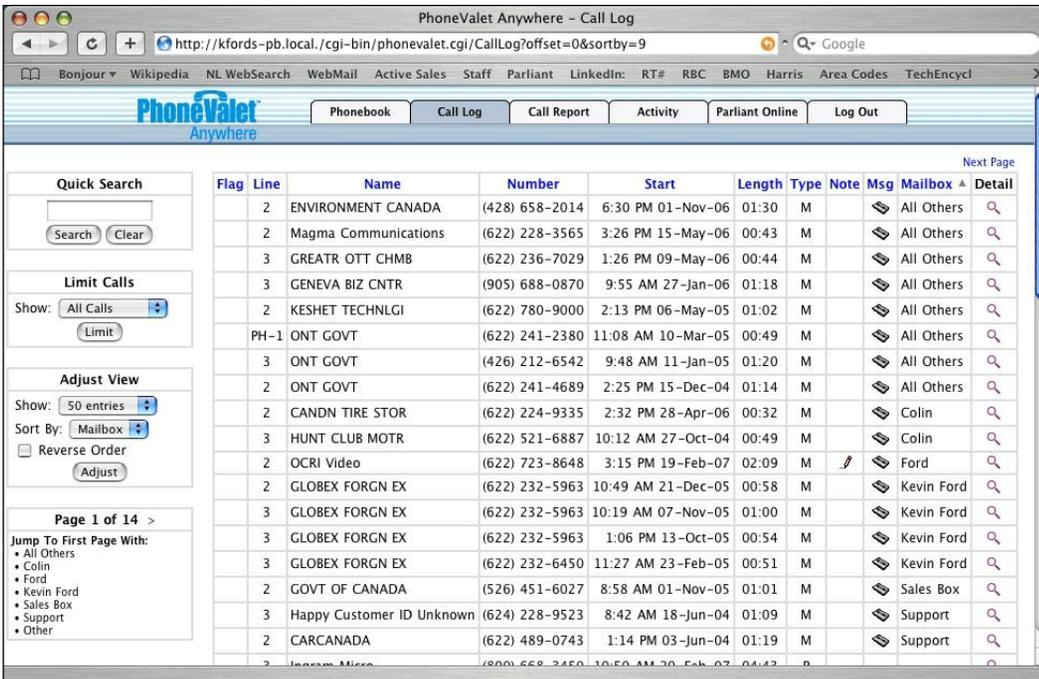
New calls will be highlighted in yellow in the table. If you listen to the message, the call will be marked as normal (if your preferences are set this way). You can click the **Mark as:** links in the details window, to change the call between Normal, New or Flagged status.

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 25 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.

The Activity Monitor is accessible by clicking on the **Activity** tab. This opens a small window that shows you the current status of all your PhoneValet lines – you can see what calls are in progress, and start/stop call recording. This window automatically refreshes its display every few seconds, and you can click the **Refresh Display** link to do that at any time. If you opt to close the larger main PhoneValet Anywhere browser window, you can bring it back at any time by clicking the **Re-Open main window** link – your session is kept open by the smaller Activity window.

If you leave your browser displaying a call log or phonebook view, the page will refresh automatically every few minutes, which will keep you signed in.



As you can see on the screen, there are search and sorting tools available on the left side of the main window, to let you search, filter and change the column to sort by and the number of records you see per screen. **Quick Search** lets you filter your list of calls to match a name or number you enter. **Limit Calls** allows you to show only new, flagged or recent calls. **Adjust View** allows you to control the sorting and number of rows per page.

Under those options 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

iPhone Browser Navigation

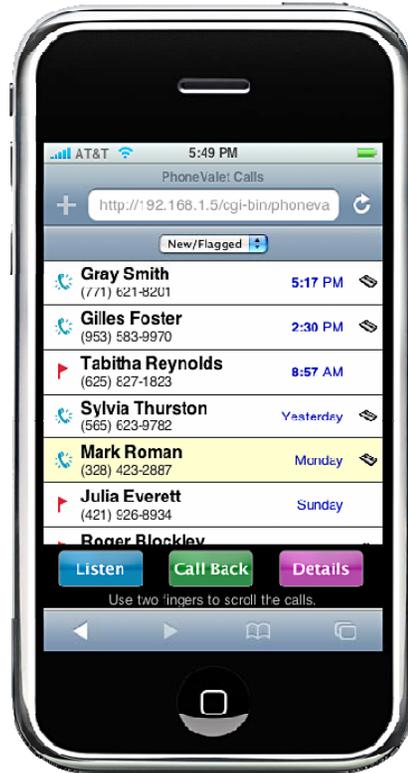
When you access PhoneValet Anywhere using the iPhone's web browser, you are given a special view of your calls suited to the screen and interface of the iPhone. This view is designed to be similar to the iPhone's built-in voicemail feature.

This web access is also supported on the iPod touch, which features the same Safari web browser as the iPhone.

In iPhone mode, you can review your recent calls – either all new/flagged calls, the last 7 days or last 30 days of incoming calls. You can change what's in the list by clicking on the pop-up menu at the top.

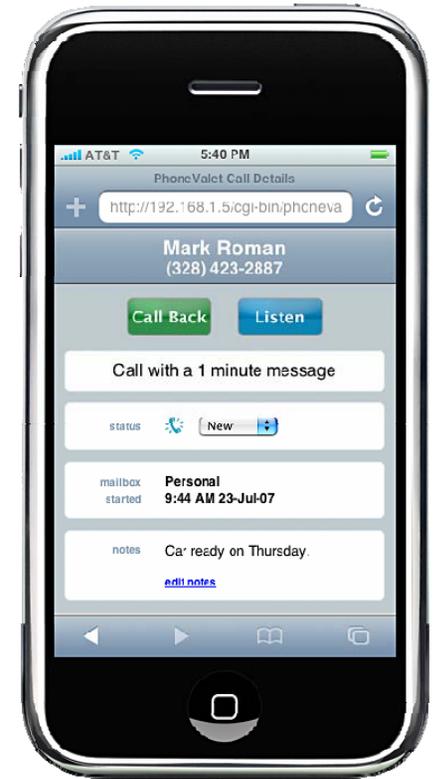
You can scroll the list by holding **two fingers** down in the list of calls and dragging up and down. To select a call, just tap on the name/number area. When you do, the buttons at the bottom light up as appropriate and the call is highlighted in yellow. You can click **Listen** to hear the message for the call, click **Call Back** to place a call to that caller's number (not available on iPod touch), or click **Details** to go to the call details screen.

If you click on the left side of a call's row (to the left of the name/number), you can toggle the calls from normal (no image) to "new" (📞) or to flagged (🚩).



If you click the **Details** button, you can view the details of a call, including the full time and date of the call. You can change the call status from this screen by clicking the pop-up menu in the center. You can also view and edit notes for the call; you may need to scroll down by dragging one finger downwards on the screen to read all the notes if they are long. If you tap **edit notes** (or **add notes**), the notes area becomes editable, and the on-screen keyboard will appear for you to type notes. After editing notes, click the **Save Notes** button below the notes area to save your changes to PhoneValet's call log.

The **Listen** button takes you to the iPhone media player so that you can listen to the voicemail message for the call. After you've listened to the message, click the Back button (bottom-left of the screen, triangle pointing left) to return to the Details screen. You use the same Back button to return to the list of calls as well.



iPhone audio formats

The iPhone does not support all the audio formats that PhoneValet can use. PhoneValet Anywhere for iPhone will automatically convert audio files when downloaded to the iPhone's media player into a compatible format. The AAC format used has reasonable quality, and is small enough that it should download at reasonable speed on the EDGE network. As the iPhone's software is upgraded, more audio formats may be supported.

Appendix A: Advanced Dial Settings

Dialing Rules

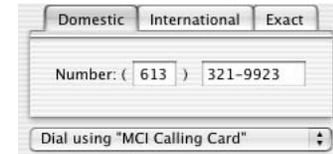
PhoneValet uses your **Local** and **Long Distance** preferences to help dial the phone. In particular, you configure PhoneValet to understand that you may need to dial certain numbers before or after a phone number in order to complete the call. In an office, you may have to dial 9 to get an outside 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 the dial your PIN 12345678.

10-digit and 11-digit Dialing

When configured for 10/11-digit dialing, PhoneValet will dial all 10/11 digits for local calls in the specified area codes(s). When entering domestic numbers, PhoneValet will automatically add your local area code. Just make sure to enter all of your city's area codes into the 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 when the software is connected to the device and will flicker red when the device is communicating with the computer. If the light is off, check the connections, and make sure that you are connected to a full-power USB port. Try connecting the device directly to your Mac's built-in USB ports if not already connected there.

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 or 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 or 2.0 ports and has its own power supply that plugs into a wall socket. You may have USB ports on your keyboard or screen - these are almost always low-power ports intended only for devices like keyboards or mice, and may not work with PhoneValet.

Backup and Restore

PhoneValet stores your calls, phonebook and settings in a database, as described below. The PhoneValet application includes a backup and restore feature that lets you make a single-file backup of your data for safe-keeping. This backup can also be used to copy your data from one Mac to another.

PhoneValet makes automatic backups every 24 hours and stores these files in the **/Library/Application Support/Parliant/Backups** folder. The software automatically keeps the last 5 backups in that location. You can also manually make a backup at any time by clicking on **File -> Backup PhoneValet** in the menu. If you back up your computer to disk, tape, DVD, or other media, make sure to include the above Backups folder in your backup profile, as well as your messages and greetings that are stored in **/Library/Application Support/Parliant/Messages**, and also any AppleScripts you may have written. Your messages and greetings are not included in the database backup file.

If you need to restore, simply copy back the Messages folder from your backup to the location as above, and then restore your database from the application by selecting **File -> Revert to PhoneValet Backup**. This will erase your current data and replace it with the contents of the backup. More help with backups is available on Parliant's support web site.

OpenBase Database

PhoneValet includes the OpenBase 10 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 using your web browser.

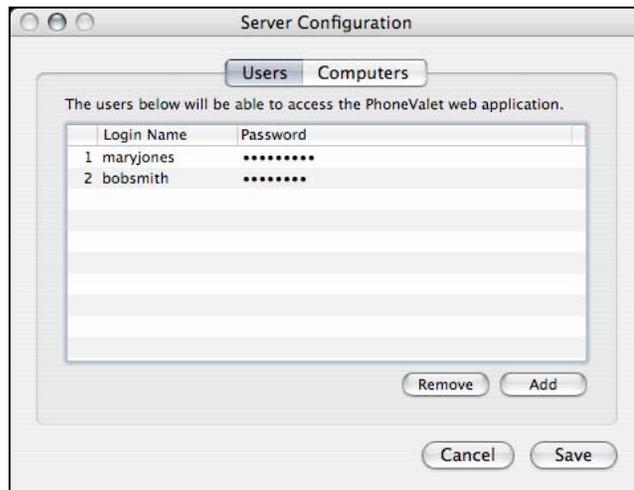
Updates and improvements will be made continuously, and are free of charge. For major revisions, or for additions of whole new feature sets, there may be an upgrade charge.

Appendix C: PhoneValet Anywhere Installation

PhoneValet Anywhere is an add-on option to PhoneValet Message Center that requires a separately purchased license that provides unlimited users and Caller ID clients as part of a single server license. More detailed setup help for PhoneValet Anywhere is available from Parliant's web site at <http://www.parliant.com/support/phonevalet/>

Web Server Installation

Configuring PhoneValet Web Access is simple. First, create usernames and passwords. Select **Anywhere 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 want to access PhoneValet's web features from outside your local network, including remote access using an iPhone or iPod touch, you may need to configure your firewall/router to allow this. Tips for advanced setups are available on Parliant's web site at:

<http://www.parliant.com/support/phonevalet/>

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 higher, 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/macosx/features/bonjour/>

Once one or more clients are installed and running, go to the server computer, run the PhoneValet application and pick **Anywhere 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**. For Windows clients, you may also type the Windows

computer-name for the client, as set in the Windows network settings. 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 4681. 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:AAEQ##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.

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

THIS WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS, AND YOU MAY ALSO HAVE OTHER RIGHTS WHICH VARY FROM COUNTRY/STATE TO COUNTRY/STATE. SOME COUNTRIES/STATES DO NOT ALLOW THE EXCLUSION OF IMPLIED CONDITIONS AND WARRANTIES, SO THE ABOVE EXCLUSION MAY NOT APPLY TO YOU. PARLIANT DISCLAIMS ALL CONDITIONS AND WARRANTIES OF ANY KIND IF THE SOFTWARE HAS BEEN CUSTOMIZED, REPACKAGED OR ALTERED IN ANY WAY BY YOU OR ANY OTHER PARTY.

EXCLUSIVE REMEDY AND LIMITATION OF LIABILITY

THE SOLE AND EXCLUSIVE REMEDY FOR ANY BREACH OF THE LIMITED WARRANTY SET FORTH ABOVE WILL BE, AT PARLIANT'S OPTION, (a) RETURN OF THE PURCHASE PRICE OR (b) REPLACEMENT OF THE DEFECTIVE SOFTWARE. IN NO EVENT WILL PARLIANT OR ITS SUPPLIERS BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES OR FOR ANY LOST PROFITS, LOST SAVINGS, LOST REVENUES OR LOST DATA ARISING FROM OR RELATING TO THE SOFTWARE, ITS USE OR INABILITY OF USE. IN NO EVENT WILL PARLIANT 'S OR ANY OF ITS SUPPLIERS' LIABILITY OR DAMAGES TO YOU OR ANY OTHER PARTY EVER EXCEED THE AMOUNT PAID BY YOU TO USE THE SOFTWARE, REGARDLESS OF THE FORM OF THE CLAIM (WHETHER IN CONTRACT, TORT OR OTHERWISE). SOME COUNTRIES/STATES DO NOT ALLOW THE LIMITATION OR EXCLUSION OF LIABILITY FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES, SO THE ABOVE LIMITATION MAY NOT APPLY TO YOU.

LIMITED WARRANTY: Hardware

1. Customer Obligations:

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

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

2. Limited Warranties And Conditions Of Sale:

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

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

3. Repairs And Service:

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

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

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

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

4. Limitation Of Liability:

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

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

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Document Revision: PV-541-20080617