

PhoneTools[®]

User's Guide

Fax

Speakerphone

Answering Machine



Installing PhoneTools - The Status Bar



INSTALLING PHONETOOLS

Starting Setup:

1. Start Windows® (if it's not already running),
2. Insert the CD provided in the CD-ROM Drive; Setup Wizard starts automatically.

If Setup Wizard doesn't start:

1. Double-click the My Computer icon,
2. Double-click the icon for your CD-ROM drive,
3. Double-click SETUP.EXE

From that point on, a program assistant will guide you through the different steps required to install PhoneTools. During this process, if you choose to enable the Find Modem option, make sure the modem is installed, connected and turned on.

Attention


Some of the function's described in this User's Guide might not be available within PhoneTools. In this case, these functions are either grayed-out or not displayed.

Screen Shots

The screen shots in this manual correspond to the use of PhoneTools in a Windows® 95 or Windows® 98 environment. When running the application in other Windows® operating systems, the aspect of the screens may significantly change. This will not impair the software's functionality.

USING PHONETOOLS' STATUS BAR

The **Status Bar** gives access to all the functions featured in PhoneTools. You may select a menu option through the **Menu** button.


The "LCD" screen displays information which you can get acquainted with at a glance. Click on the buttons  to select the type of information to be displayed:

- The **All** and **New** selections indicate the number of received documents. To view new received documents click **Inbox** to directly access the window that displays the **Inbox** folder contents.
- **Info** displays warning messages and modem status.

Click to connect you to the PhoneTools Upgrade web site.



Displays all PhoneTools' menus.

Brings up the list of received documents.

 (flashing) - Indicates the presence of new documents in the **Inbox** folder.

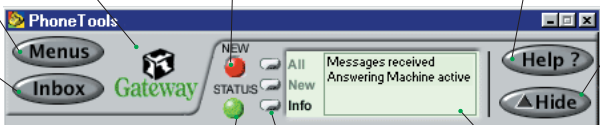
PhoneTools has a context sensitive on-line help that can be accessed by clicking the Help button or the F1 key. All the information needed on how to use PhoneTools can be found in the help files.

Displays or hides the communication module. One module can be displayed at a time.

Indicates the modem status:
 - ready to operate,
 - initializing, modem is not ready.

Select the type of information to display by clicking the appropriate button.

LCD screen.





Dialer: allows you to enter the number to call.

Click here to activate the **SpeakerPhone** feature.



Displays call progress information when dialing and Last Calls list when idle.

Several features are displayed dynamically depending on context and on the modem's capabilities. To select one of these functions, click the button located beneath the icon. A green light (LED) indicates the function is currently enabled and its corresponding icon is displayed in the right-hand corner of the LCD screen.

MAKING A PHONE CALL

Different methods allow you to specify the number to call and start dialing:

- Opens the **PhoneBook: Copy Mode** window that lets you extract existing correspondents phone numbers.
- Displays the **Dial box**. To make a phone call using the **Dial box**, enter your correspondent's details (name and phone number), and then click **OK**.
- Displays four buttons giving access to six **Quick Dial Memory Keys** each. To make a phone call using the **Quick Dial Keys**, simply click the memory key assigned to the correspondent you wish to call. The selected phone number is automatically dialed.
- You can also double-click an existing entry in the **Last Calls** list to dial out directly.
- Finally you can use the **Dialer** or your keyboard to enter the number to call. You must click on the phone Handset to start dialing.

Click here to hang up.



Adjust the volume as needed by moving the sliders up or down with your mouse cursor when using SpeakerPhone.

USING THE SPEAKERPHONE

The SpeakerPhone feature enables you to talk to your correspondents without using your phone handset.

To make and receive phone calls in SpeakerPhone mode:

Click on the button located just below the phone handset.

Click (toggle button) to display the speaker and microphone volume control sliders.

Once you are connected with your correspondent, four options become available:

Mute. Cuts your microphone off, allowing you to hear your correspondent without being heard.

Hold. Cuts your microphone and speaker off.

FlashHook. Enables you to transfer calls.

Fax Reception Mode. Allows you to start receiving a fax.

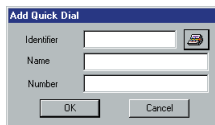
Note: Certain options may not be supported by the modem.

PROGRAMMING THE QUICK DIAL MEMORY KEYS

Quick Dial Memory Keys let you store frequently-used phone numbers, enabling you to dial a number quickly and easily.

To assign a phone number to a memory key:

1. Click to display the **Quick Dial Memory Keys** (if they are hidden).
2. Click an entry to open the **Add Quick Dial** window.
3. In the **Identifier** edit box, enter the name assigned to the memory key.
4. In the **Name** box, enter your correspondent's full name.
5. In the **Number** box, enter the phone number that will be dialed when you click on the memory key.
6. Click **OK** to validate.



Answering Machine




The voice application enables a computer equipped with a voice modem to be used as an answering machine. It supports two operation modes:

- The **Greeting Only** mode issues an announcement then hangs up.
- The **Greeting & Record** mode issues an announcement then records the caller's message.



ACTIVATING/DEACTIVATING THE ANSWERING MACHINE



To turn the answering machine on, click on the button corresponding to the desired mode (**Greeting Only** or **Greeting & Record**). The active mode is signalled by a green LED: .

To turn the answering machine off, click on the **Answering Machine OFF** button.

To be operational each mode requires the creation and selection of a specific minimum set of elements (Greeting messages, access code) that will be implemented by the answering machine.

SETTING UP THE ANSWERING MACHINE

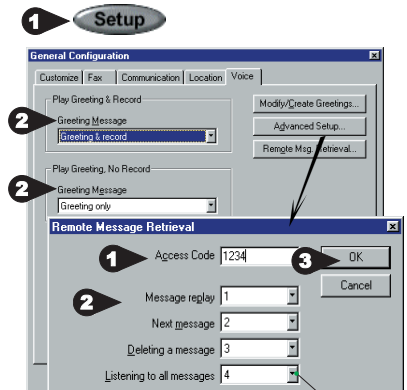
1. Click **Setup**. The **Voice** tab is automatically displayed.
2. Depending on the mode of operation you wish to activate, select from the drop-down list the greeting message to be issued.

Note: If you do not want to use the supplied pre-recorded messages, record a custom announcement.

REMOTE MESSAGE RETRIEVAL

1. Choose an **Access Code** (4 digits) for the remote dialup message retrieval.
2. Specify the phone keys you will use when listening to your message(s) remotely.
3. Validate by clicking **OK**.

Note: The **Advanced Setup** button lets you configure many advanced voice parameters such as the modem speaker level control, the maximum recording time, etc.



Once the messages have been listened to, they are archived. To listen to them remotely again, use the **Listening to all messages** key.

HOW TO REMOTELY LISTEN TO RECEIVED MESSAGES

PhoneTools' **Greeting & Record** button must have been previously activated before following these steps:

1. Call up PhoneTools remotely.
2. Immediately after hearing the **Greeting Message** for the **Greeting & Record** mode (or during the playing of the greeting if this is supported by the modem), dial the **Access Code** number to listen to all received voice messages.
3. Use the phone keys you defined in the remote dialup message retrieval section to replay, skip, delete or listen to the previously heard messages.

Note: The above will only work if the phone you are using supports *Touch Tones*.

Answering Machine



LISTENING TO RECEIVED MESSAGES



1. In the list of **Received Voice Messages**, select the message you wish to play by clicking on it.
2. Select the playback device to be used by clicking the button placed right below its icon (the selected device is signalled by a green LED:).

Plays the messages over the modem's built-in speaker.

Plays the messages through the handset connected to the modem.

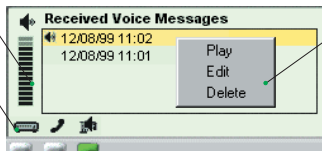
Plays the messages through the speakers connected to your sound card.

The specific playback and recording features that are available will depend on the modem type and if a sound card is installed in your computer.

3. Adjust the playback sound level by clicking on the volume control vertical gauge.
4. To start playing the message directly from the voice module, click or right click on a **Received Voice Messages** list item to display a menu that contains the **Play** option. Played messages are differentiated from unheard messages by the icon placed before the message in the list.

To adjust the playback sound level, click on the vertical gauge.

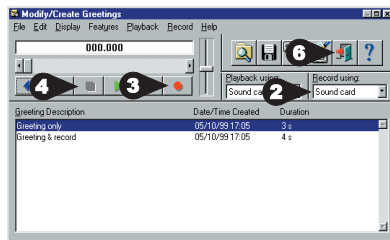
Select the **playback** and **recording** device to be used: Modem speaker, Sound card or Phone handset .



Click on a list item with your right mouse button to display this menu.

Note: Received messages can also be accessed from the window that contains the **Inbox** folder. From there, simply select the message you want to listen to, and click on the **Listen** icon:

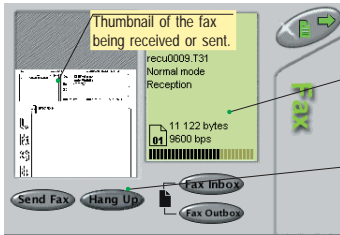
1 Modify/Create Greetings...



RECORDING A GREETING MESSAGE

Greeting messages are used to greet and guide the caller. You may use the pre-recorded greetings if they meet your needs, or you can record your own custom greetings.

1. From the **Voice** tab, click .
2. Select the record peripheral (modem, handset, sound card).
3. Click to start recording.
4. Click to stop recording.
5. A dialog box prompts you to enter the **Announcement Description**. This description should allow you to readily identify the message in the message list. Click **OK** to exit the **Announcement Description** window.
6. Exit the **Modify/Create Greetings** window.



Thumbnail of the fax being received or sent.

Transmission information.

Send Fax Hang Up Fax Inbox Fax Outbox

Send Fax

Displays the **Send Fax** window.

Hang Up

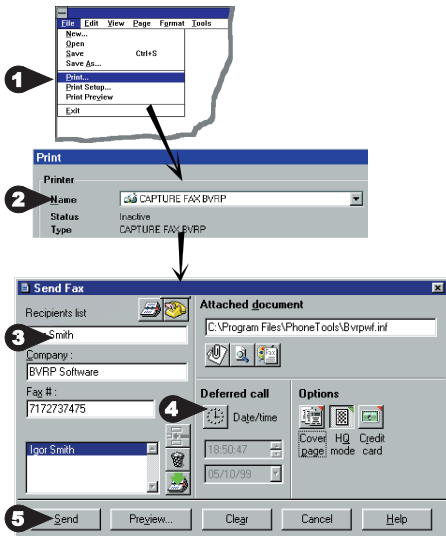
Interrupts the current fax transmission.

Fax Inbox

Displays the **Inbox** folder contents.

Fax Outbox

Displays the **Outbox** folder contents.



FAXING A DOCUMENT FROM ANY WINDOWS APPLICATION

This method, called «Print Capture», lets you fax a document directly from the Windows application in which you've created it, without opening PhoneTools.

1. You've just created a document in a Windows application: Word processor, graphic editor, spreadsheet, etc. To fax this document, keep the application and the document open and select the **Print** option from the **File** menu.
2. Select **CAPTURE FAX BVRP** as the printer driver, then click OK. The **Send Fax** window is displayed.
3. Type in the **recipients** details or extract them from the Phone Book.
4. Various transmission options are available. To enable an option, click on the corresponding button:



Defer call to a later date/time.



Open the cover page panel



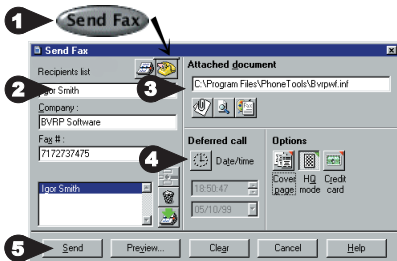
Credit card dialing (must be set up in the Location tab in the



HQ mode (High quality fax)

General Configuration window)

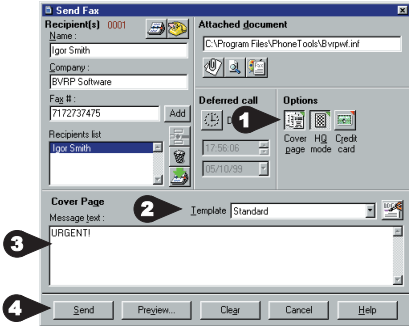
5. Click **Send** to start the transmission.



FAXING A FILE DIRECTLY FROM PHONETOOLS

1. From PhoneTools' main window, click **Send Fax** to display the **Send Fax** window.
2. Type in the **recipients** details or extract them from the Phone Book.
3. In the **Attached Document** section, click on the **Select Document** button and select the file to be sent.
4. Various transmission options are available. To enable an option, click on the corresponding button (see above).
5. Click **Send** to start the transmission.

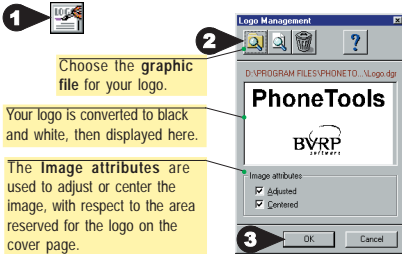
Note: Only graphic files (BMP, PCX, etc.) and ASCII files can be faxed directly. For other formats, use the **Faxing a document from any Windows application** described above.



SENDING A COVER PAGE ON ITS OWN OR ADDING A COVER PAGE TO YOUR FAX



Whatever method you choose to prepare and send a fax, you can add a cover page or even send the cover page on its own.

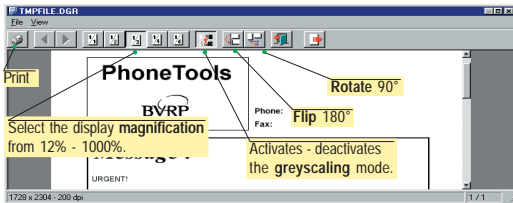
1. Click the **Cover Page** button to display the cover page section if it is hidden.
2. Select the cover page **Template** to use from the model drop-down window.
3. Right below it, in the Message text edit box, type in the message that will appear on your cover page.
4. Click **Send** to start the transmission.



ADDING A LOGO TO THE COVER PAGE


The logo should be small in size and in a graphic format supported by PhoneTools: BMP, PCX, TIF, DIB, GIF, DCX.


1. In the **Send Fax** window, click on  to display the **Logo Management** window in order to choose the logo that will be placed on the cover page.
2. Click on the **Browse** button  and select the logo graphic file.
3. Validate by clicking **OK**.

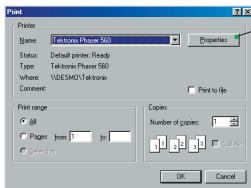


VIEWING AND PRINTING FAXES

Faxes can be viewed and printed not only from the **Inbox** and the **Outbox**, but also from the **Confirm Transmission** window.

To view a fax click the **View** button .

To print a fax, click the **Print** button .



Click this to set up options for this printer. The options available depend on the features of the printer.

Inbox/Outbox Management



PhoneTools lets you manage all your transmissions and received documents in a single window. All your transmissions are stored in a folder labeled **Outbox**, and received documents are kept in the **Inbox** folder. To display the **Inbox** folder contents, click on **Inbox** from PhoneTools' main screen. To view the **Outbox** folder contents, click on **Menu** from **PhoneTools'** main menu, then select **Outbox** from the **Send** Menu.

INBOX/OUTBOX FOLDERS - WINDOW DESCRIPTION

The window containing the **Inbox** and **Outbox** folders in which you can easily manage all your transmissions and received documents is divided into three main parts:

- the command buttons in the upper part of the window (available command buttons depend on the selected folder).
- the folders, and the highlighted folder contents in the center.
- transmission information on the selected documents in the lower part.

The screenshot shows the PhoneTools window with the 'Inbox' folder selected. The window is divided into three main sections: a top bar with command buttons, a central list of documents, and a bottom section for detailed transmission information. Annotations point to various elements:

- Buttons specific to the Inbox folder.** (Points to buttons like 'View', 'Print', 'Save' in the top bar)
- Buttons specific to the Outbox folder. They are active when you click on Outbox from the Send menu.** (Points to buttons like 'Send', 'Cancel' in the top bar)
- The Type and Status of the document is indicated by the following icons:** (Points to the 'Type' and 'Status' columns in the document list)
- Double-click on a folder to display its contents.** (Points to the 'Inbox' folder in the left sidebar)
- Transmission information about the selected document.** (Points to the detailed information section at the bottom)
- Use these buttons to sort the list on the selected item.** (Points to the sort buttons in the document list header)
- Reduced view of the highlighted fax.** (Points to a small preview of a fax document)

Legend for document icons:

	HQ (Fine) Fax		Viewed
	Standard Fax		Printed
	Voice message		Played

COMMAND BUTTONS COMMON TO THE INBOX AND OUTBOX FOLDERS

Use	To...	Use	To...
	...View the highlighted document in the Graphic Viewer.		...Delete the highlighted document.
	...Print the highlighted document.		...Display information on the highlighted document.
	...Save the highlighted document to disk.		...Display the Help.

FOLDERS

This window always includes the following folders:

- The **Inbox** folder that lists all received documents. Its contents is automatically displayed when you click on **Inbox**.
- The **Outbox** folder that contains all transmissions (current, deferred, deactivated). Its contents is automatically displayed when you select **Send - Outbox** from the **Menu** button.
- The **Finished Transmissions** folder contains all the finished transmissions (successful and canceled) if you have configured Phone Tools to keep successful transmissions (see **What is the outbox?** on the following page). To display its contents click twice on the folder. From there you can modify and/or reactivate a transmission.

Inbox/Outbox Management



WHAT IS THE INBOX?

All received documents are stored in the **Inbox** folder. When a document is received, PhoneTools notifies you by displaying a **Document(s) received** warning (and emits a **beep** when this option is selected in the **Notifications** window). These notifications are removed when the document has been consulted.

A **double-click** on a received document will automatically display the document if it is a fax. If it is a voice message then the **Voice Player** window is displayed.

The **Inbox** folder can contain up to **1024 documents**, that are not limited in size. When the number of 1024 documents is reached, there is no more space to receive documents. It is advised to delete unnecessary documents. However, if you want to store copies of these documents, you can print them or save them to disk in another directory.

Command buttons specific to the Inbox folder

The following command buttons are available when the **Inbox** folder is selected.

Use	To...	Use	To...
	...Listen to the highlighted voice message.		...Change the status of a document: consulted to not consulted, printed to not printed, resent to not resent.
	...Resend the highlighted fax.		

WHAT IS THE OUTBOX?

All transmissions are stored in the **Outbox** folder, which acts as a transmission queue. If the transmission runs smoothly, the document is deleted and the information is then recorded in the **Send Log**.




If the option **Keep finished transmissions** is checked on the **Communications** folder tab found under the **General Configuration** menu, then all transmissions will not be deleted after being transmitted and will be added to the **Finished Transmissions** folder. The **Finished Transmissions** folder is limited to 1024 transmissions. You should delete regularly the documents stored in the **Finished Transmissions** folder to avoid reaching this limit.

If an error occurs, the transmission is canceled and the document is saved in order to allow you to correct the error (wrong number, etc.).

To confirm that a document was sent correctly to a recipient, open the **Send Log** which contains the information concerning past transmissions.

Command buttons specific to the Outbox folder

The following command buttons are available when the **Outbox** folder is selected.

Use	To...	Use	To...
	...Modify the fax transmission schedule (phone number, date and hour).		...Reactivate a deferred or canceled transmission.
	...Deactivate a deferred transmission.		

PhoneBook



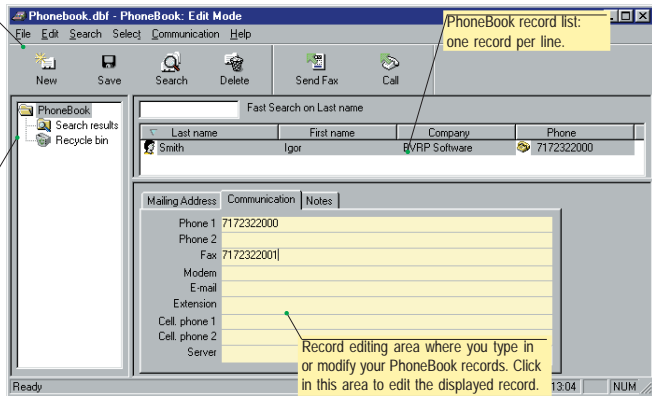
The PhoneBook stores the names, phone, fax and modem numbers, and many other details for each recipient.

OPENING THE PHONEBOOK WINDOW

To open the **PhoneBook**, click on **Menus** from PhoneTools' **Status Bar**, then select the **PhoneBook!** menu option. The **PhoneBook** window in which you can add, modify, and delete your PhoneBook records is displayed:


From left to right the first three buttons respectively allow you to:
Create a new record
Save new record/Save changes
Define and apply **Search Criteria**.


The group list displays:
- the current **PhoneBook** tree,
- the **Search results** folder where the results of a search are stored,
- the **Recycle bin** (all deleted records are stored in this folder).

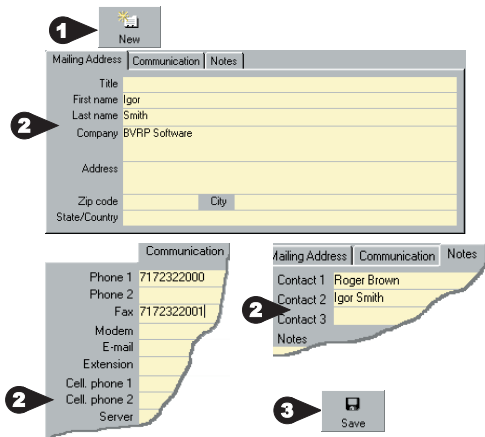


CREATING NEW RECORDS

When you first access the PhoneBook, it is empty.

1. To start building records, click  or click in the record editing area.
2. Enter the information in the editing area.
3. When entering information into the record is

over, click  to save the new record. If this icon is grayed out, it means you have not yet entered the minimum information required to complete a record; be sure to enter at least the **Name**.



IMPORTING EXISTING RECORDS

If the records already exist as files structured in a standard format used by other popular information-storage applications such as databases or spreadsheets, you can import these records instead of typing them in again. For a detailed explanation on how to use this function, press F1 from the **Import Records** window.



SELECTING RECORDS

You can **select records** in various ways:

- To make a **contiguous selection**: click on the first item to select. Next, press and hold the **[Shift]** key, then click the last item to select. All items between and including the first item and the last item will be highlighted. Then, press the right mouse button: a context menu is displayed providing you with the **Select highlighted records** option.
- To make a **non-contiguous selection** with the mouse, press and hold the **[Ctrl]** key. Click on any item you want to add to the selection, then press the right mouse button. A context menu is displayed providing you with the **Select highlighted records** option.
- To select records using the **keyboard**, click on the record you would like to select, then press the **[Spacebar]**.
Selected records are flagged with a green check-mark.





This feature, combined with the PhoneBook: Copy Mode is a very easy way to carry out a fax mailshot.



USING THE PHONEBOOK FOR DIALING

Once a recipient has been entered into the PhoneBook, you can open the **PhoneBook: Copy Mode** window to automatically fill in the recipients fields.

From the **Phone** module:

- Click on . The **PhoneBook: Copy mode** window is automatically displayed.
- Click on .

From the **Fax** module:

- Click on  to display the **Send Fax** window, then click on .
- Then:

Use

To...



...Copy the current record details.



...Copy the record selected in current group.



...Copy the current PhoneBook.

When the request comes from the **Send Fax** window and a **Cover Page** is used, the recipients' name and fax number are automatically added to the cover page.



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Conventions

It is important to understand the terms and conventions used in this manual. For information about the conventions used and how to use Windows, help, menus and dialog boxes, consult your Windows user's manual.

Minimum configuration

PhoneTools requires the Windows® 95, Windows® 98 or Windows NT™ operating system. For any information concerning upgrades, contact BVRP Software or your distributor.

For PhoneTools to operate properly, check the following points:

- Computer : Pentium 90 or higher.
- Local hard drive with 8 MB free.
- RAM memory 16MB for Windows® 95 and Windows® 98, or RAM memory 32MB for Windows NT™.

Limitations

PhoneTools is designed and tested to work with modems, and at the same time to follow the rules of using communication material with telephone systems. To avoid communication problems, it is not advised to use PhoneTools with any other modem than the one supplied with it.

If the modem supplied with PhoneTools does not have voice features, only the fax, data and terminal emulation features will be available.

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