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## *Impact Call* User's Guide

Comdial® strives to design the features in our communications systems to be fully interactive with one another. However, this is not always possible, as the combinations of accessories and features are too varied and extensive to insure total feature compatibility. Accordingly, some features identified in this publication will not operate if some other feature is activated.

Comdial® disclaims all liability relating to feature non-compatibility or associated in any way with problems which may be encountered by incompatible features. Notwithstanding anything contained in this publication to the contrary, Comdial® makes no representation herein as to the compatibility of features.

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# 1

## Introducing Impact Call

### 1.1 Using This Guide

This user's guide contains two sections.

Section 1, *Introducing Impact Call*, familiarizes you with the software's basic features and startup requirements.

Section 2, *Using Impact Call*, provides basic call-handling details and discusses special-purpose features.

### 1.2 Describing Impact Call

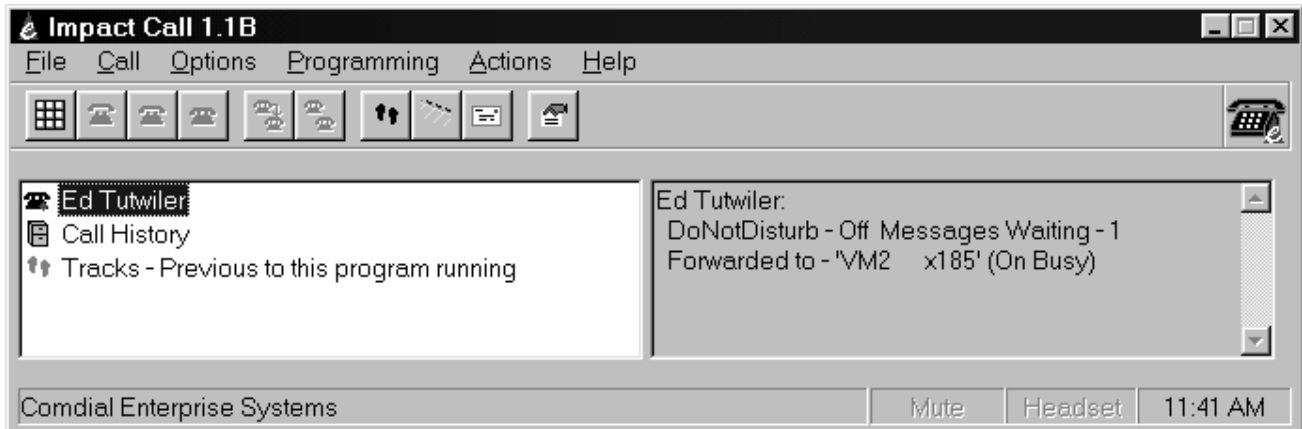
Impact Call is software that runs on a personal computer and works in conjunction with a digital communications system. The Impact Call software speeds call handling by providing the desktop PC with call control features. Among the features that Impact Call makes available to you are:

- real-time status updates of telephone activity,
- wireless pagers,
- access to system-wide features such as Park Orbits,
- full keyboard and mouse interfaces (the program uses a special keyboard for Impact Call functions but does not conflict with Windows® keyboard commands),
- printed reports,
- database access on incoming and outgoing calls.

**NOTE:** *Anytime you are operating Impact Call, you can press F1 to open the on-line help file. If you press F1 while you have a dialog box open, the help file for that particular dialog box appears.*

## 1.3 Starting The Program

Your installer loaded the Impact Call software and arranged for it to be active at startup. If it isn't active, you can start the program by clicking **Start/Programs/Impact Call** or clicking on the Impact Call icon.



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**Impact Call's Main Window**

## 1.4 Understanding Some Special Terms

There are a few specialized terms sprinkled through this publication. The following list defines a few of the more common terms you may encounter.

**Answer** answering the currently ringing call

**Both** establishing a conference between Impact Call, the current call, and the last call put on hold

**Conference** joining stations together on a call—conference capacity can be as large as permitted by the communications system

**I.D.** text attached to a call so you can remember its details if the call returns to you

**Park** placing or picking up call from any of 90 park orbits

**Pick** answering calls that ring at another extension

**Release** another term for hanging up on a call

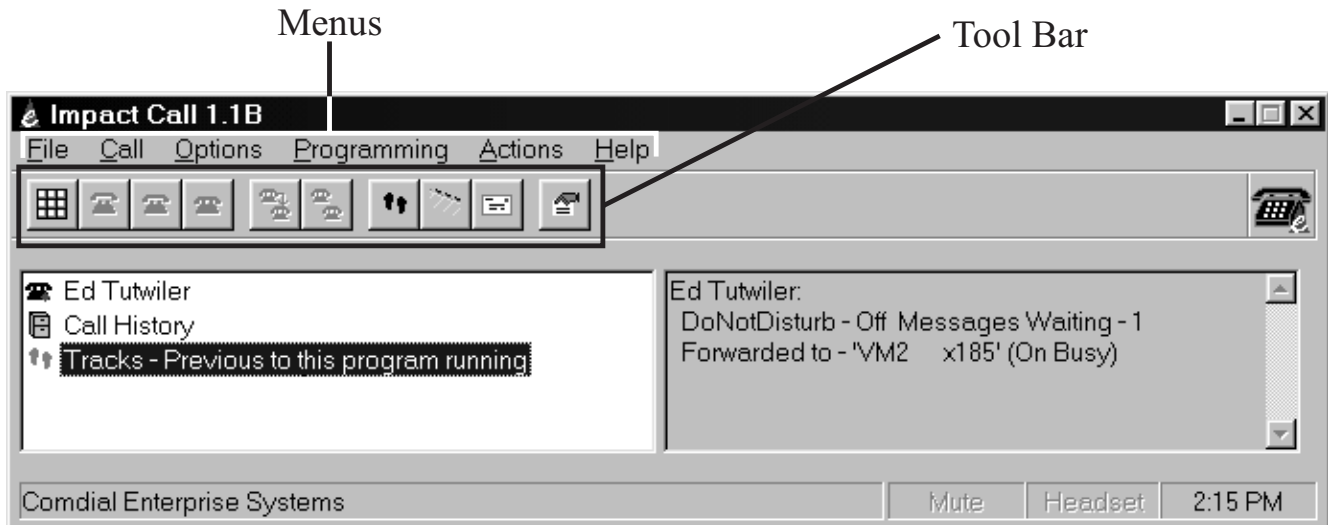
**Split** switching between the current call and the last call on hold—the current call goes on hold

**Silent** stops the Impact Call PC's station from ringing—silenced calls are still answerable until the next call rings

**Tap** retrieving the last call placed on hold, transferred, or parked

## **1.5 Detailing The Impact Call View**

The main Impact Call window provides an overview of the activity on the digital communications system.



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### **1.5.1 Using The Drop-Down Menus**

The drop-down menus display a variety of options, some are only available through the drop-down menu, some are also available through the toolbar.

### **1.5.2 Using The Tool Bar**

As with the drop-down menus, the toolbar provides commands that activate when you click on them—some unique and some duplicating options from the drop-down menu. Holding the cursor over a tool icon will display that tool's function.

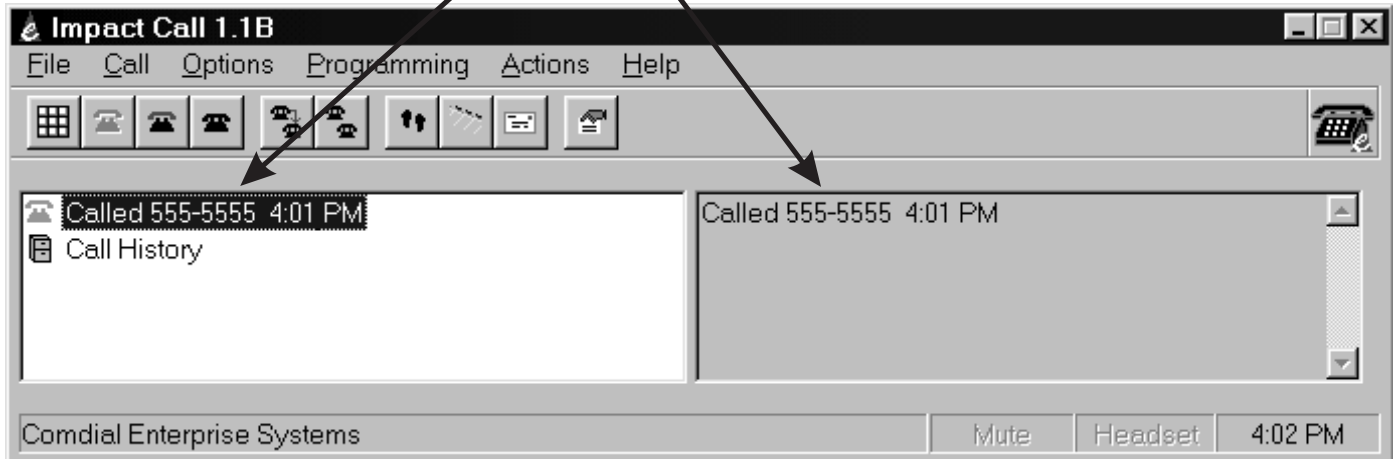


### **1.5.3 Describing The Station Status Icons**

The icons indicate the operational status of the stations. You can click one of the buttons from the tool bar to show the icons in small or large format. Icon definitions are as detailed in the following table:

<b>Telephone State</b>	<b>Telephone Icon Color</b>	<b>Handset Icon Color and Position</b>
On Hook	Black	Black
Do Not Disturb	Black with red slashed circle	Black
Off Hook	Black	Black—lifted over telephone Icon
Calling	Black	Yellow—lifted over telephone Icon
Ringing	Dark Blue	Light Blue
Connected	Green	Green—lifted over telephone Icon
Message Waiting	Black with red light showing	Black
On Hold	Black	Red—lifted over telephone Icon
Out Of Service	Gray	Gray

## Active Calls



call004

### **1.5.4 Detailing the Call Display Windows**

This paragraph describes the Impact Call display windows.

#### ***Active Calls***

The Impact Call window shows you the following:

- all current calls, both active and on hold,
- the line or extension that a call is on, and whether the call is alerting, connected, on hold, conferenced, etc.

Pressing **Enter** or clicking on the **Answer** icon will connect you to whichever call is highlighted. If several calls are ringing at once—for example incoming lines and recalls from hold or park—highlight whichever call you want to answer and press **Enter**.

#### ***Call History***

Double-clicking on the **Call History** icon displays a call history log that contains a detailed listing of the calls you have made. Double-clicking on a call displayed in the log will redial that call.

## Active Call Display Window

The Active Call window shows the currently active call. The Active Call window is always visible when Impact Call is active. You cannot re-size the window to hide the identity of the call.

The Active Call window shows these following details:

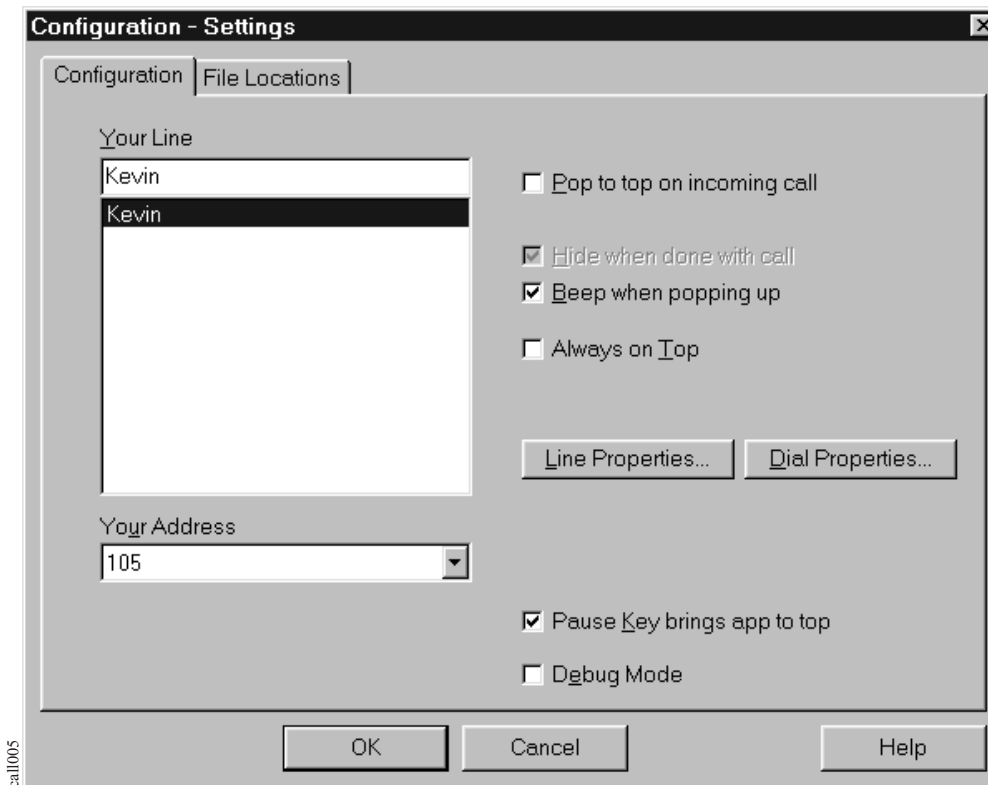
- the line or extension the call is on, and whether the call is ringing, connected, on hold, conferenced, etc.,
- any call ID tag set by you, another Impact Call user, an Impact Attendant user, or an Impact Group user on the same system,
- information from your personal directory.

## 1.6 Setting The System Configurations

The configuration settings available from the Options menu allow you to enter your station extension and customize several system settings.

### Pop To Top On Incoming Call

When you check this option, Impact Call automatically comes to the top on your display when you receive a call.



***Hide When Done With Call***

When you check this option, Impact Call automatically returns to the background when you are finished with a call.

***Beep When Popping Up***

When you check this option, the computer beeps whenever Impact Call comes to the top of your display.

***Always on Top***

Selecting this option prevents any other window from appearing on top of the Impact Call window.

***Your Address***

Select which line you want to use.

***Debug Mode***

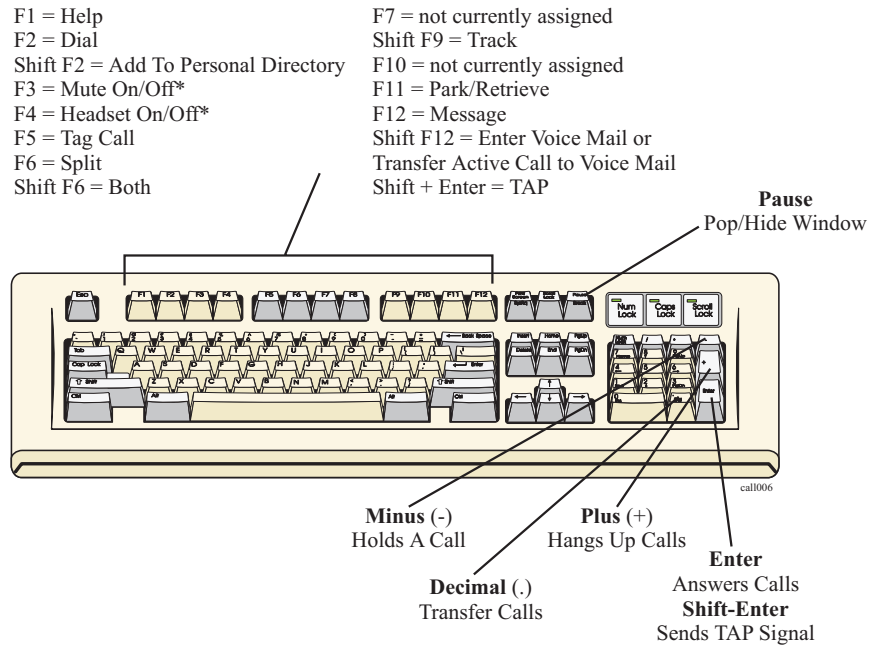
Should problems occur during Impact Call operation, the installer can use the Debug Mode to find a solution. *Do not use this feature during normal operation* as the software runs slower while it is active.

## 1.7 Using The Keyboard

The keyboard gives you access to most Impact Call functions.

Typing a person's name automatically highlights their telephone icon.

### Function Keys



\*If you are using Impact Call for PCIU, these functions require feature buttons on the telephone.

## 1.8 Using The Mouse

You can use the mouse to perform most of the actions available from the keyboard.

Mouse Action	Result
Double click your station when it is on-hook.	Places your station in do-not-disturb mode.
Double-click the <i>Notes</i> line.	Shows history of messages sent by other Comdial applications.

***This page remains blank intentionally.***



## Using Impact Call

This section is broken down into two parts. The first part is basic call handling and the second part describes special-purpose Impact Call features.

### 2.1 Answering Calls

**To answer calls ringing at your telephone, do one of the following:**

- Press the **Answer** key (Enter key) on the keyboard.
- Click the **Answer** button on the toolbar.
- Right-click the call you want to answer and select **Answer** from the dialog box.
- Use the Call task menu and select **Answer**.
- Press **Alt-C** then press **A**.

***NOTE:** The system automatically places a currently active call at your station on hold when you answer a new call.*

## 2.2 Holding Calls

To place the current active call on hold, do one of the following:

- Press the **Hold/Retrieve** key (Minus key).
- Click the **Hold/Retrieve** button on the toolbar.
- Right-click the call you wish to hold and select **Hold** from the dialog box.
- Use the Call task menu and select **Hold**.
- Press **Alt-C** then press **H**.

### 2.2.1 Retrieving Held Calls

To retrieve a call from hold, highlight the call and use one of the following methods to retrieve the call:

- Press the **Hold/Retrieve** key (minus key).
- Click the **Hold/Retrieve** button on the toolbar.
- Right-click the call you wish to take off hold and select **Retrieve** from the dialog box.
- From the Call task menu, select **Retrieve**.
- Press **Alt-C** then press **R**.

### 2.2.2 Using The Split Feature

Use the Split Feature to toggle between to held calls.

To use the split feature,

1. Press **Split** key (F6) to replace the currently active call with the call on hold
2. Press **Split** again to reverse the locations of the calls.

## 2.3 Parking and Retrieving Parked Calls

The park orbit display shows parked stations and who parked them. If you retrieve a parked call while you have an active call, the active call automatically goes on hold. The system selects the first available park orbit for use when you park a call; however, you can select any available park orbit if you wish. When you retrieve a parked call, the system chooses the first call that you can retrieve.

- To park a call in orbit, press the **Park** key (F11) to open the Park and Retrieve dialog box.



## **2.4 Transferring Calls**

You can transfer an active call to another station in either a supervised or unsupervised manner. (With a supervised transfer, you remain on the line to announce the transferred call to the new station. With an unsupervised transfer, you hang up as soon as you complete the transfer.)

Using the Transfer dialog box from the Call task menu you can create transfer arrangements by selecting numbers from the overall list or a personal directory.

**To transfer a call, do one of the following:**

- Press the **Transfer** key (Decimal key) on the keyboard.
- Click the **Transfer** button on the toolbar.
- From the Call task menu, select **Transfer**.
- Press **Alt-C** then press **T**.

When the Select a Number dialog appears, select either the Local Directory tab or the Personal Directory tab. If you want the transfer to be supervised, click the Supervised box. Now, double-click on the phone you wish to transfer the call to.

### **2.4.1 Making Voice Mail Transfers\***

You can transfer calls directly to voice mail boxes. While Impact Call selects a voice mail box for use, you use the dialog box to select numbers from the overall list, different groups, or a personal directory. Use either method shown below to make a voice mail transfer:

**To make a voice mail transfer, do one of the following:**

- Use the keyboard's **Voice Mail** key (SHIFT + F12).
- Click the **Voice Mail** button on the toolbar.

*\*If you are using the Impact Call for PCIU, you must have a voice mail transfer button programmed on your telephone for this feature to work.*

## **2.5 Conferencing Calls**

Impact Call lets you establish supervised or unsupervised conference calls between your station and other system stations. (With a supervised conference, you remain in the conference, with an unsupervised conference you drop out of the conference.)

Using the Conference dialog box from the Call task menu, create conference arrangements by selecting numbers from the overall list, different groups, or a personal directory.

The dialog shows which stations are busy.

**To set up a conference call, do one of the following:**

- Press the **Conference** key (F8).
- Click the **Conference** button on the toolbar.
- From the Call task menu, select **Conference**.
- Press **Alt-C** then press **C**.

## **2.6 Dialing Calls**

To dial a call,

1. Click the **Dial** key on the toolbar.
2. Select either the Local Directory or Personal Directory tab. Clicking once on a number or name will place the selection in the *Select who to call* area. Double-clicking on the selection will dial the call.

### **2.6.1 Hanging Up Calls**

To hang up calls at your station, do one of the following,

- Press the **Hang-up** key (Plus key).
- Click the **Hang-up** button on the toolbar.
- From the Call task menu select **Hang-up**.
- Press **Alt-C** then **U**.
- Right-click on your station's icon.

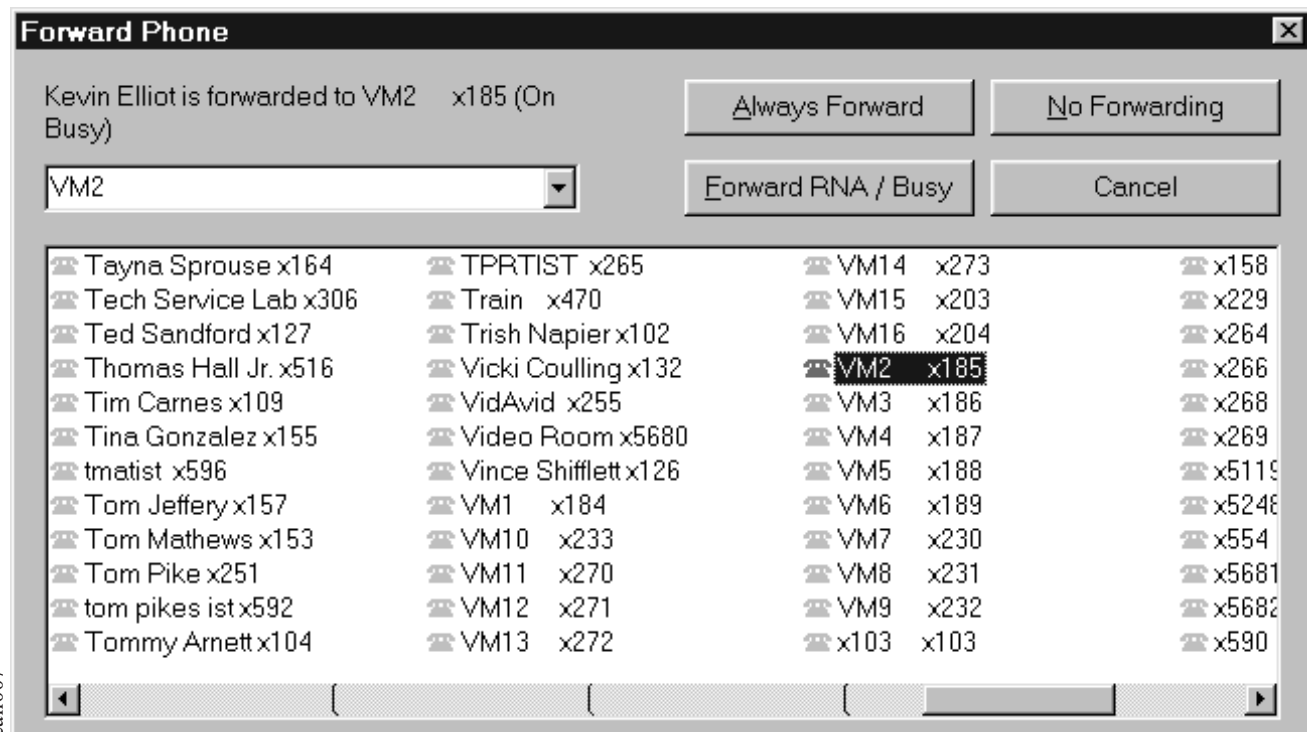
## 2.6.2 Forwarding Calls

Use Impact Call to forward calls to another station. The Call Forwarding feature has the following options:

- *Always Forward* allows call forwarding for every call that the system routes to the station.
- *Forward Ring No Answer* allows call forwarding for just the calls that ring at the station and receive no answer.
- *No Forwarding* (the default setting) disables call forwarding. You can exercise the call forwarding feature for your station as well as for any other station in the system.

To set call forwarding, use either of following methods,

1. From the Call Task menu, select **Forward**.  
OR  
Press **ALT-C** and then **F**.  
The Forward Phone dialog appears.
2. Use the Forward Phone dialog to choose the type of forwarding and the station to receive the forwarded calls.

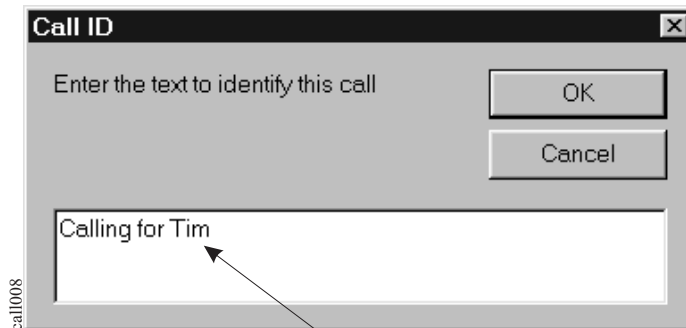


## 2.7 Tagging Calls

Tagging a call allows you to type a brief description of a call that will appear in the Active Calls dialog whenever the call is highlighted or when it recalls from hold or transfer. It also appears as a description in the Call History dialog.

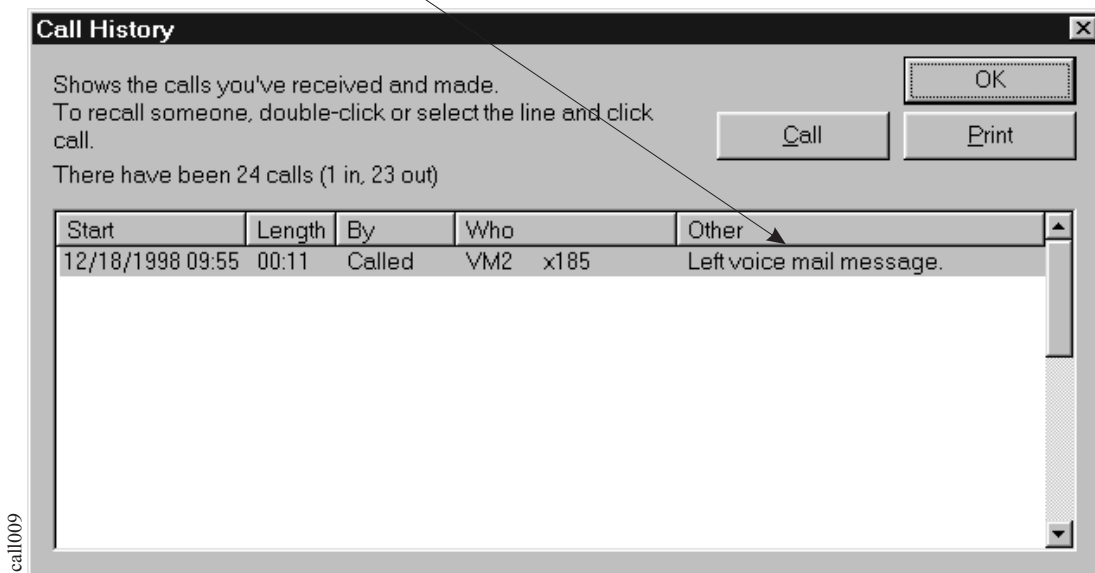
**To tag a call,**

1. While you are on a call, press **F5**. The Call ID dialog appears.
2. Type a call description and click **OK**. The call description will now appear in the Call History dialog.



Type a call description.

The description appears in the Call History dialog.



## **2.8 Selecting The Station Operating Conditions**

This section describes the settings and modes you can set on your telephone.

### ***Silent***

The Silent key lets you turn off the ringer at your station for the currently ringing call. The ringer will operate normally during the next call.

#### **To silence the ringer,**

- Press the **Silent** key (Accent key).

### ***Do Not Disturb***

When a telephone is in Do Not Disturb mode, the telephone icon has a slashed red circle over it.

#### **To place your station in do not disturb,**

- From the Call task menu select Do Not Disturb.  
—OR—
- Double-click your station icon in the current calls window.

### ***Mute\****

Prevents the other party from hearing anything from your telephone. The status of the mute feature is shown at the bottom on the screen.

#### **To toggle the mute condition either on or off at your station,**

- Press the **Mute** key (F3 key) on the keyboard.

*\*If you are using Impact Call for PCIU, you must have a Mute button programmed on your telephone for this feature to work.*

### ***Headset Operation\****

The status line at the bottom of the screen details whether your station is in the Headset or Handset operating mode.

#### **To toggle between Headset and Handset operation at your station,**

- Press the **Headset** key (F4 key).

*\*If you are using Impact Call for PCIU, you must have a headset button programmed on your telephone for this feature to work.*

### ***Volume Control***

There are two ways to adjust the volume of handset, speaker, ringer, and music outputs for your station:

- From the Programming menu select **Volume**.  
—OR—
- Press **Alt-P** then **V**.

Both actions open the Phone Volume dialog box. From this box, click on the slider bars and drag them to the volume settings you want. Once you adjust the settings, click **OK** to accept them. If you change volume settings while on a call, the settings will not take effect until the call is over.

## 2.8.1 Making A Personal Directory

Impact Call permits you to build and maintain a personal directory that contains calling information that is personal to your needs. Enter the calling information of those who you frequently call and have the directory available for your later use.

The personal directory provides a directly available call feature or you can reach the directory from the main menu by dropping down the call menu, clicking dial selection and opening the personal directory from there.

**To build or edit the Personal Directory do one of the following:**

- From the Programming task menu, select **Personal Directory**.

—OR—

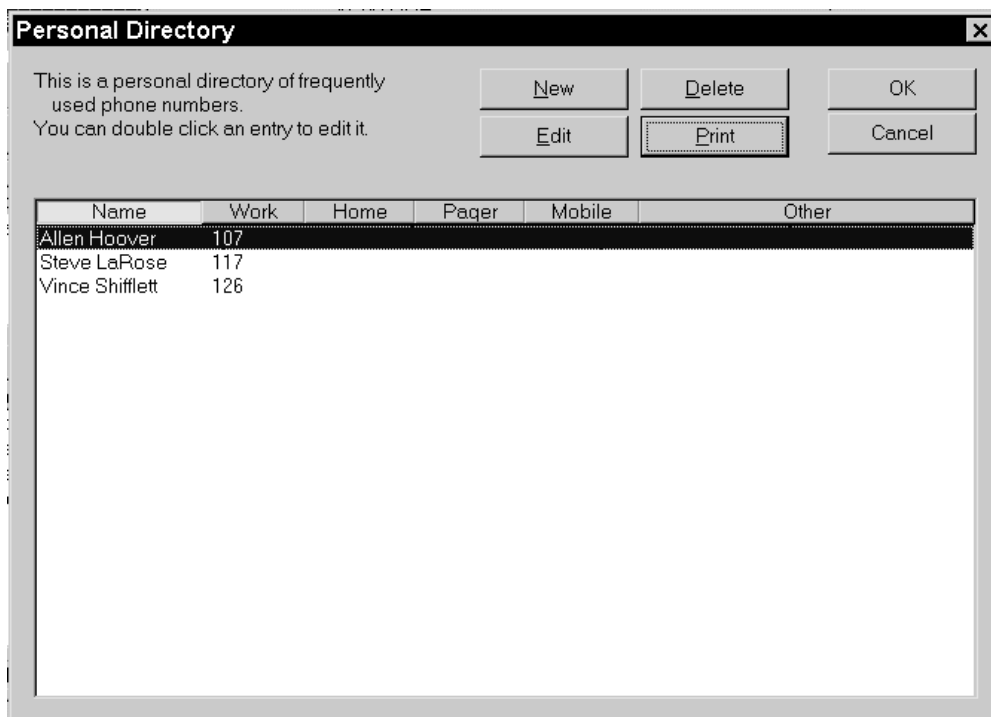
- Press **Alt-C** then **P**.

**There are several ways to edit information in the Personal Directory dialog:**

- Click **New**, type new information in the entry windows, and click **OK**.
- Click **Edit** to modify existing information, and click **OK**.
- Click **Delete** to eliminate calling information you no longer need, and click **OK**.
- Repeat the adds, edits, and deletes until the directory is complete, and click **OK**.

—OR—

- Click **Print** to print a hard copy of the personal directory, and click **OK**.



per\_dir.cdr

## 2.8.2 Sending Messages\*

The Text Message window allows you to send messages to a station's display, light a station's message waiting light, or do both. You can also choose the type of response you will receive from a station user after he or she reads the message. These response choices include: *none*, *yes/no*, or *take message or hold*.

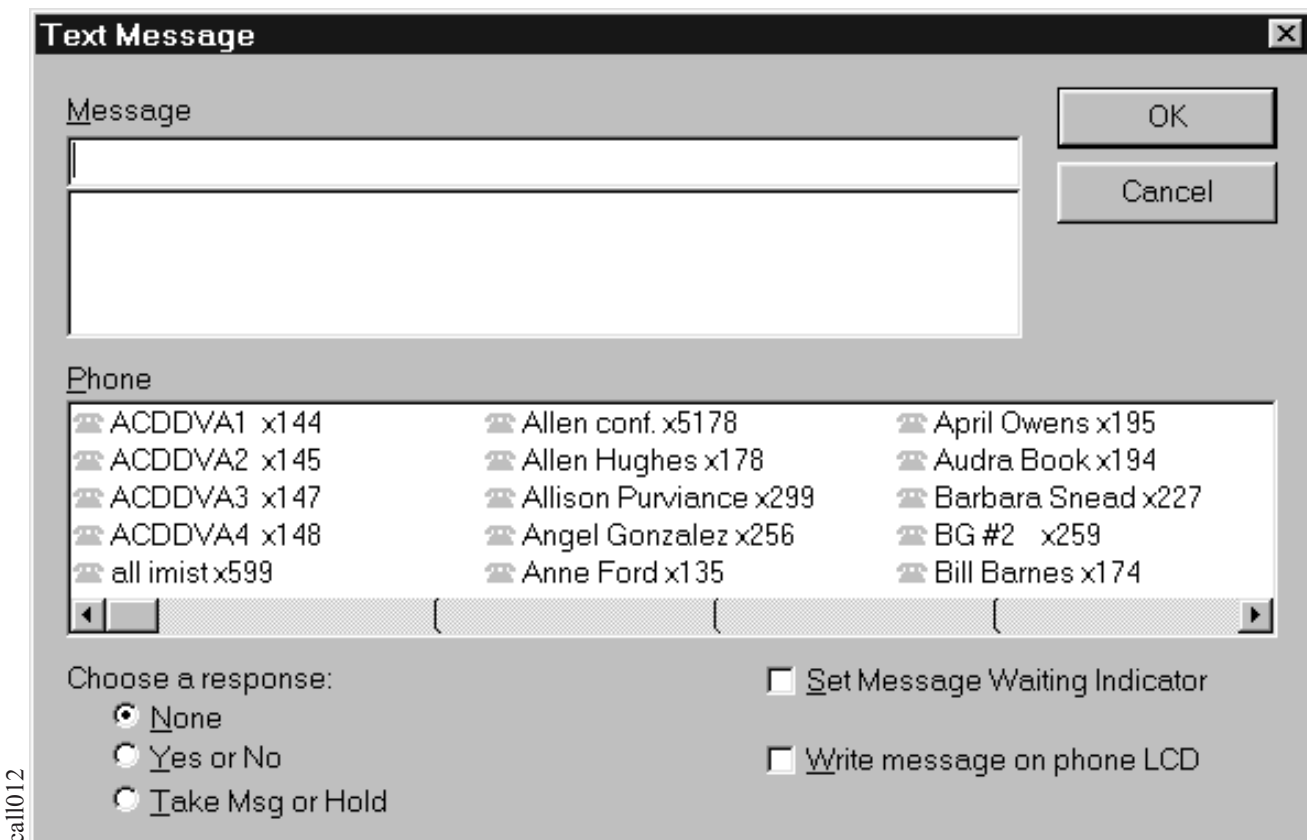
In addition to sending text messages to stations, you can send messages to other CTI applications on the system, and receive their replies on your screen.

A text message to a large-screen telephone can be up to 120 characters. A text message to a 2-line display telephone can be up to 32 characters.

\*This feature is unavailable on Impact Call for PCIU.

### To send a message,

1. From the Options drop-down, select **Message**.
2. Select the phone you want to send a message to.
3. If you type a message, make sure the Write Message to LCD box is checked.  
You can also set a message-waiting light on the recipient's telephone, and choose the response options the recipient will have.
4. Click **OK** when you are done.



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### **2.8.3 Using The Tracker Pager**

If your system has QuikTrack, you can page anyone who has a Comdial pager. You have a choice of how you send the track message:

- Send the Tracker message as soon as you prepare it by clicking **Track**.
- OR—
- Schedule a later time for Impact Call to send the Tracker message by:
  - (a) Clicking the **Schedule Track** button.
  - (b) Entering the time for the track to occur in the Schedule Track menu.
  - (c) Clicking **OK**.

Should someone track you, read the Tracker message like an e-mail message by selecting the New Tracks entry on the Current Calls window. You view past tracks by double-clicking the Track line within the current calls list.

Impact Call provides several different methods for opening the Tracker window:

- Use the **Tracker** key (SHIFT + F9).
- Click the **Tracker** button on the toolbar.
- Right-click the name of the person on the Stations and Lines display you want to track and select **Pager**.
- From the Options task menu, select **Track**.
- OR—
- Press **Alt-O** then **T**.



## 2.8.4 Configuring Action Events

Impact Call lets you determine how you want the system to handle telephone calls that you make or receive. For example, you could arrange for an application to open a customer profile database whenever you answer an incoming call. (This is referred to as a *screen pop*.)

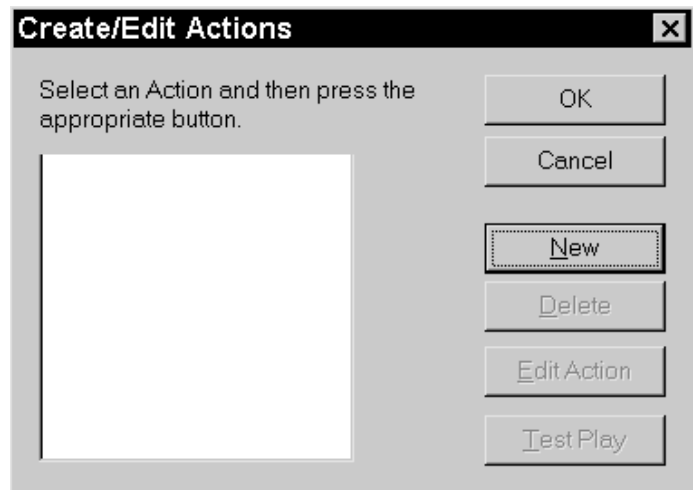
Configuring event actions consists of the following tasks:

- Creating new actions.
- Building macros.
- Assigning actions.

### Creating Actions

To create or edit actions,

1. From the Actions drop-down, select Create/Edit Actions. The Create/Edit Actions dialog appears.
2. If actions and applications already exist, you can click Edit **Action** or Delete.
3. Begin the process of creating a new action by clicking the **New** button. Complete the task by entering the requested information to create the macro you want (see the paragraph below titled, *Building The Macros*).



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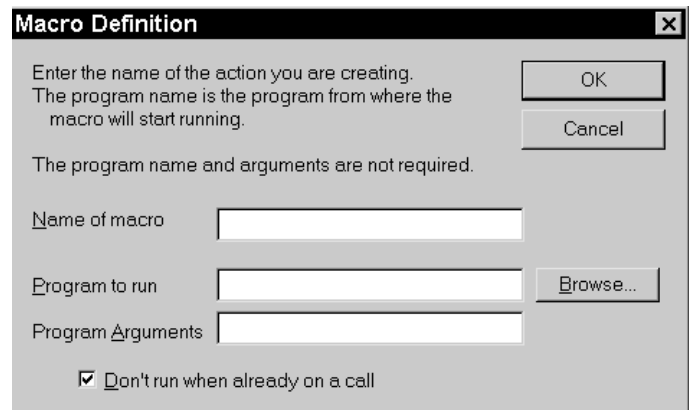
## Building The Macros

Impact Call uses keyboard macros to execute call event actions. A macro is a list of instructions that execute certain functions when the assigned call event occurs. Impact Call includes macros that it follows when executing standard applications; however, you can build custom macros by recording the keystrokes it takes to perform an action.

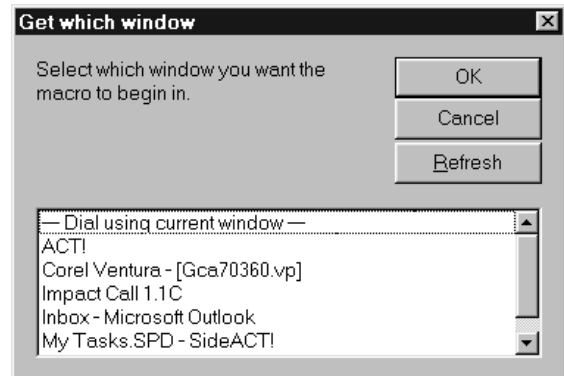
**NOTE:** *When recording a macro, you must use the keyboard to perform the actions you want to record. You should know how to use the keyboard to start an application, locate a database, and search that database.*

### To build a macro,

1. From the Actions drop-down, select **Create/Edit Actions**. The Create/Edit Actions dialog appears.
2. Click the **New** button to open the Macro Definition menu.
3. In the Macro Definitions menu:
  - (a) Enter the name for the new macro.
  - (b) Specify if you do not want your new application to run when you are already on a call.
  - (c) (optional) Browse for an existing application, click on it, and add any needed program arguments.
  - (d) Click **OK** to open the Get Which Window menu.
4. In the Get Which Window menu, select the window you wish to be in when you start recording the macro. (For example, if your macro involves opening a particular database program when a certain call event occurs, you need to specify that window here.)  
If the call event for which you are composing a macro involves dialing an outbound call, click the *Dial using current window* selection.  
If the window you need is not listed,
  - (a) Start the application you need.
  - (b) Minimize it.
  - (c) Click the Refresh button to update the list of available windows.
  - (d) Click on the window you need.



macro.cdr



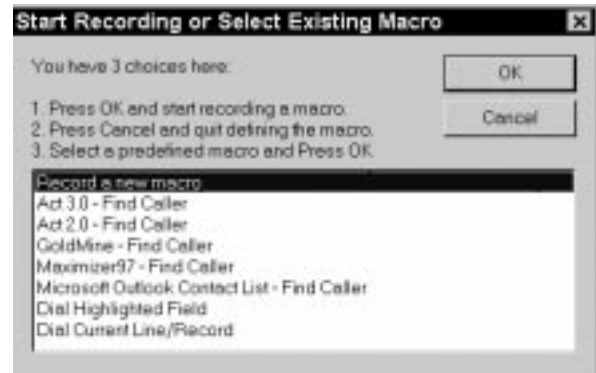
get\_win

## Recording The Keystrokes

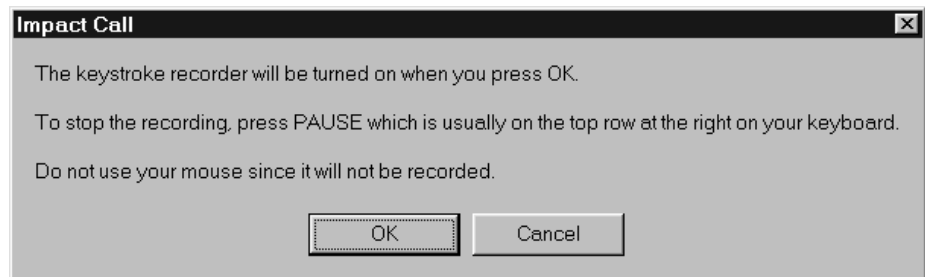
- Click **OK** to create the macro for this action.

**NOTE:** Before you start, review the keystrokes in your mind or write them down.

- From the Start Recording or Select Existing Macro dialog, you have several choices:
  - Press **Cancel** and quit defining the macro.
  - Select a predefined macro from the displayed list and click **OK**. (Impact Call has keystrokes already stored for several common client applications and you need do nothing more than select the application to complete the recording process.)
  - Click the *Record a new macro* selection, and press **OK** to turn on the keystroke recorder. The application you are recording in will maximize. Make sure it is the active application by clicking on the title bar, and then begin recording your keystrokes.



start.ldr



ick

- When you are ready to insert a telephone number that you wish to search for, press the **Pause** key. The Action Recording menu appears. Select whichever option you want and click **OK**. (If you are searching for a telephone number, be sure to select one of the telephone number formats at the bottom of the menu.)
- When you have finished recording, press the **Pause** key again. Choose **End Recording** from the Action Recording menu and click **OK**.



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## Testing Macros

To test a macro, open the Create/Edit Actions dialog, select the macro you wish to test, and click **Test Play**.

## Assigning Actions

After creating new actions and building their accompanying macros, assign these applications or actions to the call events in the following manner:

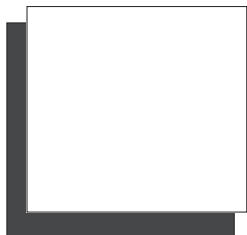
1. From the main menu, click **Action** from the task menu list. The Action Assignments screen appears.
2. Click the down arrow next to a call event that you want to associate with an action. A list of actions appears.
3. From the list of actions click the desired item.
4. Click the box next to the caller ID statement to check or uncheck its control (the statement only affects outside calling—if checked, *Call from Outside* and *Answer from Outside* will be triggered only if caller ID is active).
5. Assign an action as an outgoing macro and specify a key that you can type to activate the action. You may find this feature useful for automatically dialing a number at any time regardless of what application is active.
6. Click **OK** to accept the action assignments.

Assign an action to each event.  
You create new actions by pressing the Actions button.

Ring from Inside	(none)	<input checked="" type="checkbox"/> Only if Caller ID present  Highlight the Hot Key box and press the key that will activate the outbound macro. Hot Key <input type="text" value="F7"/>
Ring from Outside	(none)	
Answer Inside Call	(none)	
Answer Outside Call	(none)	
Make Inside Call	(none)	
Make Outside Call	(none)	
End Inside Call	(none)	
End Outside Call	(none)	
Outbound Macro	(none)	

OK  
Cancel  
Actions

action



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