

VoiceTrak

Call Processing And Voice Mail System

USERS
GUIDE

VoiceTrak

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Thank you for choosing VoiceTrak for your call processing and voice mail system. We think you'll find VoiceTrak easy to use and an important part of your communication system.

The following guide is intended to provide you with information necessary to make your voice mail system experience positive. The Users Guide is organized to help you understand each feature of the system from start to finish and is outlined for the first-time user. As you become more familiar with the system, you will more than likely follow the voice prompts offered while accessing the system.

Think of VoiceTrak as a personal secretary: It manages your messages, files them or sends them to the appropriate party. You can speak to your personal secretary by dialing an access number given to you by your system administrator and then providing a mailbox number and personal password. The secretary will then offer you a list of options from which you might choose to complete your task.

Although detailed instructions are offered in this guide, most instructions can be completed by simply listening to the prompts of the system. The following are key terms and points to keep in mind when using the system:

Main Menu: A list of options first offered after hearing the Main Salutation. All activity originates from the Main Menu. It is from here that you access the Sub Menus that offer the different features of VoiceTrak. **Touch 9** or **##** to return to the Main Menu from Sub Menus.

Main Salutation: The first greeting heard when an internal or outside caller accesses the system. This greeting will be personalized for your company.

Sub Menus: Menus accessed to control the various features of VoiceTrak.

Personal Mailbox: Your private area of VoiceTrak where your messages are kept and sent to internal users.

Ergonomically Designed Keyboard: There are four functions that you will use more than any others and these have been designed to coincide with the four corners of the touch-tone dial pad on your telephone. They are:

Touch 1 to Listen or Review.

Touch 3 to Send or Record.

Touch # to Save or Enter.

Touch * to Delete.

Other commands are also easy to remember:

Touch 7 to **R**eplay to a message from an internal user.

Touch 8 to **T**ransfer a message to an internal user.

Password: A number you choose that protects your mailbox from access by other users.

System Administrator: The person in your company responsible for the maintenance of the VoiceTrak system.

Dial Through: When you become more familiar with the system, you may find it bothersome to have to listen to the complete prompts. VoiceTrak is designed to dial through the greetings and prompts so that you can easily get to the option you choose. You may choose your selection at any time while the prompt is playing.

VoiceTrak may also offer the ease of skipping greetings or prompts when sending a message or recording a spoken name, etc. If the phone system supports this feature, your system administrator will provide you with the "skip" number.

For example: Assume 3 has been designated as the skip key. A caller dials an extension and hears the personal greeting. The caller can bypass this greeting and go directly to the record tone by pressing 3. Likewise, the instructions in Mailbox Setup Functions can be bypassed by pressing 3 and proceeding directly to the record tone.

Accessing VoiceTrak

One-touch access button: The most important step to using VoiceTrak is learning how to access and alert the system that you are an internal user. Some newer phone systems allow access by pressing a pre-programmed button on the phone. A one-touch button eliminates steps one through three below. When the button is pressed, VoiceTrak will ask for the password for the mailbox assigned to that extension, if one has been established. The message status will then be broadcast. *To check messages from a phone other than your own,* press the one-touch access button. Press the # sign when VoiceTrak says, "Please enter your password." VoiceTrak will now play the opening salutation. Skip to step two below.

Regular access: If the phone system does not allow one-touch access to the user mailbox, four steps are required to access VoiceTrak. (It is possible that a button has been pre-programmed on your phone to dial the VoiceTrak access number. This button eliminates step one below. Do not confuse this with the pre-programmed button mentioned above.)

1. Access VoiceTrak by dialing the VoiceTrak access number provided by the System Administrator or pressing the VoiceTrak button on the phone. The Main Salutation customized for your company will be played.
2. **Touch *** at any time during the Main Salutation. This alerts VoiceTrak that an internal caller is using the system. The following prompt will be played: *"Please enter your extension number."*
3. Enter your mailbox number. If your password has been established, the following prompt will be played: *"Please enter your password."*

Enter the password. The system will list the message status and provide a list of other available options.

Mailbox Setup

The first step to becoming an internal user of the system is to customize your mailbox. This includes entering a personal password so that other system users cannot access your messages; recording a personal greeting; and recording your spoken name.

Personal Greeting

You may keep two personal greetings in the system and change them at any time. Many people choose to use greeting 1 most frequently, and greeting 2 for special situations, such as absence for a business trip or vacation.

***Sample greeting 1:** "Hi. This is David Letterman. I'm either on another call or away from my desk right now, but I check these messages often. Please leave your name, telephone number, a message and the best time to return your call. Thanks for calling."*

***Sample greeting 2:** "Hi. This is Jay Leno. I'll be out of the office until Monday, but I check these messages daily. If your call is urgent, please touch 125 right now to speak with Conan O'Brien for immediate assistance. Otherwise, wait for the tone and leave a message including your name, telephone number, a message and the best time to return you call. Thanks for calling."*

To Record Your Personal Greeting:

1. Access VoiceTrak.
2. **Touch 4** for Mailbox Setup Functions. You will hear:
"For your personal greeting, touch 1 for greeting 1 and 2 for greeting 2. To change your password, touch 3. For your spoken name, touch 4. For Distribution Lists, touch 7. For Outcall Notification, touch 8"
3. **Touch 1** for greeting number 1. You will hear:
"To listen to your personal greeting, touch 1. To record a greeting, touch 3. Finish by touching the # sign."
4. **Touch 3** to record greeting 1 and begin speaking at the tone. When finished, **Touch #**. To review your greeting and hear how you will sound to callers, **Touch 1**.
5. **Touch 5** at the prompt to activate the greeting.
6. **Touch 9** to return to the Main Menu
- or -
Touch ### to exit VoiceTrak.

Repeat these instructions to record personal greeting 2.

To Record Your Personal Password:

1. Access VoiceTrak.
2. **Touch 4** for Mailbox Setup Functions. You will hear:
"For your personal greeting, touch 1 for greeting 1 and 2 for greeting 2. To change your password, touch 3. For your spoken name, touch 4. For Distribution Lists, touch 7. For Outcall Notification, touch 8."
3. **Touch 3** for your personal password. You will hear:
*"To listen to your existing password, touch 1. To enter a new password, touch 3. To remove your password protection, touch *, or 9 to return to the main menu."*
4. **Touch 3** to enter a new password. You will hear:
"Please enter your new password, from 4 to 15 digits."
5. Enter a password. Many people choose an easy-to-remember telephone

"Confirm the same new password."
6. Enter the password again for confirmation. If your second entry does not

"I'm sorry, those digits did not match your first entry. Please enter your new password from 2 to 15 digits."

If your second entry matched your first entry, you will hear:
"Your new password is now active."
7. **Touch 9** to return to the Main Menu
- or -
Touch ### to exit VoiceTrak.

Note: Passwords may also be entered or changed from the computer keyboard.

To Record Your Spoken Name

1. Access VoiceTrak.
2. **Touch 4** for Mailbox Setup functions. You will hear:
"For your personal greeting, touch 1 for greeting 1 and 2 for greeting 2. To change your password, touch 3. For your spoken name, touch 4. For Distribution Lists, touch 7. For Outcall Notification, touch 8."
3. **Touch 4** to record your spoken name. You will hear:
"To listen to your spoken name, touch 1. To record your name, touch 3 and begin at the tone. Finish by touching #."
4. **Touch 3** to record your spoken name and begin speaking at the tone.

Touch # when finished. If you wish to hear your recording, **Touch 1**.
5. **Touch 9** to return to the Main Menu
- or -
Touch ### to exit VoiceTrak.

Retrieving Messages

1. Access VoiceTrak. You will hear.
"You have ___ new messages, ___ old message. For new messages, touch 1. For old messages touch 2. To send a message, touch 3. For Mailbox Setup functions, touch 4. For User Options, touch 5."
2. **Touch 1** to listen to new messages
- or -
Touch 2 to listen to old messages.
3. VoiceTrak now offers you several options for this message:

Touch 1 to play the message again.
Touch 2 to listen to the day, date and time the message was recorded.
Touch 5 to pause
Touch 4 to rewind
Touch 6 to fast forward
Touch 7 to reply to a message sent from an internal user.
Touch 8 to transfer a message to an internal user.
Touch # to save the message.
Touch * to delete the message.

These options may be selected at anytime during the message.

4. **Touch 0** to repeat the prompts
Touch 9 to return to the Main Menu
- or -
Touch ### to exit VoiceTrak.

NOTE: If the message was sent internally, the user's name will precede the message. If the message was left by an outside caller, the message will begin with the text.

Sending Messages

1. Access VoiceTrak. You will hear:
"You have ___ new messages, ___ old message. For new messages, touch 1. For old messages touch 2. To send a message, touch 3. For Mailbox Setup functions, touch 4. For User Options, touch 5."
2. **Touch 3** to send a message. You will hear:
"Begin speaking at the tone. To review your message, touch 1. To finish, touch the # sign."
4. Begin recording at the tone.
5. If you wish to review your recording, **Touch 1**. If not, **Touch #**, which signals the end of the recording. You will then hear:
"To send this message standard, touch 1. To send this message certified, touch 2."
6. **Touch 1** to send the message standard (no notification will be given to alert you that the message has been received)
- or -
Touch 2 to send the message certified (VoiceTrak will alert you when the message has been received). You will then hear:
"Please enter the mailbox number of the person that will receive this message."
7. Enter the appropriate mailbox number. You will hear:
*"To (recipient name). Please enter the next recipient's mailbox number or touch * to cancel all entries. Touch the # sign to finish addressing."*
8. **Touch *** to cancel and begin again.
- or -
Enter another user's mailbox number. Continue this process until you are through addressing.
11. **Touch #** when you are finished addressing.
12. **Touch 9** to return to the Main Menu
- or -
Touch ### to exit VoiceTrak.

Distribution Lists

Distribution lists allow you to send one message to several users at the same time.

To Establish

1. Access VoiceTrak. You will hear:
"You have ___ new messages, ___ old message. For new messages, touch 1. For old messages touch 2. To send a message, touch 3. For Mailbox Setup functions, touch 4. For User Options, touch 5."
2. **Touch 4** for Mailbox Setup Functions. You will hear:
"For your personal greeting, touch 1 for greeting 1 and 2 for greeting 2. To change your password, touch 3. For your spoken name, touch 4. For Distribution Lists, touch 7. For Outcall Notification, touch 8."
3. **Touch 7** for distribution lists. You will hear:
*"To hear existing lists, touch 1. To add a list touch 3 To change a list, touch 5. To delete a list, touch *. To return to the Main Menu, touch 9."*
4. **Touch 1** to listen to the existing lists
- or -
Touch 3 to add a list
- or -
Touch 5 to modify a list
- or -
Touch * to delete a list.

To Add a List

1. After choosing option 3, you will hear:
"The next available list number is ___. At the tone, please record a name for this list of users. When finished, touch the # sign."
2. Record a name that describes the list.
3. **Touch #** if you are satisfied with the name that describes the list. You will hear:
*"To cancel and re-record, touch *. To accept, touch #. To return to the main menu, touch 9."*
4. **Touch #** to accept the list. You will hear:
"Do you wish to add names to this list? If yes, touch 1. If no, touch 2. To return to the main menu, touch 9."
5. **Touch 1.** You will hear:
"Enter the message box number to be added."
6. Enter the mailbox number of the party to receive the message. You will hear:
"(Spoken name) added. Enter the message box number to be added."
7. Continue adding mailbox numbers, or, **Touch #** when your list is completed.
8. **Touch 9** to return to the main menu. You are now ready to send the list.

To Modify a List

1. After choosing option 5, you will hear:
"Enter the list number to modify."
2. Enter the list number you wish to change. You will hear the list name and:
"Is this correct? If yes, touch 1. If not, touch 2."
3. **Touch 2** if incorrect and repeat above instructions
- or -
Touch 1 if correct. You will hear:
*"To hear a list of members, touch 1. To add a list, touch 3. To change the list name, touch 5. To delete list members, touch *. To return to the Main Menu, touch 9."*
4. Choose the appropriate response and follow the voice prompts and appropriate instructions in this manual. When modifications have been made,
5. **Touch 9** to return to the Main Menu
-or-
Touch ### to exit VoiceTrak

To Delete a List

1. After choosing *, you will hear:
"Enter the list number to be deleted."
2. Enter the list number you wish to delete. You will hear:
"List number ___ deleted."
3. **Touch 9** to return to the Main Menu
- or -
Touch ## to exit VoiceTrak.

Sending Distribution Lists

1. Access VoiceTrak. You will hear:
*"You have ___ new messages, ___ old messages.
For new messages, touch 1. For old messages, touch 2. To send a message,
touch 3. For Mailbox Setup functions, touch 4. For User Options, touch
5."*
2. **Touch 3** to send a message. You will hear:
*"Begin speaking at the tone. To review your recording, touch 1. Finish by
touching #."*
3. Record the message and **Touch 1** to review or **Touch #** to finish. Do not **Touch #** until you are satisfied with the recording. The # sign signals the end of the recording. You will hear:
*"To send this message standard, touch 1. To send this message certified, touch
2."*
4. **Touch 1 or 2.** You will now hear:
*"Please enter the mailbox number for the person you wish to send this message
to."*
5. **Touch 7** plus the list number desired (1-9). You will now hear:
"Your message has been sent."

User Options

These features may be toggled on or off by completing the instructions. Example: To toggle on Do No Disturb, follow the instructions listed. To turn it off, repeat the instructions.

1. Access VoiceTrak. You will hear:
"You have ___ new messages, ___ old messages. For new messages, touch 1. For old messages, touch 2. To send a message, touch 3. For Mailbox Setup functions, touch 4. For User Options, touch 5."

2. **Touch 5** for User Options.

3. You are now offered the following options:

Touch 1 to control Day/Date/Time stamp. If toggled on, this feature allows you to listen to the day, date and time the message you are playing was recorded.

Touch 2 for LIFO/FIFO (Last In, First Out or First In, First Out). This controls the order your messages will be replayed.

Touch 3 for Do Not Disturb. This feature places your extension in a Do Not Disturb mode. The call processing portion of VoiceTrak will send all *outside* callers directly to your mailbox without ringing your extension. **

Touch 5 for Call Screening (see page 11). **

Touch 6 for Call Forwarding (see page 12).

**** NOTE:** These features may be deactivated by your system administrator. Call Screening and Do Not Disturb work only through the call processing system and do not affect the instrument on your desk. Internal callers will still be able to ring through on your extension. Contact the System Administrator to determine if these features are available with your phone system.

4. When you have toggled on/off the desired features,
Touch # to save your choices.

5. **Touch 9** to return to the Main Menu
- or -
Touch ## to exit VoiceTrak.

Call Screening

Call Screening allows you to hear the name of the caller and then decide if you wish to speak with him/her or transfer them directly to your mailbox. If Call Screening is activated, outside callers will be asked to state their name at the tone. VoiceTrak will record that name, transfer the call to your extension and then "announce" the caller. You will be given the option to accept the call or send the caller directly to your mailbox.

Again, this feature may be toggled on/off by completing the instructions.

NOTE: Call Screening operates only with the call processing system. It may be deactivated by your system administrator, or the features of your telephone system may not allow use of this feature. Contact your system administrator if you have questions.

To Turn Call Screening On or Off

1. Access VoiceTrak. You will hear:
"You have ___ new messages, ___ old message. For new messages, touch 1. For old messages touch 2. To send a message, touch 3. For mailbox setup functions, touch 4. For user options, touch 5."
2. **Touch 5** to select User Options.
3. **Touch 5** to select Call Screening.
4. **Touch 1** to turn Call Screening OFF
- or -
Touch 2 to turn Call Screening ON.
5. **Touch 9** to return to the Main Menu
- or -
Touch ### to exit VoiceTrak.

Accepting/Rejecting Screened Calls

1. VoiceTrak will call your extension and you will hear:
"(Name of caller). Please touch 2 to accept this call or 7 to refuse it."
2. **Touch 2** to accept the call
- or -
Touch 7 to refuse the call and send to voice mail.

Call Forwarding

This feature is used to temporarily forward your calls to another telephone. Your telephone system may not allow use of this feature. Call Forwarding does NOT control intercom calls or calls transferred from another extension to your extension. Call Forwarding works only with calls directed through VoiceTrak.

To Activate Call Forwarding

1. Access VoiceTrak. You will hear:
"You have ___ new messages, ___ old message. For new messages, touch 1. For old messages touch 2. To send a message, touch 3. For Mailbox Setup functions, touch 4. For User Options, touch 5."
2. **Touch 5** for User Options.
3. **Touch 6** for Call Forwarding. You will hear:
*"To review Call Forwarding, touch 1. To cancel current Call Forwarding, touch *. To enter a new Call Forwarding extension, touch 3. To activate Call Forwarding, touch 5, or touch 9 to return to the main menu."*
4. **Touch 1** for the current status. You will hear:
"Call Forwarding is turned off." or "Call Forwarding is turned on."

Touch * to cancel Call Forwarding and erase the forwarding mailbox.

Touch 3 to enter a new Call Forwarding extension. You will hear:
"Please enter the extension number of the person you wish to have your calls forwarded to."
5. Enter the forwarding extension number. You will hear:
"Your calls will be forwarded to (spoken name)."
6. **Touch 5** to activate or deactivate (without erasing the forwarding mailbox) Call Forwarding. You will hear:
*"Call Forwarding is turned off." or
"Your calls will be forwarded to (spoken name)."*
7. **Touch 9** to return to the Main Menu
- or -
Touch ## to exit VoiceTrak.

If you use Centrex/ESSX or a similar service and your phone equipment allows it, VoiceTrak can forward your calls to another phone number - including your home or car phone. This number must be entered from the keyboard only in the Fwd To field in Mailbox Setup. Please see the System Administrator for additional information.

Outcall Notification

VoiceTrak can be customized to call different telephone numbers when you receive a message. You may program the system to call your desk, home phone, car phone, etc., by storing these phone numbers in an outcall table. The table is time sensitive; specific numbers will be called based on the time of day you have programmed into the system. Up to nine entries may be entered.

Due to the many pager companies and differing services, it is not recommended to enter outcall strings via the phone. Please see your system administrator to add the appropriate outcall notification for your mailbox using the VoiceTrak keyboard.

Example: You want VoiceTrak to call your digital paging company. After an answer you want VoiceTrak to send the digits 2345678 with a dash, the extension number 110 and a # sign. (We assume that your pager company inserts a dash if it receives a *.) Therefore, you want the dial string of:

9,2703880;,,,2345678*110#N so the pager display will show 2345678-110.

The number of pauses (comma) after the semi-colon will vary depending on your provider. It may be necessary to add or subtract pauses to achieve the proper configuration for your mailbox.

Your system administrator can limit the number of digits you may dial during an outcall notification. Some pagers require 30 or 40 digits. Talk with your system administrator.

Voice Announce Pagers are designed to play a voice message. It may be possible for VoiceTrak to call your voice pager, play the new message, save the new message as an old message, and not call you again until a new message has been received. Create a standard outcall dial sequence and add the letter "V" at the end:

9,2703880 V

The system administrator must program this feature.

Cascade Feature. VoiceTrak can dial a series of pagers for a 'call escalation' scenario. This can be useful for customer service operations where a technician is paged after hours. If the message is not retrieved after a certain period of time, an alternate pager can be called. This process can continue for up to 5 different pagers (probably ending with the boss). The Cascade feature can insure quality service after the office is closed. See the system administrator to establish Cascade calling.

To Add an Entry (Outcall Notification Continued)

1. Access VoiceTrak. You will hear:
"You have ___ new messages, ___ old message. For new messages, touch 1. For old messages touch 2. To send a message, touch 3. For mailbox setup functions, touch 4. For user options, touch 5."
2. **Touch 4** for Mailbox Setup Functions. You will hear:
"For your personal greeting, touch 1 for greeting 1 and 2 for greeting 2. To change your password, touch 3. For your spoken name, touch 4. For Distribution Lists, touch 7. For Outcall Notification, touch 8."
3. **Touch 8** for Outcall Notification. You will hear:
"You have no notification entries."
- or -
"You have ___ notification entries."

"To review, touch 1. To proceed, touch 2. To exit, touch the # sign."
4. **Touch 2** to proceed. You will hear:
"To add an outcall entry, touch 1. To modify, touch 2. To delete, touch 3. To exit, touch the # sign."
5. **Touch 1** to add an entry. You will hear:
"Please enter the outcall telephone number for notification."
6. Enter the desired extension or telephone number.
7. **Touch #** when finished entering the number. You will hear the number entered:
"Is this correct? If yes, touch 1. If no, touch 2."
8. **Touch 2** if incorrect and repeat the above instructions
- or -
Touch 1 if correct. You will hear:
"Record your notification prompt at the tone. Touch the # sign when finished."

9. Record a message at the tone. This message should be a general statement, *"This is the messaging system for Oprah Winfrey. Please inform her that messages are now in her mailbox."*

NOTE:

If you do not record a personalized prompt, the system will insert a standard prompt.

10. You will now be prompted to enter the start time, start date, stop time and touch # instead of recording a personal prompt. stop date. These are all four-digit numbers based on a military clock.
For example:

0800	Start time 8:00 am
0101	Start date January 1
1700	Stop time 5:00 pm
1231	Stop date December 31

11. When you are finished, you will hear:
"You have ___ notification entries. To review, touch 1. To proceed, touch 2. To exit, touch the # sign."
12. **Touch ###** to exit VoiceTrak.

NOTE: Outcall notifications may be entered from the keyboard by your System Administrator.

To Delete an Entry (Outcall Notification Continued)

1. Access VoiceTrak. You will hear:
"You have ___ new messages, ___ old message. For new messages, touch 1. For old messages, touch 2. To send a message, touch 3. For Mailbox Setup Functions, touch 4. For User Options, touch 5."
2. **Touch 4** for Mailbox Setup Functions. You will hear:
*"For your personal greeting, touch 1 for greeting 1 and 2 for greeting 2.
To change your password, touch 3. For your spoken name, touch 4.
For Distribution Lists, touch 7. For Outcall Notification, touch 8."*
3. **Touch 8** for Outcall Notification. You will hear:
*"You have no notification entries."
- or -
"You have ___ notification entries."

"To review, touch 1. To proceed, touch 2. To exit, touch the # sign."*
4. **Touch 2** to proceed. You will hear:
*"To add an outcall entry, touch 1. To modify, touch 2.
To delete, touch 3. To exit, touch the # sign."*
5. **Touch 2** to modify
- or -
Touch 3 to delete. You will hear:
*"Please enter the Outcall Notification entry to be changed."
- or -
"Enter the Outcall Notification entry to delete. To delete all entries,
touch *. To exit, touch the # sign."*
6. Enter the Outcall Notification entry to be deleted or changed. If you have deleted an entry you may now return to the Main Menu and exit VoiceTrak. If you have chosen to change an entry, you will hear:
"Please enter the outcall telephone number for notification."
7. Follow steps 6-12 on pages 14-15.

To Call VoiceTrak

From the office: _____

Outside the office: _____

Mailbox Information

Mailbox number: _____

Password: _____

Special Features

Skip Key number: _____

Transfer Outside Caller To Voice Mail

You can easily transfer an outside caller to the voice mailbox of another system user (on most phone systems). After getting permission from the outside caller, press the button to transfer a call, usually the <Transfer> or <Hold> key, and dial the VoiceTrak extension number. When you hear the main VoiceTrak greeting, dial the desired mailbox number, press *, then hang up. The caller will hear the personal greeting and be prompted to leave a message.

Leave Quick Message in a Voice Mailbox

An alternative approach can be used to send a quick message to someone else on the system. Access the main VoiceTrak greeting for your company ("Thanks for calling ABC Company..."). When you hear the main greeting, dial the **mailbox number** plus the * key. After a short pause the personal greeting of the called party will begin to play. On most systems you may press a "skip key" to skip the personal greeting and begin recording. (As a default the '3' key is used as the skip key.) This technique is a faster way to send messages, but to send certified messages and group messages you must first access your mailbox.

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