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NORTEL NORSTAR



Norstar Personal Call Manager User Guide



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Personal Call Manager

Personal Call Manager is a TAPI-based (Telephony Application Programming Interface) application which provides an easy to use PC (personal computer) interface for your telephone.

With Personal Call Manager you can:

- make calls
- redial telephone numbers
- return calls
- answer calls
- put calls on and off hold
- manage multiple calls
- transfer calls
- conference calls
- activate and de-activate Do Not Disturb
- call forward your telephone

Personal Call Manager also has an Address Book which allows you to store the names, addresses, and telephone numbers of your contacts on your PC where they are easy to find and use.

Using a handsfree telephone with Personal Call Manager

Personal Call Manager is a tool designed to accompany your telephone. It provides tools to make processing calls easier, but you must still use your telephone to speak with the caller. For this reason, we recommend that you use a telephone equipped with handsfree. When using a handsfree telephone, you can perform all of the Personal Call Manager functions without picking up the telephone handset.


About this guide

Personal Call Manager provides several ways to perform each task. Although this document describes all of the possible methods, you only need to use one of the methods to perform the task.

Starting Personal Call Manager

You can start Personal Call Manager from the short cut icon on the desktop or from the Windows Start button.

To start Personal Call Manager from the short cut icon:

1. Double click  .

To start Personal Call Manager using the Start button:

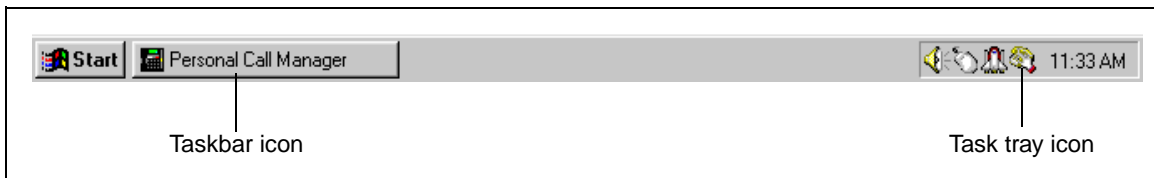
1. Click the **Start** button and point to the **Programs** menu item.
2. Point to the **Personal Call Manager** menu item.
3. Click the **Personal Call Manager** menu item.

The Personal Call Manager introduction screen appears briefly. The Personal Call Manager icon is added to the task tray and task bar, and the Personal Call Manager main window appears.

Note: When you install Personal Call Manager, the short cut icon is installed by default.

Personal Call Manager icons

When Personal Call Manager starts up, two icons are added to the screen: the taskbar icon and the task tray icon. These two icons have distinctly different tasks. The taskbar icon is used to open the Personal Call Manager main window. The task tray icon provides access to Personal Call Manager functions when you are using another program. The diagram below shows where each of these icons are located.



Personal Call Manager task tray icon

The Personal Call Manager icon  appears on the right side of the task tray.

When you let the mouse pointer hover over the Personal Call Manager icon, the number of current calls is displayed. The number displayed includes, the active call, conference calls and calls on hold.

When you right click the Personal Call Manager icon, a menu appears that allows you to exit from Personal Call Manager, set Personal Call Manager options, or open the Personal Call Manager main window. The Personal Call Manager main window provides access to additional features such as the Address Book.






When you single click the Personal Call Manager icon, the task tray menu appears. From the task tray menu you can perform most basic call functions, such as making and answering calls, putting calls on hold, transferring calls and conferencing two calls together.

Personal Call Manager task tray menu

The Personal Call Manager task tray menu is divided into two main sections. The lower portion of the menu contains the following call control options:

- **Callers List** - a list of the telephone numbers of the last ten people who called
- **Redial List** - a list of the last ten telephone numbers you dialed
- **Quick Dials** - a group of telephone numbers you want quick access to
- **Transfer** - allows you to transfer the active call to another telephone
- **Manual Dial** - allows you to call someone by entering their telephone number on the PC keyboard
- **DND** - turns the Do Not Disturb feature on or off

The upper portion of the menu contains the current calls. Each of these calls has an icon beside it to indicate the status of the call. If there are currently no calls, the upper portion of the menu does not appear.

| | | |
|---|-----------------|---|
|  | Active Call | Appears beside the call you are currently on. |
|  | Held Call | Appears beside calls that are on hold. Any call that is not active will be on hold. |
|  | Conference Call | Appears beside the two calls that you are connected to when you are on a conference call. |
|  | Held Conference | Appears beside conference calls that are on hold. |
|  | Ringing | Appears beside the calls that are currently ringing. |

Personal Call Manager Main Window

From the main window you can perform all of the functions of the Personal Call Manager task tray icon as well as access the Address Book, the Help files and Personal Call Manager setup.

Opening the main window

When you start Personal Call Manager, the main window appears. If you do not want the main window to appear when you start Personal Call Manager, refer to “[Changing the Startup Option](#)” on page 82. When you change this option, the main window is minimized to an icon on the taskbar when you start Personal Call Manager. You can also minimize the main window at anytime by clicking on the minimize button in the top right corner of the window.

To maximize the main window:

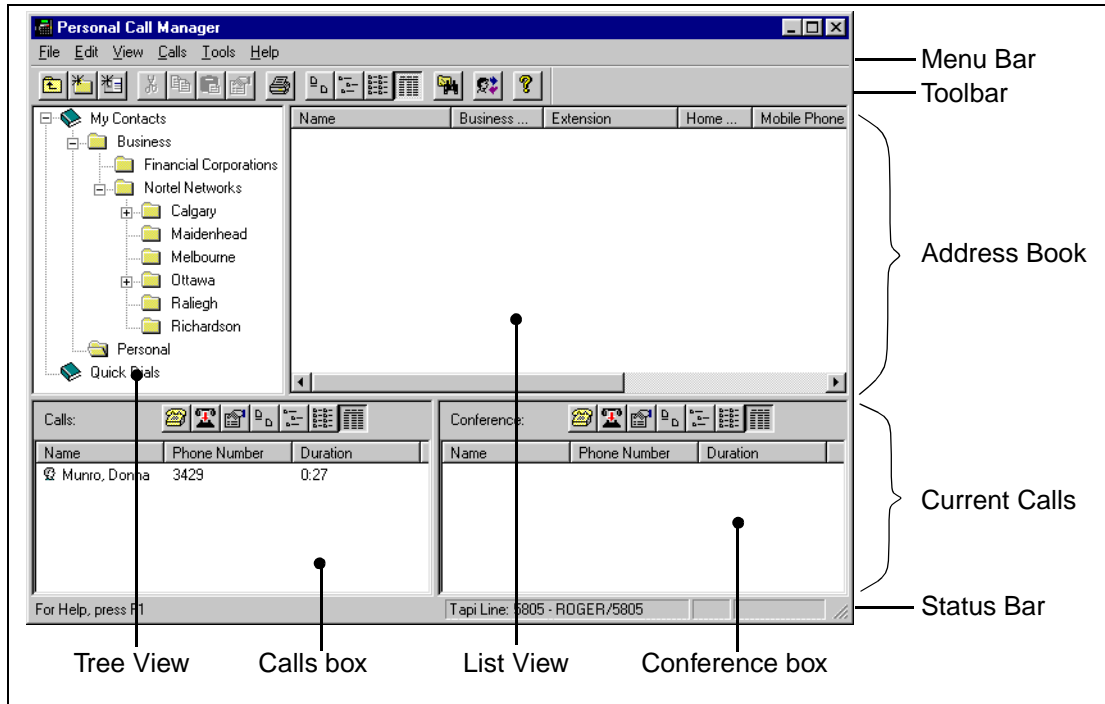
- click the Personal Call Manager icon in the taskbar
- OR
- right click the Personal Call Manager icon in the task tray and then click the **Open** menu item.

Components of the main window

The Personal Call Manager main window shows the following:

- the menu bar
- the toolbar
- the address book
- the current calls
- the status bar

All of these components, except the Menu bar, can be turned on or off to suit your needs.



Menu bar

The menu bar shows the menus available from the main window. From these menus you can access all of the features available from Personal Call Manager. The menu bar is always visible on the main window.

One of the menus on the menu bar is the Calls menu. The items on the Calls menu are identical to the items on the Personal Call Manager task tray menu.

Toolbar

The toolbar contains several buttons that provide quick and easy access to Personal Call Manager functions.

Displaying the toolbar
















To display the toolbar:

1. Click the **View** menu.
2. Click the **Toolbar** menu item.

The toolbar toggles between being displayed and not being displayed. When the toolbar is set to be displayed, ✓ appears beside the **Toolbar** menu item in the **View** menu.

Using the toolbar

The toolbar buttons provide access to commonly used features.

| | | |
|---|--------------|--|
|  | Up One Level | Exits from the current directory and moves one level up in the contact tree. |
|  | New Folder | Adds a new folder to the Address Book. |
|  | New Contact | Adds a new contact to the Address Book. |
|  | Cut | Copies the selected folder or contact into the clipboard and then deletes it. |
|  | Copy | Copies the selected folder or contact into the clipboard. |
|  | Paste | Copies the folder or contact stored in the clipboard to the selected folder. |
|  | Properties | Displays the Address Properties dialog box if a contact is selected or the Folder Property dialog box if a folder is selected. |
|  | Print | Prints information about the currently selected contact. If a folder is selected, prints information about all of the contacts in the folder. |
|  | Large Icons | Displays the folders and contacts in the Address Book in large icons. |
|  | Small Icons | Displays the folders and contacts in the Address Book in small icons. |
|  | List | Displays the folders and contacts in the Address Book in small icons organized in vertical columns. |
|  | Detail | Displays the folders and contacts in the Address Book in a report view format. In this format the icon, first name, last name, telephone numbers, and email information of the contact is shown. |
|  | Find Person | Displays the Search dialog box. The Search dialog box is used to find a particular contact within the Address Book. |
|  | Calls Log | Displays the Calls Log Window. This window shows all of the calls made or received while Personal Call Manager was operating. |
|  | About | Displays a dialog box containing information about the Personal Call Manager software such as the software version. |

Address Book

The Address Book is a list of all the contacts stored in Personal Call Manager. The Address Book consists of two parts:

- the Tree View which shows the structure of your folders
- the List View which shows the folders and contacts stored in the currently selected folder

For more information about the Address Book, refer to “[Address Book](#)” on page 51.

Displaying the Address Book

To display the Address Book:

1. Click the **View** menu.
2. Click the **Only Address Book** menu item to display only the Address Book.

OR

Click the **Both Address Book and Calls** menu item to display both the Address Book and the Current Calls.

The symbol • appears beside the current selection.

Current Calls

The Current Calls section of the screen shows which calls are active. The Current Calls section consists of two parts:

- the Calls box which shows the calls that are currently on your telephone
- the Conference box which shows the conference calls that are currently on your telephone.

Displaying the Current Calls

To display the Current Calls:

1. Click the **View** menu.
2. Click the **Only Calls** menu item to display only the Current Calls.






OR

Click the **Both Address Book and Calls** menu item to display both the Address Book and the Current Calls.

The symbol • appears beside the current selection.








Current Calls icons

There are several icons that are used in the Current Calls section. Each icon is used to represent a call. The icons also show the status of the calls.

| | | |
|---|-----------------|---|
|  | Active Call | Appears beside the call you are currently on. |
|  | Held Call | Appears beside calls that are on hold. Any call that is not active will be on hold. |
|  | Conference Call | Appears beside the two calls that you are connected to when you are on a conference call. |
|  | Held Conference | Appears beside conference calls that are on hold. |
|  | Ringing | Appears beside the calls that are currently ringing. |

Current Calls Toolbar

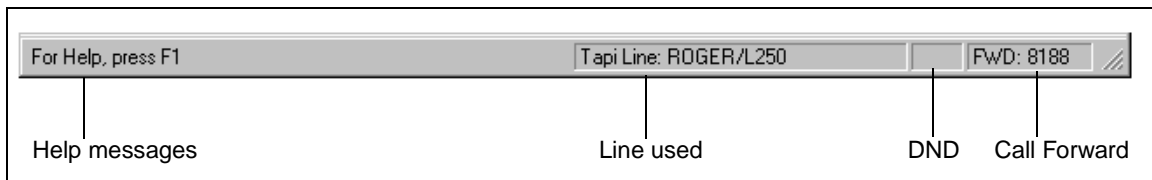
Above the Calls box and the Conference box are toolbars that you use to change how the calls are displayed.

| | | |
|---|-------------|--|
|  | Manual Dial | Displays the Dial dialog box. This dialog box allows you to call someone who is not in the Address Book. |
|  | Release | Hangs up the selected call. If only there is only one call, that call is automatically selected. |
|  | Large Icons | Displays the current calls or conference calls in large icons. |
|  | Small Icons | Displays the current calls or conference calls in small icons. |
|  | List | Displays the current calls or conference calls in small icons organized in vertical columns. |
|  | Detail | Displays the current calls or conference calls in a report view format. In this format the icon, the callers name, the telephone number and the call duration is shown. The duration is a running count of how many minutes the call has been connected. |
|  | Properties | Displays the Notes tab of the Address Properties dialog box for the selected call. If the selected call is not in the Address book, a dialog box appears asking if you want to add this caller. |

Status bar

The Status bar is at the bottom of the screen and provides four information message areas:

- Help messages – Shows a help message, if available, for the area the mouse is pointing at. For example, if the mouse is pointing to one of the buttons on the toolbar, the message describes what the button does.
- Line used – Identifies which telephone line is being used by Personal Call Manager.
- DND – The acronym DND appears if the Do Not Disturb (DND) feature is turned on for your telephone.
- Call Forward – Indicates if Call Forward is activated, and to which number your telephone is call forwarded.



Displaying the Status bar

To display the Status bar:

1. Click the **View** menu.
2. Click the **Status Bar** menu item.
The Status bar toggles between being displayed and not being displayed. When the Status bar is set to be displayed, ✓ appears beside the Status Bar menu item.

Closing the main window

To close the main window, click the minimize button in the top right corner of the window. The main window is minimized to an icon on the taskbar.

When you close the main window, call control features are still available from the Personal Call Manager icon in the task tray.

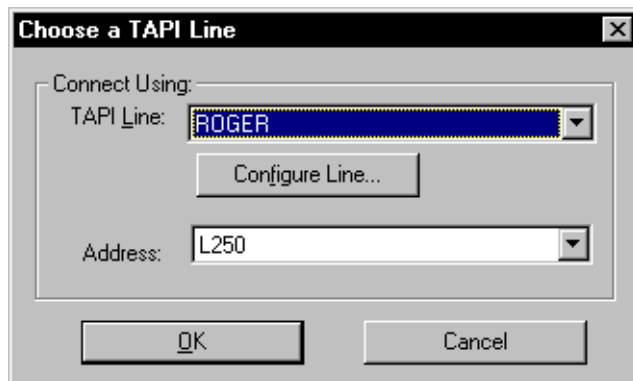
Setting up Personal Call Manager

Before you can use Personal Call Manager you must choose the TAPI line that will be used and define the dialing properties.

Defining the line used

If there are several lines available, you can choose which line Personal Call Manager uses to make calls. To choose a line:

1. Click the **Tools** menu.
2. Click the **Dial Using** menu item.
The *Choose a TAPI Line* dialog box appears.



3. Click the drop list arrow beside the **TAPI Line** field.
4. Click the line Personal Call Manager uses.
5. Click the drop list arrow beside the **Address** field.
6. Click the address for the line you chose.
7. Click the **OK** button.

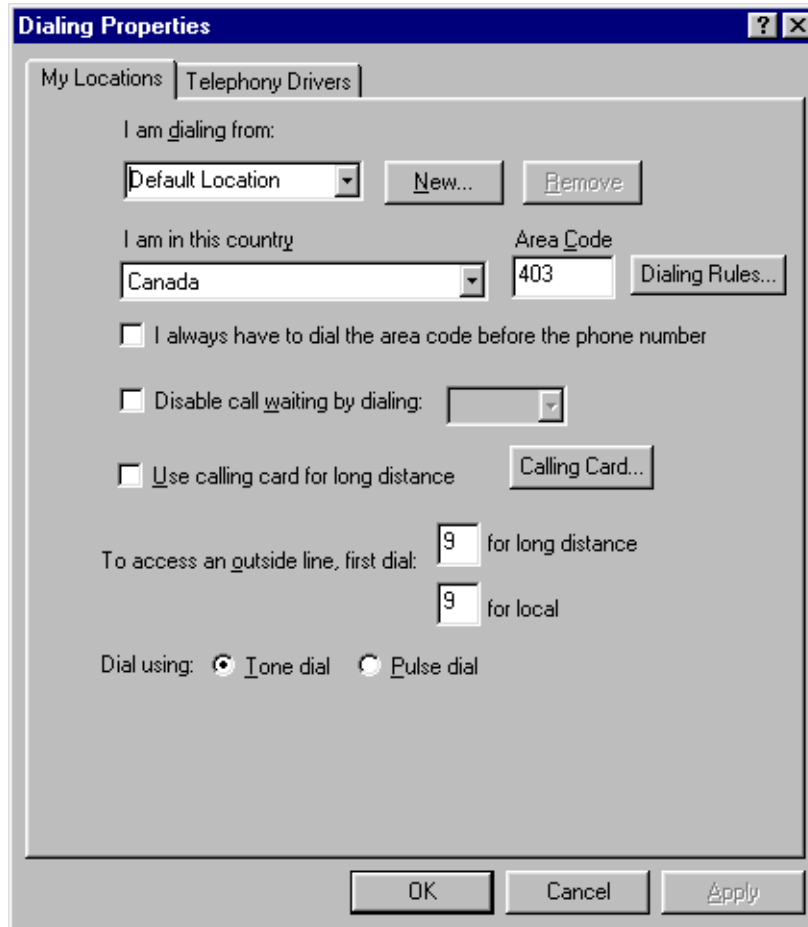
Note: When using the Norstar TAPI Service Provider, the name of the TAPI line is the same as the DN name for your telephone.

Changing the dialing properties

You use the Dialing Properties to define where you are situated and what is required to dial from this location. To access dialing properties:

1. Click the **Tools** menu.

- Click the **Dialing Properties** menu item.
The *Dialing Properties* dialog box appears.



From the *Dialing Properties* dialog box you can:

- choose the location you are dialing from (I am dialing from)
- choose the country you are in (I am in this country)
- set the area code you are dialing from (Area Code)
- choose if you are using a calling card (Use a calling card for long distance)
- set the number used to disable Call Waiting (Disable call waiting by dialing)
- set how to access lines (To access an outside lines)
- choose the type of dialing system (Dial using)

I am dialing from

The **I am dialing from** field is used to save different sets of dialing properties. It is used when you have a computer (such as a lap top) that you use at different locations. The settings for the different locations can be saved under different names in the **I am dialing from** field. You can then quickly change to the new settings when you switch locations.

For example, you may have a lap top computer that you use at both the north and south locations. If the north and south locations have different dialing requirements (such as call waiting in the north but not in the south), you can set up two different sets of dialing properties in the **I am dialing from** field. Then, when you switch locations, you can change the dialing properties by changing the name that appears in the **I am dialing from** field.

Creating a new location

When you create a new location, you are creating the name that is used to access the new set of dialing properties. After you create the location, any changes made to *Dialing Properties* dialog box are saved with this name.

To create a new location:

1. Click the **New** button.
A dialog box appears confirming that a new location was created.
2. Ensure the text in the **I am dialing from field** is highlighted.
3. Enter the name of the new location.
4. Change the other fields on the *Dialing Properties* dialog box to match the dialing properties required for this location.
These fields are described later in this section.
5. Click the **Apply** button to store the changes with the new location.

Selecting a location

When you select a location, all of the dialing properties are changed to the settings that are stored for that location. To select a location:

1. Click the drop list arrow that is on the right side of the **I am dialing from** field. A list of locations appears.
2. Click the location you are currently at.
The dialing properties are changed to the setting stored for this location.

Deleting a location

When you no longer need a location, you can delete it from the list of locations.

To delete a location:

1. Click the drop list arrow that is on the right side of the **I am dialing from** field. The list of locations appears.
2. Click the location you want to delete.
3. Click the **Remove** button.
A confirm deletion dialog box appears.
4. Click the **Yes** button.

I am in this country

This field defines the country of the you are currently in.

To select a country:

1. Click the drop list arrow beside the **I am in this country** field.
2. Scroll through the list of countries.
3. Click the country you are in.

Tip: You can scroll quickly through the list of countries by typing the first few letters of the country's name. As you type, the list will move to the country that matches the letters you type.

Area Code

The **Area Code** field defines the area code you are currently in. Personal Call Manager uses the number in this field to determine if a call is a local call (to the same area code) or a long distance call.

To enter an area code:

1. Highlight all of the characters in the **Area Code** field.
2. Type the area code.

In some locations, the area code must always be added when dialing a telephone number. To make Personal Call Manager include the area code, ensure the **I always have to dial the area code before the phone number** field contains a check mark (✓).

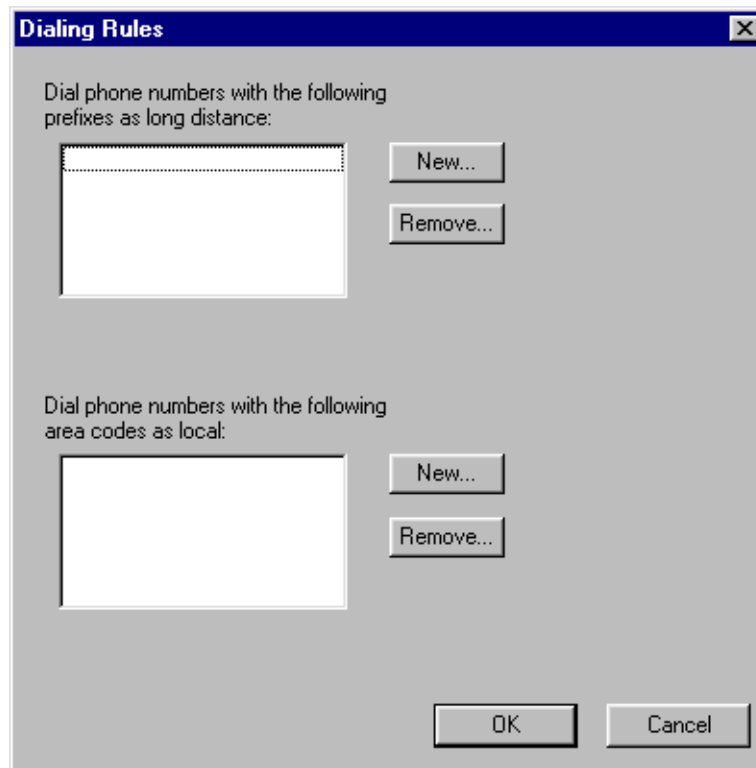
Dialing Rules

In some locations, calls within the same area code are considered long distance calls. These calls require the country code and area code (e.g. 1-403) to be added to the front of the telephone number before they are dialed.

The Dialing Rules feature allows you to define the prefixes (e.g. 222-xxxx) that are long distance calls in your area code.

To set the prefixes that are long distance:

1. Click the **Dialing Rules** button.
The *Dialing Rules* dialog box appears.



To add a prefix that is considered long distance

1. Click the **New** button located in the top half of the dialog box.
The *New Area Code and Prefix* dialog box appears.
2. Enter the prefix and click the **OK** button.

To delete a prefix that is considered long distance

1. Click the prefix you want to delete.
2. Click the **Remove** button.

To add a prefix that is considered local

1. Click the **New** button located in the bottom half of the dialog box.
The *New Area Code and Prefix* dialog box appears.
2. Enter the prefix and click the **OK** button.

To delete a prefix that is considered local

1. Click the prefix you want to delete.
2. Click the **Remove** button.

Use a calling card for long distance

Choose this field if you want to use a calling card for long distance telephone numbers. This field also lets you define which calling card you are using.

To use a calling card:

1. Ensure the **Use calling card for long distance** check box contains a check mark (✓).
If you have previously set up a calling card, the settings for that calling card are used.
If you have not set up a calling card, refer to [Setting up a calling card](#).

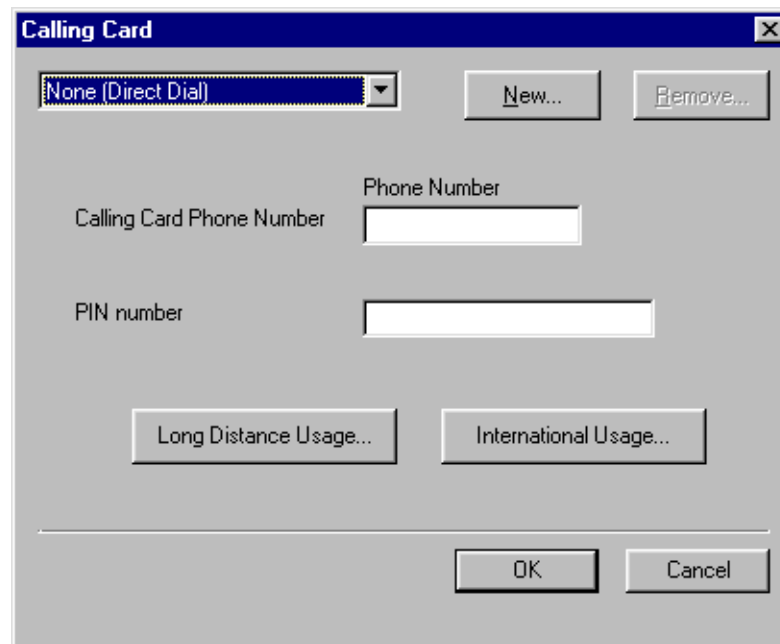
To stop using a calling card

1. Ensure the **Use calling card for long distance** check box is empty.

Setting up a calling card

You must set up the calling card parameters before you can use a calling card. To set up a calling card:

1. Click the **Calling Card** button.
The *Calling Card* dialog box appears.



2. Click the drop list box at the top of the dialog box.
3. Scroll through the list to find the calling card you are using and then click the calling card.

Note: If the calling card you are using is not on this list, refer to [Adding a custom calling card](#).

4. Click the **Calling Card Phone Number** field.

5. Enter the calling card telephone number.
6. Click the **PIN number** field.
7. Enter your calling card PIN number.
8. Click the **OK** button.

Adding a custom calling card

The dialing parameters for some calling cards are already configured in Personal Call Manager and appear in the list of calling cards. If the calling card you are using is not on the list of cards, you must set up how to use your calling card.

To add a custom calling card:

1. Click the **Calling Card** button.
The *Calling Card* dialog box appears.
2. Click the **New** button.
The *Create New Calling Card* dialog box appears.
3. Type the name of the calling card and click the **OK** button.
A dialog box appears informing you that you must set up the dialing rules for the new calling card.
4. Click the **OK** button.
5. Click the **Calling Card Phone Number** field.
6. Enter the calling card number.
7. Click the **PIN number** field.
8. Enter your calling card PIN number.

9. Click the **Long Distance Usage** button.
A second *Calling Card* dialog box appears.

10. Click the **Dial** field in the first step.
11. Choose the first set of numbers that must be dialed.
12. Click the next **Dial** field and then click the next set of numbers to be dialed.
13. Repeat step 12 until you have completed all of the steps needed to make a call using your calling card.
Note: Refer to the documentation that came with your calling card for the sequence of steps that are required with your card.
14. When all of the required steps are added, click the **OK** button.
15. Click the **International Usage** button.
16. Repeat steps 10 to 14 to add the steps required to make an international call.
17. Click the **OK** button to return to the *Dialing Properties* dialog box.

Disable call waiting by dialing

If call waiting is available for the current location, use this field to define the numbers required to disable call waiting. Your telephony application will use these numbers to disable call waiting when required.

To enter the numbers required to disable call waiting:

1. Click the **Disable call waiting by dialing** check box.
A check mark (✓) appears.
2. Click the drop list arrow beside the **Disable call waiting by dialing** field and then click the appropriate disable call waiting code.
If the appropriate code does not appear on the list, click the field and type the disable call waiting code.

To identify that call waiting is not used, ensure the **Disable call waiting by dialing** check box is empty.

To access outside lines

There are two fields for accessing outside lines. The first field is for the digits required to access local numbers and the second field is for the digits required to access long distance lines. These access numbers are required if you are using a line pool or call routing to make calls. These numbers are the same numbers you dial if you are making an outside call from your telephone.

If you do not dial an extra number (e.g. 9) when making a call from your telephone, leave these fields blank.

To change the outside line access numbers:

1. Highlight the **for long distance** field and then type the number required to access an outside line for a long distance call.
2. Highlight the **for local** field and then type the number required to access an outside line for a local call.

Dial using

Use this field to choose tone dialing signals or pulse dialing signals when making a call. To select pulse dialing, click the **Pulse dial** button. To select tone dialing, click the **Tone dial** button.

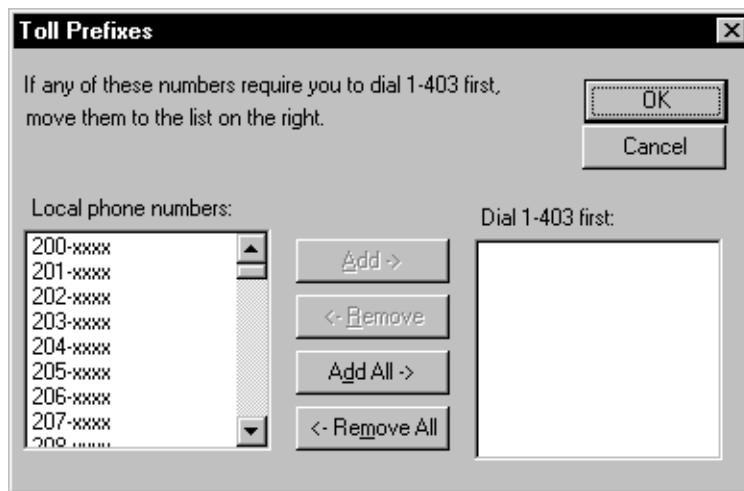
Defining long distance numbers in your area code

In some locations, calls within the same area code are considered long distance calls. These calls require the country code and area code (e.g. 1-403) to be added to the front of the telephone number before they can be dialed.

The Toll Prefixes feature allows you to define the prefixes (e.g. 222-xxxx) that are long distance calls in your area code.

To define toll prefixes:

1. Click the **Tools** menu.
2. Click the **Toll Prefixes** menu item.
The *Toll Prefixes* dialog box appears.



3. Scroll through the list of prefixes in the **Local phone numbers** field and click the prefix that requires an area code added.
4. Click the **Add->** button.
5. Repeat steps 3 and 4 for each prefix that requires an area code added.
6. **Note:** If you add a prefix to the **Dial first** field that does not require an area code, remove it by clicking on the prefix and then clicking on the **<-Remove** button.
7. When you have finished moving all of the prefixes that require an area code, click the **OK** button. The *Toll Prefixes* dialog box closes.

The Toll Prefixes feature is only available if the country you choose in the *Dialing properties* dialog box has a country code of 1. For more information about dialing properties, refer to [“Changing the dialing properties”](#) on page 16.

Making a call

Using Personal Call Manager, you can make a call using the Calls menu, the Personal Call Manager task tray menu, the toolbar, or the Address Book. When you make a call, the Ringing icon appears in the Calls box, the Personal Call Manager task tray menu, and Calls menu. When the call is answered, the icon changes to the Active Call icon. Both the Ringing and the Active icons have a label that is used to identify the call.

If you make a call using the Address Book, the name in the Address Book is used as the label for the call.

If you manually dial the telephone number, Personal Call Manager compares the number dialed to the numbers stored in the Address Book. If a match is found, the name from the Address Book is used as the label. If no match is found, the number dialed is used as the label.

Making a call using the Address Book

Before you can call a number from the Address Book, you must add the number to the Address Book. For more information about adding numbers to the Address Book, refer to [“Adding a new contact to the Address Book”](#) on page 53.

To make a call using the right mouse button:

1. Look in the Address Book to find the icon of the person you want to call.
2. Right click the icon and point to the **Dial** menu item.
3. Click the telephone number you want to dial for this person (e.g. the contact’s Business number).

You can use the drag and drop feature to make a call. To make a call using the drag and drop method:

1. Look in the Address Book to find the icon of the person you want to call.
2. Use the right mouse button to drag the icon into the Calls box.
3. Click the telephone number you want to dial for this person (e.g. the contact’s Business number).

To call the prime telephone number using the Address Book:

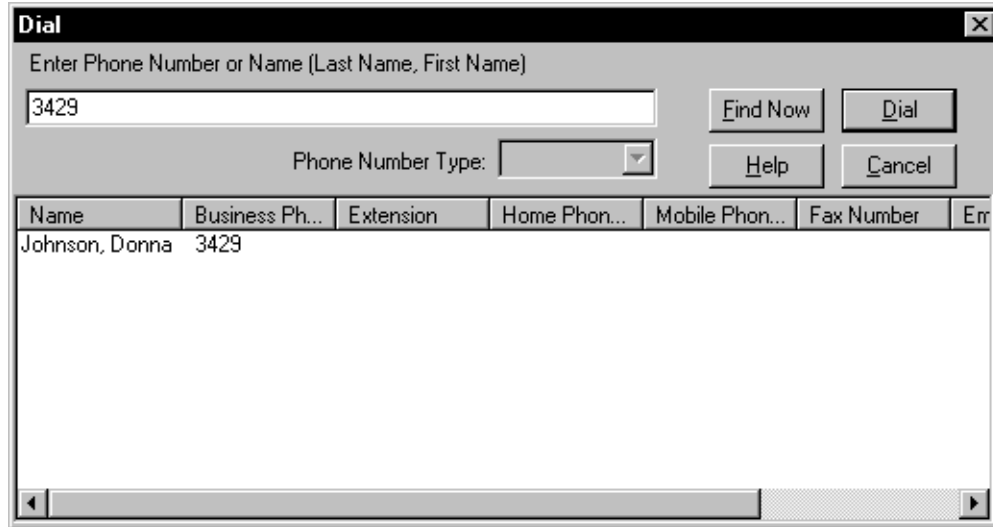
1. Look in the Address Book to find the icon of the person you want to call.
2. Make the call by double clicking on the icon or dragging the icon to the Calls box.

Note: When you add a contact, you define one of the telephone numbers as the prime number.

Making a call using the task tray or Calls menu

To make a call:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Click the **Manual Dial** menu item. The *Dial* dialog box appears.



3. Enter the telephone number you want to dial.

If you have the Search Option set to Fast Search, Personal Call Manager compares the number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom area of the dialog box. To dial one of these contacts, click the contact you want to call. The default number appears in the **Phone Number Type** field. To choose a different number, click the **Phone Number Type** list box then click Business, Home, or Mobile to select the number to call.

4. Click the **Dial** button.

If you want to call a contact in the Address Book and you only remember the contact's name, enter the contact's name. If you are using Fast Search, any contacts that match the name you are entering appear in the bottom area of the dialog box. If you are using Slow Search you must click the **Find Now** button to make the contacts appear.

For more information about Search Options, refer to "[Changing the Search preferences](#)" on page 81.

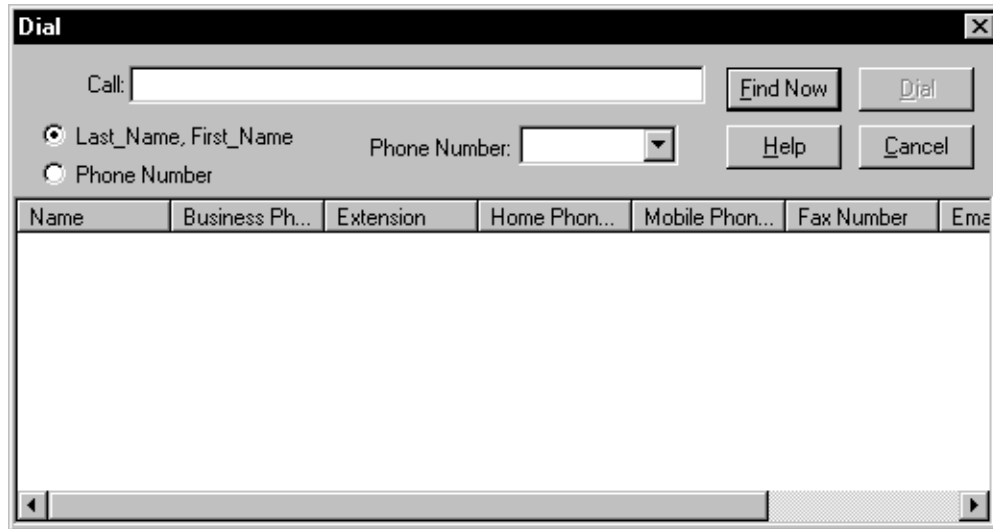
Tip: You can also open the *Dial* dialog box by:

1. Pressing the **F3** key.
OR
1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point to the **Quick Dials** menu item and then click the **Other** menu item.

Making a call using the toolbar

To make a call using the toolbar:

1. Click .
The *Dial* dialog box appears.



2. Enter the telephone number you want to dial.

If you have the Search Option set to Fast Search, Personal Call Manager compares the number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom area of the dialog box. To dial one of these contacts, click the contact you want to call. The default number appears in the **Phone Number Type** field. To choose a different number, click the **Phone Number Type** list box then click Business, Home, or Mobile to select the number to call.

3. Click the **Dial** button.

If you want to call a contact in the Address Book and you only remember the contact's name, enter the contact's name. If you are using Fast Search, any contacts that match the name you are entering appear in the bottom area of the dialog box. If you are using Slow Search you must click the **Find Now** button to make the contacts appear.

For more information about Search Options, refer to "[Changing the Search preferences](#)" on page 81.

Tip: You can also open the *Dial* dialog box by pressing the **F3** key.

Redialing a number

Personal Call Manager keeps a list of the last ten telephone numbers you called. The most recent call is at the top of the list and the oldest call is at the bottom. When there are already ten calls on the list and you make another call, the new call is added to the top of the list and the oldest call is deleted. If you call a number that is already on the list, the number does not appear on the list a second time. The number is moved from its previous location to the top of the list.

To redial one of the last ten telephone numbers:

1. Click the Personal Call Manager icon or the **Calls** menu.
2. Point to the **Redial List** menu item.
3. Click the number you want to redial.

Returning a call

Personal Call Manager keeps a list of the telephone numbers of the last ten people who called you. The Callers List shows both the calls you answered and the calls you were unable to answer. You can use this list to return the calls.

The calls shown on the Callers List are numbered from one to ten. Call number one is the most recent call and is stored at the top of the list. Call number ten is the oldest call and is stored at the bottom of the list. When there are already ten calls on the list and you receive another call, the new call is added to the top of the list and the oldest call is deleted. If you receive a call from a number that is already on the list, the number does not appear on the list twice. The number is moved from its previous location to the top of the list.

Telephone numbers are only shown on the Callers List if:

- You subscribe to a Caller ID (CLID) service.
- OR
- Your TAPI Service Provider (such as the Norstar TAPI Service Provider) provides name or number information for internal calls.

To return a call:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point to the **Callers List** menu item.
3. Click the number of the person you want to call.

Calling from the Quick Dial list

Before you can call a number from the Quick Dial list, you must add that number to the Quick Dials. For more information about Quick Dials, refer to “[Quick Dials](#)” on page 77.

To call one of the numbers from the Quick Dial list using the Address Book:

1. Click the Quick Dials icon in the Tree View portion of the Address Book.
The icons of all the Quick Dials appear in the List View of the Address Book.
2. Drag the icon of the contact you want to call into the Calls box.

To call one of the numbers from the Quick Dial list using the Personal Call Manager task tray or Calls menu:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point at the **Quick Dials** menu item.
3. Click the icon of the person you want to call.

Answering a call

Knowing when someone is calling

Personal Call Manager notifies you when there is an incoming call. When someone calls you, the *You Have a New Call* dialog box appears, and the Ringing icon appears in the Calls box, the Personal Call Manager task tray menu and the Calls menu. If you subscribe to a Caller ID service, or you are receiving an internal call through Norstar, the name or number of the caller appears below the icon and in the *You Have a New Call* dialog box.

Knowing who is calling

When a call is made or received an icon appears in the Calls box, Calls menu, and Personal Call Manager task tray menu. These icons are given a label to help identify who is on the call. The information on the label depends on several factors.

If you subscribe to a Caller ID service, Personal Call Manager compares the received number to the numbers stored in the Address Book. If a match is found, the name from the Address Book appears with the Active Call icon. If a match is not found, then the name sent with the Caller ID information appears. If a match is not found and a name is not sent with the Caller ID information, then the telephone number appears.

If no Caller ID information is available, or you do not subscribe to this service, then the word Unknown is used as the label.

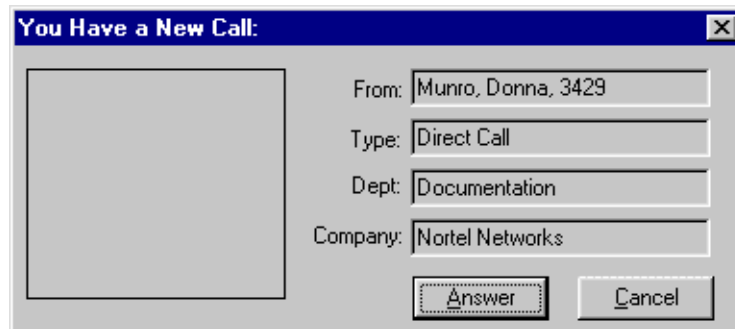
If you are using a Norstar system and the Norstar TAPI Service Provider, internal calls show the name of the contact stored in the Address Book if available. When there is no name for the caller in the Address Book, then the Norstar extension name appears.

Displaying who is calling from the task tray

When you click the Personal Call Manager icon in the task tray, the current calls appears at the top of the menu. If you subscribe to a Caller ID service or you are receiving an internal call through Norstar, the name or number of the caller appears beside the icon. To perform a function on one of the current calls, point at the name or number of the caller and a menu appears.

Answering a call using the You Have a New Call dialog box

Personal Call Manager displays the *You Have a New Call* dialog box when you receive a call.



If you subscribe to Caller ID services and your TAPI Service Provider supports Caller ID, information about the caller is displayed on the *You Have a New Call* dialog box. If the caller is one of the contacts in your Address Book, the name, telephone number, type of call, department, and Company appear on the dialog box. Also, a small picture appears in the dialog box and a voice announce message plays, if you assigned them when you added the contact. For more information about adding contacts to the Address Book, refer to “[Adding a new contact to the Address Book](#)” on page 53. If the Caller is not one of your contacts, the name and/or telephone number and call type appears.

To answer a call using the *You Have a New Call* dialog box:

1. Click the **Answer** button.

Note: The **Cancel** button only cancels the *You Have a New Call* dialog box, not the call. If you click the **Cancel** button, the *You Have a New Call* dialog box closes but the call continues to ring on your telephone.

Answering a call from the main window

To answer the call:

1. Double click the Ringing icon. The icon changes to the Active Call icon and the call is answered.

OR

1. Right click the Ringing icon in the Calls box.
2. Click the **Answer** menu item.

Answering a call from the task tray or Calls menu


To answer a call:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point to the label of the call.
3. Click the **Answer** menu item.

Accessing the Notes tab

After you have answered the call, you can display the **Notes** tab of the *Address properties* dialog box. The **Notes** tab is used to record information about the contact, such as recent orders, meeting locations, etc. For instructions about adding information to the **Notes** tab, refer to “[Note](#)” on page 59.

To display the **Notes** tab:

1. Click the icon of the caller.
2. Click .

Putting a call on hold

When a call is put on hold, the icon for the call changes from the Active Call icon to the Held Call icon. For information about the various icons, refer to “[Personal Call Manager task tray menu](#)” on page 9 and “[Current Calls icons](#)” on page 14.

Putting a call on hold using the main window

To put a call on hold:

1. Make or answer the call.
2. Right click the icon of the call in the Calls box.
3. Click the **Hold** menu item.

Putting a call on hold using the task tray or Calls menu

To put a call on hold:

1. Make or answer the call.
2. Click the Personal Call Manager icon or the **Calls** menu.
3. Point to the call you want to put on hold.
4. Click the **Hold** menu item.

Answering a held call using the main window

To answer a held call:

1. Right click the icon of the call in the Calls box.
2. Click the **UnHold** menu item.

Answering a held call using the task tray or Calls menu

To answer a held call:

1. Click the Personal Call Manager icon or the **Calls** menu.
2. Point to the caller you want to talk to.
3. Click the **UnHold** menu item.

Multiple calls

Personal Call Manager can control several calls at once. The maximum number of calls is equal to the maximum number of lines available. All of the calls currently connected appear on the Personal Call Manager task tray menu, the **Calls** menu, and the main window.

Although several calls can be controlled, only one call can be active at any time, except if you have a conference. In a conference, you can have two active calls. When you answer a held call, the currently active call is automatically put on hold. This allows you to switch between held calls simply by answering the caller you want to talk to.

Switching between calls on the main window

On the main window, the currently connected calls are shown in the Calls box. The currently active call shows the Active Call icon while the rest of the calls show the Held Call icon.

To switch to a different call:

1. Double click the icon of the caller you want to talk to.

OR

1. Right click the icon of the caller you want to talk to.
2. Click the **UnHold** menu item.

Switching between calls on the task tray and Call menus

On the Personal Call Manager task tray menu and the **Calls** menu, the currently connected calls appear at the top of the menu. The currently active call shows the Active Call icon while the rest of the calls show the Held Call icon.

To switch to a different call:

1. Point to the caller you want to talk to.
2. Click the **UnHold** menu item.
The call you pointed to becomes the active call and the other call is put on hold.

Transferring a call

Personal Call Manager allows you to transfer a call to a different telephone. You can transfer the call with an announcement or without. With an announcement, you are calling the person you are transferring the call to before you actually transfer the call. Announcements are used to inform the person who the caller is and why they are calling.

Note: Transferring your telephone to an external telephone number is not supported when you are using the Norstar TAPI Service Provider.

Transferring a call without an announcement

When you transfer a call without an announcement, you are transferring without checking if the person is available to answer the call. This is also known as a blind transfer.

Transferring a call using the main window

To transfer a call:

1. Make or answer the call.
2. Drag the icon of the call to another call icon in the Calls box or to a contact icon in the Address Book.

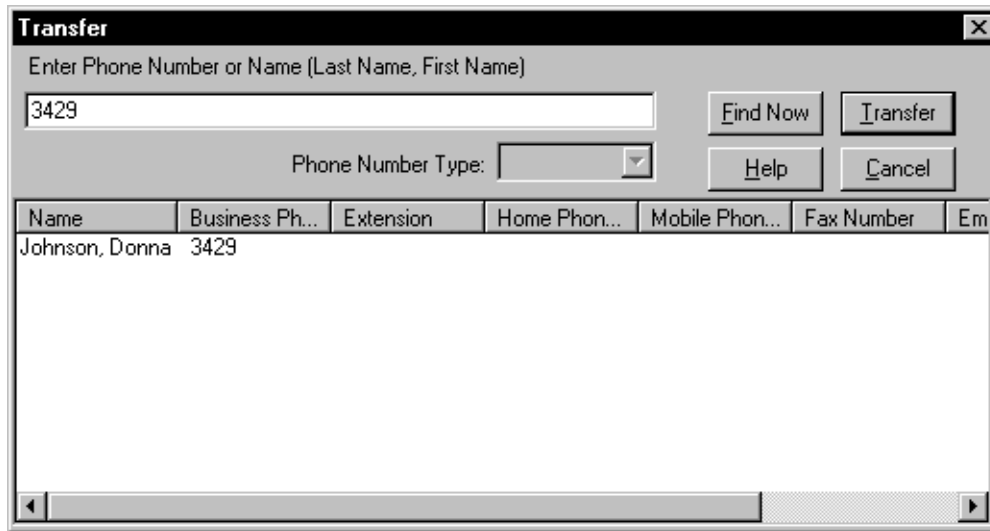
If you are transferring the call to a contact in the Address Book, the contact must be showing in the List View portion of the Address Book. For information about finding a contact, see “[Finding a contact in the Address Book](#)” on page 60.

Transferring a call using the right mouse button

You can use the right mouse button and the icons on the main window to transfer a call. To transfer a call:

1. Make or answer the call.
2. Right click the icon in the Calls box.
3. Point to the **Transfer** menu item.
A menu of the current calls appears.
4. Click one of the current calls.
The call is transferred to the person selected.
If the person you want to transfer the call to does not appear on the list of current calls, perform steps 5 and 6.

5. Click the **Other** menu item.
The *Transfer* dialog box appears.



6. Enter the telephone number of the person you want to transfer the call to and click the **Transfer** button. The call is transferred to the number entered.

Tip: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

Tip: If you want to call a contact that is in the Address Book and you only remember the contact's name, enter the contact's name.

If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

If Slow Search is enabled, you must enter the name and then click the **Find Now** button. Any contacts that match the name you entered appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

For information about Fast and Slow Search, see "[Changing the Search preferences](#)" on page 81.

Transferring a call using the task tray or Calls menu

To transfer a call:

1. Make or answer the call.
2. Click the Personal Call Manager task tray icon or the **Calls** menu.
3. Point to the **Transfer** menu item.
A menu of the current calls appears.
4. Click one of the current calls.
The call is transferred to the person selected.
If the person you want to transfer the call to does not appear on the list of current calls, perform steps 5 and 6.
5. Click the **Other** menu item.
The *Transfer* dialog box appears.
6. Enter the telephone number of the person you want to transfer the call to and click the **Transfer** button. The call is transferred to the number entered.

Tip: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

Tip: If you want to call a contact that is in the Address Book and you only remember the contact's name, enter the contact's name.

If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

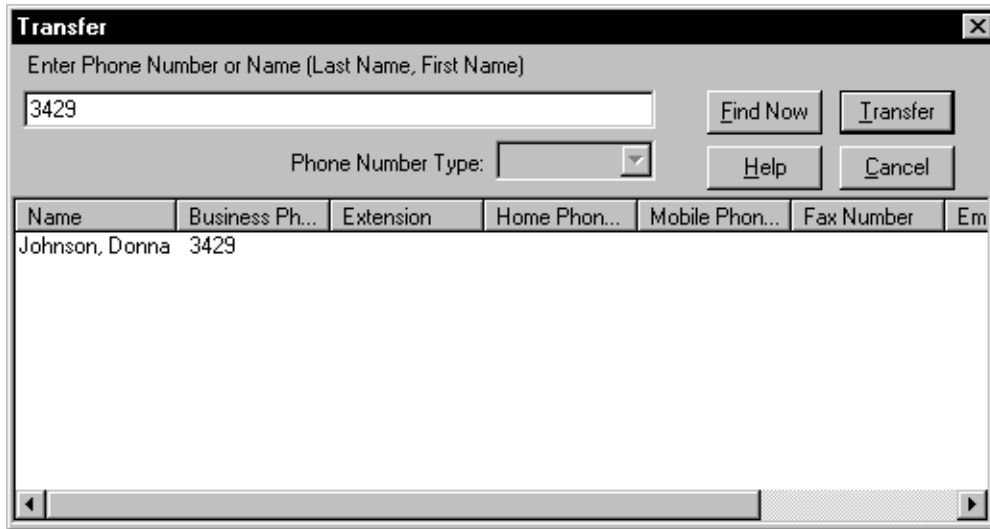
If Slow Search is enabled, you must enter the name and then click the **Find Now** button. Any contacts that match the name you entered appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

For information about Fast and Slow Search, see "[Changing the Search preferences](#)" on page 81.

Transferring a call using the keyboard

You can use the keyboard and the icons on the main window to transfer a call. To transfer a call:

1. Make or answer the call.
2. Click the icon in the Calls box.
3. Press the **F4** key.
The *Transfer* dialog box appears.



4. Enter the telephone number of the person you want to transfer the call to and click the **Transfer** button. The call is transferred to the number entered.

Tip: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

Tip: If you want to call a contact that is in the Address Book and you only remember the contact's name, enter the contact's name.

If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

If Slow Search is enabled, you must enter the name and then click the **Find Now** button. Any contacts that match the name you entered appear in the bottom area of the dialog box. Click the contact you want and click the **Transfer** button.

For information about Fast and Slow Search, see "[Changing the Search preferences](#)" on page 81.

Transferring a call with an announcement

When you transfer a call with an announcement, you are calling the person you are transferring the call to so you can check if they are available, and give them information about the call.

Transferring a call with an announcement using the main window

To transfer a call:

1. Make or answer the call.
2. Put the call on hold.
3. Call the person you are transferring the call to.
4. Give the person any pertinent information about the call.
5. Drag the icon of the call you are transferring to the Active Call icon.

Transferring a call with an announcement using the right mouse button

You can use the right mouse button and the icons on the main window to transfer a caller. To transfer a call:

1. Make or answer the call.
2. Put the call on hold.
3. Call the person you are transferring the call to.
4. Give the person any pertinent information about the call.
5. Right click the icon in the Calls box and point to the **Transfer** menu item.
A menu of the current calls appears.
6. Click the icon of the person you are transferring.

Transferring a call with an announcement using the task tray or Calls menu

To transfer a call:

1. Make or answer the call.
2. Put the call on hold.
3. Call the person you are transferring the call to.
4. Give the person any pertinent information about the call.
5. Click the Personal Call Manager task tray icon or the **Calls** menu.
6. Point to the **Transfer** menu item.
A menu of the current calls appears.
7. Click the icon of the person you are transferring (the first call you made or answered).

Conferencing a call

In a conference call you are connecting yourself and two other people onto a single call.

Creating a conference

To create a conference you must have at least two lines, one for each caller. These two lines can be external lines or intercom lines.

Creating a conference using the Conference box

To create a conference:

1. Make or answer the two calls you want to connect in a conference call.
2. Drag the icon of the first call from the Calls box to the Conference box.
3. Drag the icon of the second call from the Calls box to the Conference box.

The icons for the two calls change to the Conference icons.

Creating a conference using the Calls box

To create a conference:

1. Make or answer the two calls to be connected in a conference call.
2. Right click the icon of the first call to be connected in a conference call.
3. Click the **Conference** menu item.
4. Right click the icon of the second call to be connected in a conference call.
5. Click the **Conference** menu item.

The icons for the two calls move to the Conference box and their icons change to the Conference icon.

Creating a conference using the task tray or Calls menu

To create a conference:

1. Make or answer the two calls to be connected in a conference call.
2. Click the Personal Call Manager task tray icon or the **Calls** menu.
3. Point to the first call to be conferenced and click the **Conference** menu item.
4. Click the Personal Call Manager task tray icon or the **Calls** menu.
5. Point to the second call to be conferenced and click the **Conference** menu item.

The icons for the two calls change to the Conference icon.

Putting the conference calls on hold

When you put a conference on hold, both calls are put on hold. Neither caller can speak to you but the two callers can speak to each other.

Putting the conference calls on hold using the main window

To put the conference calls on hold:

1. Right click one of the calls in the Conference box.
2. Click the **HoldConf** menu item.

The calls are put on hold and the icons change to the Held Conference icon.

Putting the conference calls on hold using the task tray or Calls menu

To put the conference calls on hold:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point to one of the calls in the conference.
3. Click the **HoldConf** menu item.

The calls are put on hold and the icons change to the Held Conference icons.

Taking a conference off hold

There are two ways to take a conference off hold.

Restoring a held conference using the main window

To cancel hold on a conference:

1. Right click one of the calls in the Conference box.
2. Click the **UnHoldConf** menu item.

The calls in the conference become active and the icons change to the Conference icons.

Restoring a held conference using the task tray or Calls menu

To cancel hold on a conference:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point to one of the calls in the conference.
3. Click the **UnHoldConf** menu item.

The calls in the conference become active and the icons change to the Conference icons.

Splitting a conference

When you split a conference, the conference is ended, but both calls remain connected. One of the callers becomes the active call and the other caller is put on hold. Since the conference is ended, the two callers can no longer speak to each other.

Splitting a conference using the main window

To split a conference using the main window:

1. Drag one of the icons out of the Conference box.

The call whose icon you removed from the Conference box becomes the active call and the other call is put on hold. The icons for both calls are moved to the Calls box.

You can also use the right mouse button and the icons on the main window to split a conference. To split a conference:

1. Right click one of the icons in the Conference box.
2. Click the **Split Conf** menu item.

The caller you selected becomes the active call while the other caller is put on hold. The icons for both calls are moved to the Calls box.

Splitting a conference using the task tray or Calls menu

To split a conference:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point to the icon of one of the callers in the conference.
3. Click the **Split Conf** menu item.

The caller you selected becomes the active call while the other caller is put on hold.

Ending a conference


When you end a conference, you are removing yourself from the conference and allowing the other two callers to continue to talk to each other. While the other callers are talking to each other, they are still using two of your telephone lines.

If you want to end the conference and disconnect both the callers, split the conference and then end each of the calls.

Ending a conference using the release button

To end a conference:

1. Click the icon of one of the conference calls in the Conference box.

2. Click  (The one in the Conference box).

Ending a conference using the main window

To end a conference:

1. Right click one of the icons in the Conference box.
2. Click the **Release Conf** menu item.

The conference is ended.

Ending a conference using the keyboard

To end a conference:

1. Click one of the icons in the Conference box.
2. Press the **Delete** key on your PC keyboard.

The conference is ended.

Note: When using the keyboard to end a call, make sure you have clicked on one of the icons in the Conference Box before you pressing the **Delete** key. If you do not and a contact in the Address Book is highlighted, the contact is deleted. To retrieve a contact that is accidentally deleted in this manner, click the **Edit** menu and then the **Undo** menu item.

Ending a conference using the task tray or Calls menu

To end a conference:

1. Click the Personal Call Manager task tray icon or **Calls** menu.
2. Point to the icon of one of the calls in the conference.
3. Click the **Release Conf** menu item.

The conference is ended.


Ending a call

Ending a call using the release button

To end a call:

1. Click the icon of the call in the Calls box.

Note: If there is only one call in the Calls box, you do not need to select the call.

2. Click  (The one in the Conference box).

Ending a call using the main window

To end a call:

1. Right click the icon of the call in the Calls box.
2. Click the **Release** menu item.

Ending a call using the task tray or Calls menu

To end a call:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Point to the call you want to disconnect.
3. Click the **Release** menu item.

Ending a call using the keyboard

To end a call using the keyboard, the Personal Call Manager main window must be visible.

To end a call:

1. Click the icon of the call in the Calls box.
2. Press the **Delete** key on your PC keyboard.

Note: When using the keyboard to end a call, make sure you have clicked on the icon in the Calls Box before you pressing the **Delete** key. If you do not and a contact in the Address Book is highlighted, the contact is deleted. To retrieve a contact that is accidentally deleted in this manner, click the **Edit** menu and then the **Undo** menu item.

Calling features

Personal Call Manager gives you easy access to two common calling features: Do Not Disturb and Call Forward.

Do Not Disturb (DND)

When DND is enabled, the telephone will not ring when someone calls, but the line indicator still flashes. In Personal Call Manager, the *You Have a New Call* dialog box still appears and the icon for the call appears in the Calls box.


You can turn the Do Not Disturb (DND) feature on or off from the **Calls** menu or the Personal Call Manager icon in the task tray.

Turning DND on or off

To turn DND on or off:

1. Click the Personal Call Manager task tray icon or the **Calls** menu.
2. Click the **DND** menu item.

When DND is on:

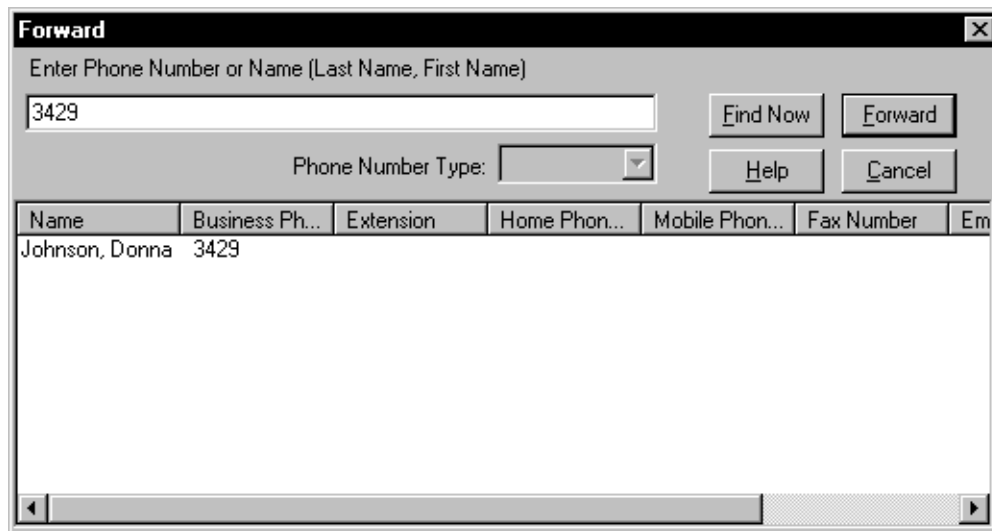
- the Personal Call Manager task tray icon changes to 
- the symbol ✓ appears beside the **DND** menu item on the **Calls** menu and the Personal Call Manager task tray menu
- DND appears in Status bar

Call Forward

To call forward your telephone:

1. Click the **Tools** menu.

- Click the **Forward** menu item.
The *Forward* dialog box appears.



- Enter the telephone number you want to call forward your telephone to.
- Click the **Forward** button.

The number your telephone is forwarded to appears on the [Status bar](#).

Tip: If Fast Search is enabled, Personal Call Manager compares the telephone number you are entering to the contacts stored in the Address Book. Any contacts that match the numbers you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Forward** button.

Tip: If you want to forward your telephone to a contact that is in the Address Book and you only remember the contact's name, enter the contact's name.

If Fast Search is enabled, any contacts that match the name you are entering appear in the bottom area of the dialog box. Click the contact you want and click the **Forward** button.

If Slow Search is enabled, you must enter the name and then click the **Find Now** button. Any contacts that match the name you entered appear in the bottom area of the dialog box. Click the contact you want and click the **Forward** button.

For information about Fast and Slow Search, see "[Changing the Search preferences](#)" on page 81.

Note: Call forwarding your telephone to an external telephone number is not supported when you are using the Norstar TAPI Service Provider.

Calls Log Window

The Calls Log consists of two parts: the Incoming Calls Log and the Outgoing Calls Log. The Incoming Calls Log shows all of the calls that were made to your telephone. The Outgoing Calls Log shows all of the calls you made from your telephone. Calls made or received while Personal Call Manager was not operating are not shown.

The Calls Log shows the name and telephone number of the caller, if available. The Calls Log also shows the date and time the call was made and how long the call was.

Viewing the Calls Log

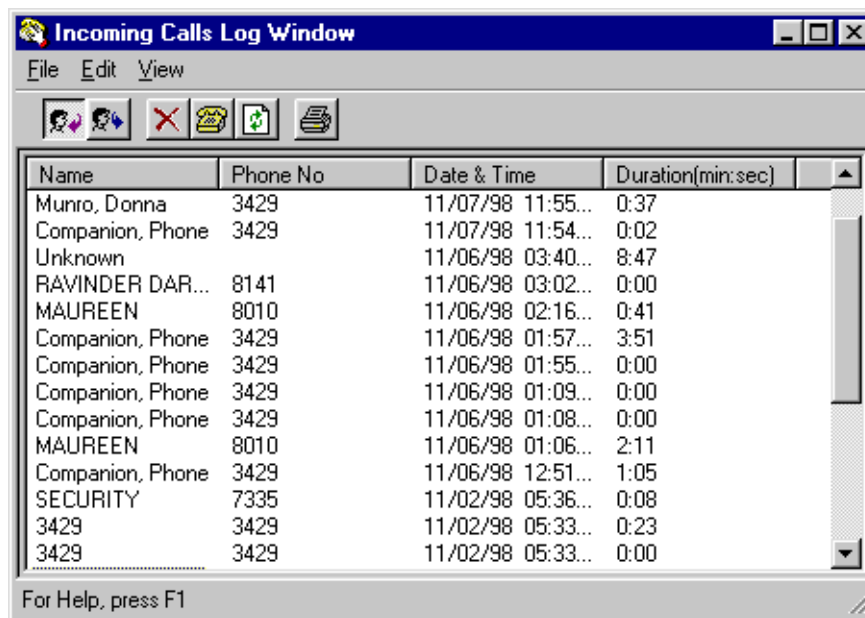
To view the Calls Log:

1. Click .

OR

1. Click the **Tools** menu and then click the **Show Call Log Window** menu item.

The Calls Log window appears with either the Incoming Calls showing or the Outgoing Calls showing.



Viewing the Incoming Calls

To view the Incoming Calls:

1. Click .

OR

1. Click the **View** menu and then click the **Incoming Calls Log** menu item.

Viewing the Outgoing Calls

To view the Outgoing Calls:

1. Click .

OR

1. Click the **View** menu.
2. Click the **Outgoing Calls Log** menu item.

Updating the Calls Log

If you make or answer a call while the Calls Log is open, the Calls Log is not updated. To update the Calls Log:


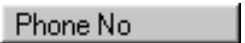


1. Click .

OR

1. Click the **View** menu.
2. Click the **Refresh** menu item.


Sorting the Calls Log

You can sort the Calls Log by name, telephone number, duration, or date and time.

- To sort the Calls Log by the name of the caller, click .
- To sort the Calls Log by the telephone number of the caller, click .
- To sort the Calls Log by the length of the call, click .
- To sort the Calls Log by time the call was made or received, click .


Making a call from the Calls Log

You can call any of the numbers stored in the Incoming or Outgoing Call Log. To make a call:

1. Click the number you want to dial.
 2. Click .
- OR
1. Click the number you want to dial.
 2. Click the **Edit** menu and then click **Redial**.


Printing call information from the Calls Log

You can print the Calls Log information for any call in the Calls Log. To print the Calls Log information:

1. Click the call you want to print.
Note: You can select several calls to print by holding down the Control or Shift key and clicking on other calls.
 2. Click .
- OR
- Click the **Edit** menu and then click **Print**.

Deleting calls from the Calls Log

To delete a call from the Calls Log:

1. Select the call you want to delete.
 2. Click .
- OR
- Click the **Edit** menu and then click the **Delete** menu item.

Closing the Calls Log Window

To close the Calls Log Window:

1. Click the **File** menu and then click the **Exit** menu item.

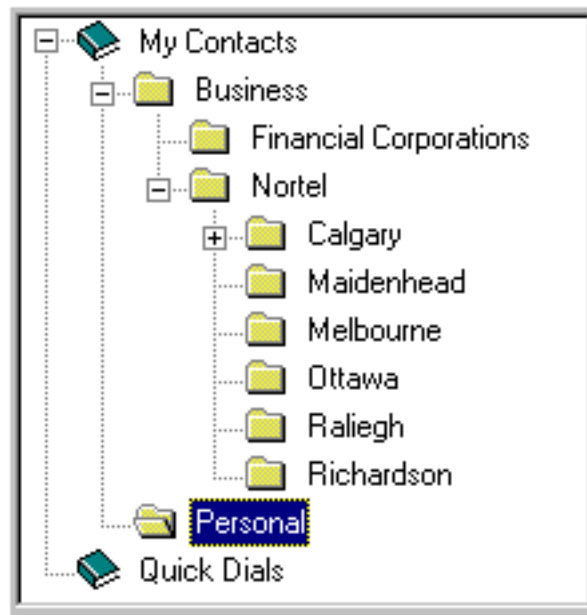
You can also close the Calls Log Window by clicking on the close window button in the top right-hand corner of the window.

Address Book

The Address Book is the portion of Personal Call Manager where you store the telephone numbers and addresses of the people and businesses you deal with. Each entry in the Address Book is called a contact. A contact is normally the telephone number of a person or business, but can be any number you want to keep track of or store in Personal Call Manager.

The Tree View of the Address Book

When you view the Address Book, the left side shows the tree structure of the Address Book. The tree structure shows how the folders are organized. It also allows you to select the folder you want to view. A sample tree view is shown below.



The contacts are stored in two main areas:

- Quick Dials – Contacts added to the Quick Dials section appear on the **Calls** menu and the Personal Call Manager task tray menu. You can add contacts to the Quick Dials section, but not folders.
- My Contacts – Contacts added to the My Contacts section do not appear in the **Calls** or Personal Call Manager task tray menu, but can easily be accessed from the Address Book. In the My Contacts section, you can add contacts and folders.

Folders are added to help organize the contacts. By grouping the contacts into smaller groups of similar contacts, the contacts are easier to view on the screen and thus easier to find and access.

You can change which folders are shown by clicking on certain portions of the Tree View. Clicking on a box with “+” inside it expands the folder that it is beside, showing the folders contained in that folder. Clicking on the a box with “-” in it collapses the folder it is beside, hiding the folders that are in the folder. Double clicking on a folder will open or close the folder. When a folder is open, the contents of the folder is shown in the List view portion of the Address Book.


The List View portion of the Address Book

On the right side of the screen is the List View of the Address Book. The List View shows the contacts and folders stored in the folder selected in the Tree View.

The List View of the Address Book can be viewed in four different formats: large icons, small icons, list, and detail.


Displaying the Address Book in large icons

In large icons, each contact is shown with the last name of the contact below the icon. To view in large icons:

- Click .
- OR
- Click the **View** menu then click the **Large Icon** menu item.


Displaying the Address Book in small icons

In small icons, each contact is shown with the last name of the contact to the right of the icon and the contacts are arranged horizontally. To view in small icons:

- Click .
- OR
- Click the **View** menu then click the **Small Icon** menu item.


Displaying the Address Book in list view

In list view, each contact is shown with the last name of the contact to the right of the icon and the contacts are arranged vertically. To view in list view:

- Click .
- OR
- Click the **View** menu then click the **List** menu item.

Displaying the Address Book in details view

In details view, the contacts are shown with more information. With each contact there is the last name, first name, the telephone numbers you can call and the Email Address and Email type. To view in details view:

- Click .
- OR
- Click the **View** menu then click the **Detail** menu item.


Contacts

A contact is any entry in the Address Book. A contact can be a person, business, or any number or address you want stored in Personal Call Manager.

Adding a new contact to the Address Book

Contacts are added using the *Address Properties* dialog box.

To access the *Address Properties* dialog box using the toolbar:

1. Click .
- The *Address Properties* dialog box appears.
2. Enter the address information for this contact.
For descriptions of the address fields, refer to “[Address Properties dialog box](#)” on page 54.
3. Click the **OK** button.

Note: If a contact with the same name is already in the Address Book, a dialog box appears asking if you want to make a duplicate. If you want to make a duplicate of a contact, it is recommended that you use the copy method described in “[Copying a contact](#)” on page 64.

The contact is added to the folder shown in the List View of the Address Book.

To access the *Address Properties* dialog box using the right mouse button:

1. Right click in an open area in the List view portion of the Address Book.
1. Point to the **New** menu item and then click the **Contact** menu item.
The *Address Properties* dialog box appears.
2. Enter the address information for this contact.
For descriptions of the address fields, refer to “[Address Properties dialog box](#)” on page 54.
3. Click the **OK** button.

Note: If a contact with the same name is already in the Address Book, a dialog box appears asking if you want to make a duplicate. If you want to make a duplicate of a contact, it is recommended that you use the copy method described in “[Copying a contact](#)” on page 64.

The contact is added to the folder shown in the List View of the Address Book.

To access the *Address Properties* dialog box using the menu bar:

1. Click **File** and then point to the **New** menu item.
1. Click the **Contact** menu item.
The *Address Properties* dialog box appears.
2. Enter the address information for this contact.
For descriptions of the address fields, refer to “[Address Properties dialog box](#)” on page 54.
3. Click the **OK** button.

Note: If a contact with the same name is already in the Address Book, a dialog box appears asking if you want to make a duplicate. If you want to make a duplicate of a contact, it is recommended that you use the copy method described in “[Copying a contact](#)” on page 64.

The contact is added to the folder shown in the List View of the Address Book.

Address Properties dialog box

The *Address Properties* dialog box consists of four tabs. Each tab is used to enter a different type of contact information.

- **Business** - Use this tab to enter the name, address, and telephone number of the contact.
- **EMail Address** - Use this tab to enter the EMail address and type.
- **Settings** - Use this tab to define the default telephone number used.
- **Note** - Use this tab to enter any other information about the contact.

Business

The Business tab is used to enter the name, address, and telephone number of a contact.

The screenshot shows a dialog box titled "Munro, Donna-Address Properties" with a close button (X) in the top right corner. The dialog has four tabs: "Business", "EMail Address", "Settings", and "Notes". The "Business" tab is active. The form is organized into two columns. The left column contains fields for Name (Last: Munro, First: Donna), Address (2421-37 Ave N.E.), City (Calgary), State (Alberta), Zip code (T2E 6Y7), and Country (Canada). The right column contains fields for Title (Production Manager), Company (Nortel Networks), Department (Documentation), Office (ATA), Assistant, and Phone number (Business: 3429). At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

The first information you enter is the contact's name. The contact's name is divided into the first name and the last name. Both the first name and the last name must be entered before a contact can be added to the Address Book. The last name is used as the label for the contact in the Address Book. The first name is used as the label in the Calls box when you are on a call to the contact. When you are searching for a contact, you can search using the first name or the last name.

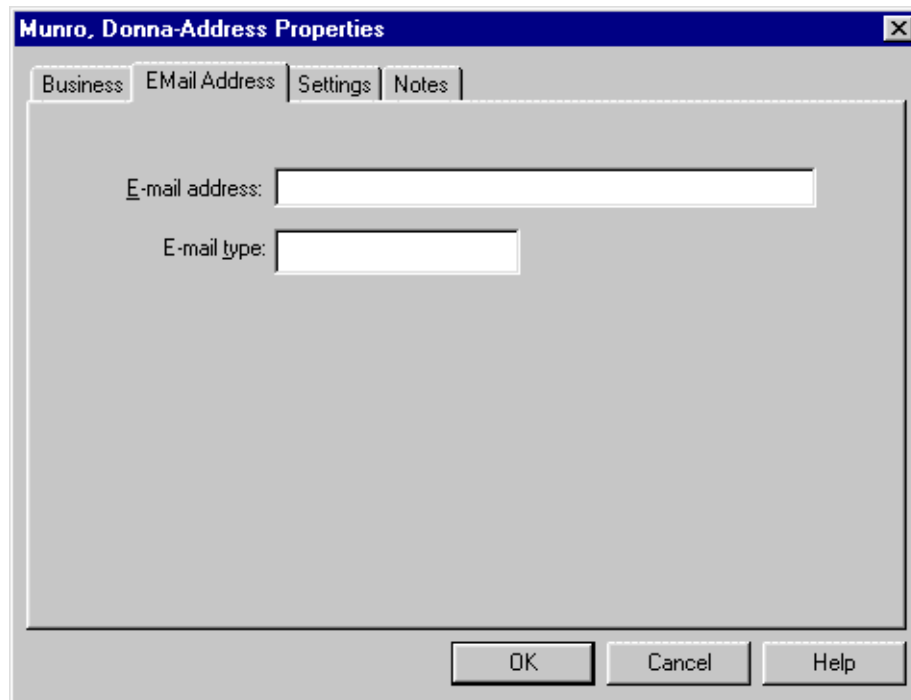
After you enter the name you can enter the contact's address. There are five different fields used to enter the address: Address, City, State, Zip code, and Country.

After entering the address, you can enter the Title, Company, Department, Office, and Assistant of the contact.

The final information to enter is the contact's telephone numbers. The **Phone number** field is a drop list that allows you to enter four different telephone numbers. You can enter the Business, Home, Mobile, and Fax telephone numbers for the contact. Either the Business, Home, or Mobile telephone number can be dialed from the task tray or the Personal Call Manager main window.

E-Mail Address

The E-Mail Address tab has two fields: E-mail address and E-mail type.

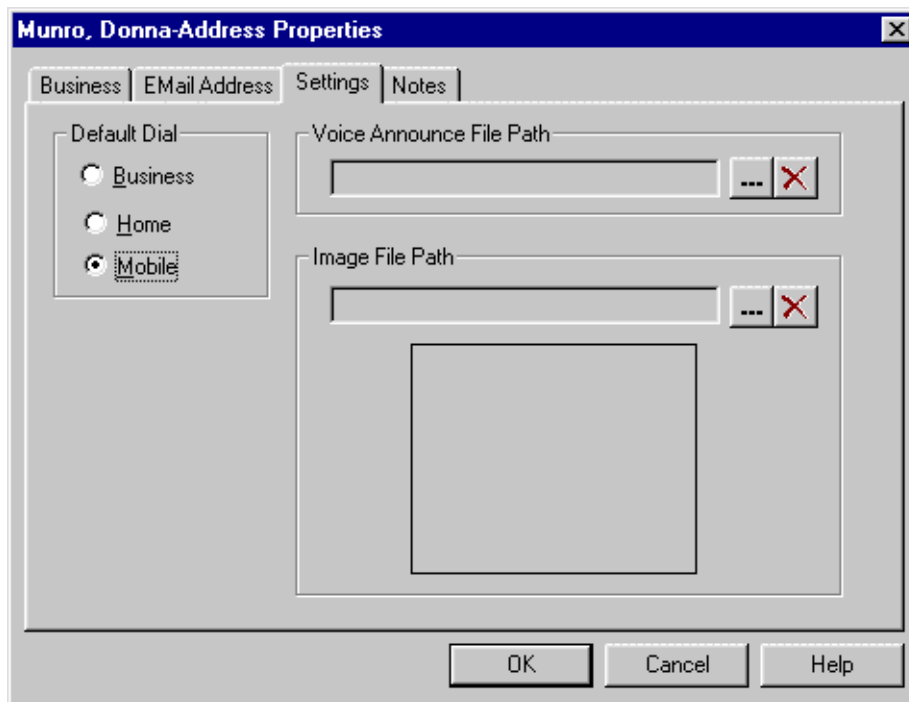


The screenshot shows a dialog box titled "Munro, Donna-Address Properties" with a close button (X) in the top right corner. The dialog has four tabs: "Business", "EMail Address", "Settings", and "Notes". The "EMail Address" tab is selected. Inside the dialog, there are two input fields: "E-mail address:" followed by a long text box, and "E-mail type:" followed by a shorter text box. At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

The E-mail address specifies where the contact's E-mail account is. The E-mail type specifies which type of E-mail service the contact is using.

Settings

The Settings tab allows you to select which dialing default is used for this contact and the picture displayed and voice announcement heard when this contact calls you.




For the default telephone number dialed, you can choose Business, Home, or Mobile. The settings you specify here define the telephone number automatically used for this contact only. Other contacts are not affected by the defaults you choose for this contact. Also, you can choose to override these settings when making a call by selecting any other telephone number defined for the contact in the Address Book.

You can select a voice announcement to play when you receive a call from this contact. This voice announcement allows you to identify who is calling without having to look at the PC screen or telephone display.


To add or change the voice announcement for this contact:

1. Record the voice announcement message you want played when this contact calls and save it in a .WAV file format. The message is typically the contacts name, but can be any sound file that is saved in a .WAV file format.

Note: You can record the voice announcement using the Sound Recorder accessory included with Windows 95 or any other sound editing application.

2. Click  beside the **Voice Announce File Path** field.
3. Move to the folder where the voice announcement file is stored.
4. Double click the voice announcement file you want to use.


If you decide you no longer want a voice announcement for this contact, you can remove the voice announcement from the contact. To remove the voice announcement:

1. Click  beside the **Voice Announce File Path** field.
The voice announcement no longer plays for this contact.


Note: The .WAV file you deleted from the contact is not deleted from the PC hard drive and can be used again later.

You can select a bit map image that is displayed on the *You Have a New Call* dialog box when you receive a call from this contact. The image gives you a visual reminder of who the caller is. The image is typically a bit map picture (.BMP file) of the contact, but can be any .BMP file that reminds you of the contact.

To add or change the bit map image:

1. Create or find the image you want displayed when this contact calls. You can create this file with any graphics application that saves the image as a .BMP file.
2. Click  beside the **Image File Path** field.
3. Move to the folder where the image file is stored.
4. Double click the image file you want to use.

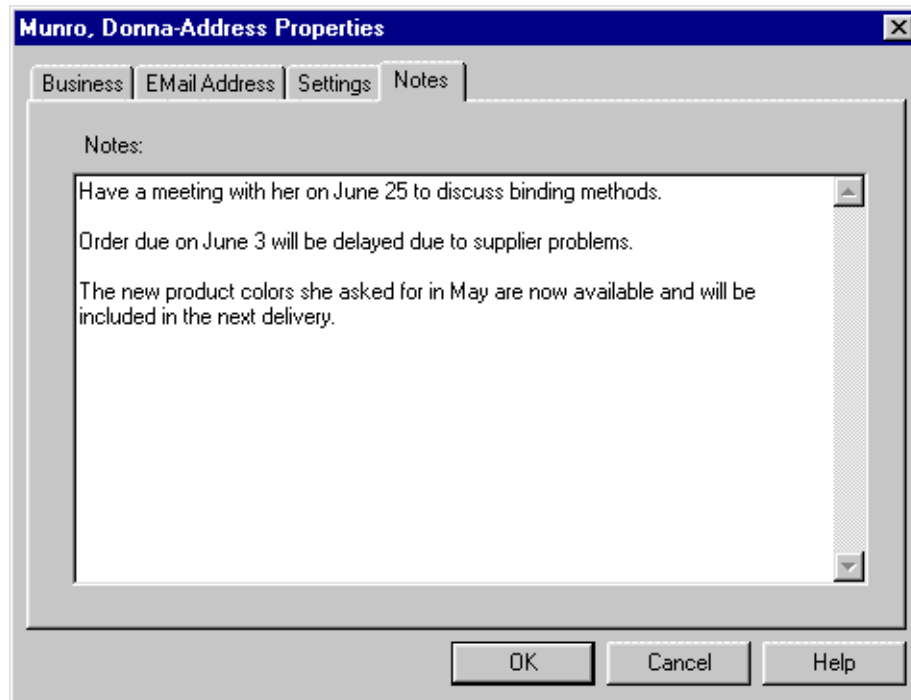
If you decide you no longer want Personal Call Manager to display an image when this contact calls, you can remove the image file from the contact. To remove the image file:

1. Click  beside the **Image File Path** field.
The image file no longer appears for this contact.

Note: The .BMP file you deleted from the contact is not deleted from the PC hard drive and can be used again later.


Note

The Note tab is used to record miscellaneous information about the contact. You can enter significant dates, recent orders, meeting locations or any information you want handy when you call the contact.

**Adding a caller to the Address Book**

When you receive a call, you can add that caller to your Address Book. You must open the Personal Call Manager main window before you add a caller.

To add a caller:

1. Click the caller's icon in the Calls box.
2. Click .

A dialog box appears asking you if you want to create a new contact.
3. Click the **Yes** button.

The *Address Properties* dialog box appears.
4. Enter the address information for this contact.

For descriptions of the address fields refer to "[Address Properties dialog box](#)" on page 54.
5. Click the **OK** button.

The contact is added to the folder shown in the List View of the Address Book.

Tip: If you subscribe to Caller ID service, the telephone number, and name if available, are automatically entered into the dialog box.

Finding a contact in the Address Book

The Address Book has a search feature to help you find a contact. You can search for a contact using the contact's name or telephone number.

The Search feature operates in two different modes: Slow Search and Quick Search. In Slow Search mode, you enter the characters you want to find and then click the **Find Now** button. Personal Call Manager then searches through the Address Book to find the contact. In Quick Search mode, Personal Call Manager starts searching through the contacts as soon as you enter a character.

To change the Search mode used, refer to "[Changing the Search preferences](#)" on page 81.

Slow Search

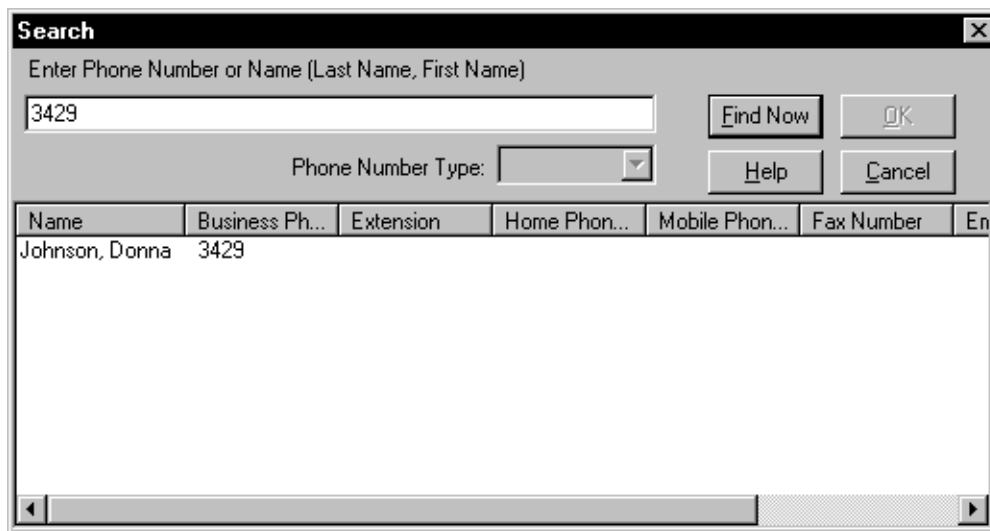
To find a contact:

1. Click the **Tools** menu and then click the **Find Person** menu item.

OR

Click .

The *Search* dialog box appears.



2. Enter the name or telephone number of the contact you want to find.
3. Click the **Find Now** button.
A list of the contacts that match the name or number you entered appears in the bottom of the *Search* dialog box.
4. Click the last name of the contact you want.
5. Click the **OK** button.
The folder containing the contact opens and the selected contact is highlighted.

Quick Search

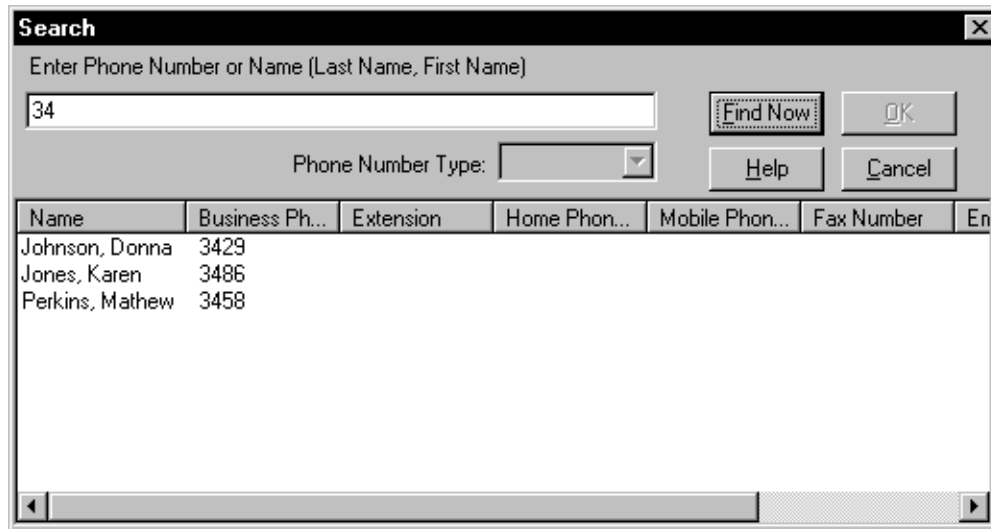
To find a contact:

1. Click the **Tools** menu and then click the **Find Person** menu item.

OR

Click .

The *Search* dialog box appears.



2. Enter the first character of the name or telephone number of the contact you want to find.
Personal Call Manager compares the letter or number you entered to the contacts stored in the Address Book. Any contacts that match the character you entered appear in the bottom area of the *Search* dialog box.

If you have several contacts starting with that character, enter the next character in the name or telephone number. Personal Call Manager then displays only the contacts that match both of those characters.
3. Continue entering characters or use the scroll bar to find the contact in the *Search* dialog box.
4. Click the last name of the contact you want.
5. Click the **OK** button.
The folder containing the contact opens and the selected contact is highlighted.

Entering names or numbers

There are times when you know only part of the name or telephone number of the contact you want to find. When this happens, you can enter the letters or digits you know and the Search feature will find all of the contacts that match the information you entered. You can then select the contact you were looking for.

If the portion of the name or number you know is at the beginning, simply enter the portion you know then click the **Find Now** button. Personal Call Manager will find all of the contacts that start with the letters or digits you entered.

If you remember the contact's first name, but not last name, enter a comma followed by the contact's first name. For example, if you are looking for a contact named Tom, enter “,Tom”. All of the contacts whose first name is Tom are found.

If the portion you know is not at the start, you can use “wild card” characters at the start of the name or number. There are two wild card characters you can use.

? Use the question mark to represent any single character.

* Use the asterisk to represent any characters that precede the characters you entered.

For example, the following names were added to the Address Book:

Chatterton Jones Mason Smith Stanley Steward Washington

- If you enter “S” the names found are **S**mith, **S**tanley and **S**teward.
- If you enter “Ste” the only name found is **S**teward.
- If you enter “?a” the names found are **M**ason and **W**ashington.
- If you enter “??a” the names found are **C**hatterton and **S**tanley.
- If you enter “*a” the names found are **C**hatterton, **M**ason, **S**tanley, **S**teward, and **W**ashington.

Tip: When you are using the Norstar TAPI Service Provider, you can also enter a comma (,) as a special character. This special character is used to add a pause between the numbers dialed. This feature is not supported by all TAPI Service Providers.

Editing the properties of a contact

The information stored with a contact can be changed whenever required. A typical example is when a contact moves or changes telephone numbers.

To change the properties of a contact using the right mouse button:

1. Find the contact in the Address Book.
You can find the contact manually or use the Personal Call Manager [Search feature](#).
2. Right click the contact.

- Click the **Properties** menu item.
The *Address Properties* dialog box appears.

The screenshot shows a dialog box titled "Johnson, Donna-Address Properties". It has four tabs: "Business", "EMail Address", "Settings", and "Note". The "Business" tab is active. The form contains the following fields:


- Name: Last: Johnson, First: Donna
- Address: 2421 - 37 Ave N.E.
- Title: Production Manager
- Company: Nortel
- Department: Documentation
- Office: ATA
- Assistant: Roger Munro
- City: Calgary
- State: Alberta
- Zip code: T2E 6Y7
- Country: Canada
- Phone number: Business 3429

Buttons: OK, Cancel, Help

- Move to the tab which has the information you want to change and then change it.

“[Adding a new contact to the Address Book](#)” on page 53 describes the information that can be entered.

To change the properties of a contact using the toolbar:

- Find the contact in the Address Book.
You can find the contact manually or use the Personal Call Manager [Search feature](#).
- Click the contact.
- Click .
The *Address Properties* dialog box appears.
- Move to the tab which has the information you want to change and then change it.

“[Adding a new contact to the Address Book](#)” on page 53 describes the information that can be entered.

To change the properties of a contact using the menu bar:

1. Find the contact in the Address Book.
You can find the contact manually or use the Personal Call Manager [Search feature](#).
2. Click the contact.
3. Click the **File** menu.
4. Click the **Properties** menu item.
The *Address Properties* dialog box appears.
5. Move to the tab which has the information you want to change and then change it.

“[Adding a new contact to the Address Book](#)” on page 53 describes the information that can be entered.

Organizing the Address book

As you add contacts to the Address Book, you should divide the contacts into logical groups. This will make it easier for you to find the contacts you have entered.

You group the contacts together by adding folders to the Address Book and moving your contacts into the appropriate folders. A simple example is to add two folders, one named Personal and one named Business. All of your business contacts would then be stored together in one folder and all of your personal contacts would be in another. For more information, refer to “[Creating a new folder in the Address Book](#)” on page 70.

Copying a contact

When you copy a contact, you are creating a new contact in the Address Book that is based on the original contact. Personal Call Manager provides two ways to copy a contact: a linked copy and a template copy. In the linked copy, all of the information about the contact is copied. In a template copy, all of the information about the contact except the contact name is copied. In both methods of copying the original contact remains in the original folder.

Deciding which copy method to use

The copy method you choose depends on what you want to do.

In a linked copy, Personal Call Manager links the copy to the original. When you change one of the properties of the contact, Personal Call Manager automatically updates the original contact and all of the copies of the contact. This ensures that all of your copies of the contact are updated. Use this copy method when you want to have identical copies of a single contact in several different folders so the contacts are easier to find and organize. For information about how to make a linked copy of a contact, refer to “[Copying a contact using the linked copy method](#)” on page 65.

In a template copy, Personal Call Manager does not link the new contact to the original contact. The most common use of the template copy feature is to create a new contact that is similar, but not identical to, an existing contact. For example, a new person joins a company you deal with. The address and telephone number of the new contact is the same, but the name is different. For information about how to make a template copy of a contact, refer to [“Copying a contact using the template copy method”](#) on page 66.


Copying a contact using the linked copy method

Use this method of copying a contact when you want to create a copy that is linked to the original contact. For information about the two different methods of copying a contact, refer to [“Deciding which copy method to use”](#) on page 64.

To copy a contact using drag and drop, the contact must be visible in the List View and the folder you are copying it to must be visible in the Tree View. To copy a contact:

1. Press and hold the **Control** key on your PC keyboard.
2. Click the contact you want to copy.
3. Drag the contact to the folder you want the contact copied to.

To copy a contact using the toolbar:

1. Click the contact you want to copy.
2. Click .
3. Open the folder you want to copy the contact into.
The contents of the folder appear in the List View box.

4. Click .

The contact is copied to the new folder.

To copy a contact using the right mouse button:

1. Right click the contact you want to copy.
2. Click the **Copy** menu item.
3. Open the folder you want to copy the contact into.
The contents of the folder appear in the List View box.
4. Right click an open area in the folder.
5. Click the **Paste** menu item.

The contact is copied to the new folder.

To copy a contact using the menu bar:

1. Click the contact you want to copy.
2. Click the **Edit** menu.
3. Click the **Copy** menu item.
4. Open the folder you want to copy the contact into.
The contents of the folder appear in the List View box.
5. Click the **Edit** menu.
6. Click the **Paste** menu item.

The contact is copied to the new folder.

Copying a contact using the template copy method

Use this method of copying a contact when you want to create a new contact that is based on an existing contact. All of the contact information except the contact name is copied to the new contact. This feature allows you to quickly add contacts that are similar to existing contacts. For information about the two different methods of copying a contact, refer to "[Deciding which copy method to use](#)" on page 64.

To copy a contact using the right mouse button:

1. Right click the contact you want to copy.
2. Click the **Copy** menu item.
3. Open the folder you want to copy the contact into.
The contents of the folder appear in the List View box.
4. Right click one of the contacts in the folder.
The contact clicked on is not affected by the pasting procedure.
5. Click the **Paste Special** menu item.
You are prompted to enter a name.
6. Enter the name of the contact and click the **OK** button.

After the contact is copied into the folder, you can open the contact properties and change any properties that are required.

To copy a contact using the menu bar:

1. Click the contact you want to copy.
2. Click the **Edit** menu.
3. Click the **Copy** menu item.
4. Open the folder you want to copy the contact into.
The contents of the folder appear in the List View box.

5. Click the **Edit** menu.
6. Click the **Paste Special** menu item.
You are prompted to enter a name.
7. Enter the name of the contact and click the **OK** button.

After the contact is copied into the folder, you can open the contact properties and change any properties that are required.

Moving a contact


Contacts can be moved from one folder to another to help organize the Address Book. When you move a contact, the contact does not remain in the original folder.

To move a contact using drag and drop, the contact must be visible in the List View and the folder you are moving it to must be visible in the Tree View. To move a contact:

1. Click the contact you want to copy.
2. Drag the contact to the folder you want the contact moved to.

To move a contact using the toolbar:

1. Click the contact you want to move.

2. Click .
The icon for the contact dims.

3. Open the folder you want to move the contact into.
The contents of the folder appear in the List View box.

4. Click .

The contact is moved to the new folder.

To move a contact using the right mouse button:

1. Right click the contact you want to move.
2. Click the **Cut** menu item.
The icon for the contact dims.
3. Open the folder you want to move the contact into.
The contents of the folder appear in the List View box.
4. Right click an open area in the folder.
5. Click the **Paste** menu item.

The contact is moved to the new folder.

To move a contact using the menu bar:

1. Click the contact you want to move.
2. Click the **Edit** menu.
3. Click the **Cut** menu item.
The icon for the contact dims.
4. Open the folder you want to move the contact into.
The contents of the folder appears in the List View box.
5. Click the **Edit** menu.
6. Click the **Paste** menu item.

The contact is moved to the new folder.

Tip: After you have used the Cut command (indicated by the contact icon dimming), you must use the Paste command to move the contact before using the Cut or Copy commands again. If you use the Cut or Copy command before pasting the contact, the contact remains in the original folder and does not move.

Deleting a contact

To delete a contact using the right mouse button:

1. Right click the contact you want to delete.
2. Click the **Delete** menu item.

To delete a contact using the menu bar:

1. Click the contact you want to delete.
2. Click the **Edit** menu.
3. Click the **Delete** menu item.

To delete a contact using the keyboard:

1. Click the contact you want to delete.
2. Press the **Delete** key.

Printing Contacts

There are two printing formats you can use to print information about any of the contacts stored in the Address Book. You can print a contact list or contact details.

Printing a contact list

When you print a contact list, the name, company, and telephone numbers stored in the Address Book for the contact are printed. You can print contact list information for one contact or many contacts.

Note: When printing a contact list, set your page orientation to landscape.

To print a contact list:

1. Click the contact or contacts you want.

Note: Use the Control or Shift keys to select more than one contact.

2. Click the **File** menu and then click the **Print Contact List** menu item.

OR

Click .

3. Click the **OK** button.

To print a contact list for all of the contacts in a folder:

1. Click the folder or folders which contain the contacts you want to print.

Note: Use the Control or Shift keys to select more than one folder.

2. Click the **File** menu and then click the **Print Contact List** menu item.

OR

Click .

3. Click the **OK** button.

Print Contact Details

When you print the contact details, all of the information stored in the Address Book for the selected contact is printed. You can print contact detail information for one contact or many contacts.

To print contact details:

1. Click the contact or contacts you want.

Note: Use the Control or Shift keys to select more than one contact.

2. Click the **File** menu and then click the **Print Contact Detail** menu item.

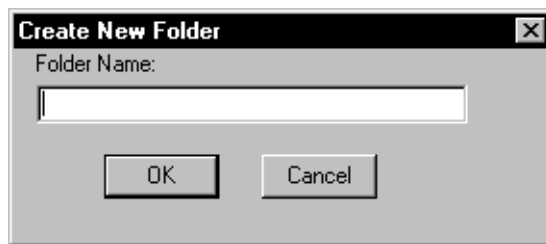
Folders

Folders can only be added to the My Contacts section and the folders within this section. You cannot add folders to the [Quick Dials](#) section.

Creating a new folder in the Address Book

To create a new folder using the right mouse button:

1. Click a folder in the Tree View of the Address Book. The contents of the selected folder appear in the List View. The new folder is added to the contents of the folder shown in the List View.
2. Right click an open area in the List View.
3. Point to the **New** menu item and then click the **Folder** menu item. The *Create New Folder* dialog box appears.



4. Type the name of the new folder and then click the **OK** button. The new folder is added to the selected folder.

When naming the new folder, you must use a name that does not already exist in the selected folder.

To create a new folder using the toolbar:

1. Click a folder in the Tree View of the Address Book. The contents of the selected folder are shown in the List View. The new folder is added to the contents of the folder shown in the List View.

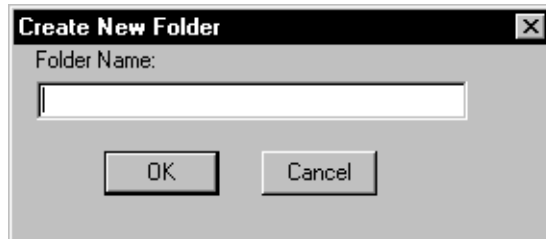
2. Click . The *Create New Folder* dialog box appears.

3. Type the name of the new folder and then click the **OK** button. The new folder is added to the selected folder.

When naming the new folder, you must use a name that does not already exist in the selected folder.

To create a new folder using the menu bar:

1. Click a folder in the Tree View of the Address Book. The contents of the selected folder are shown in the List View. The new folder is added to the contents of the folder shown in the List View.
2. Click the **File** menu.
3. Point to the **New** menu item and then click the **Folder** menu item. The *Create New Folder* dialog box appears.



4. Type the name of the new folder and then click the **OK** button. The new folder is added to the selected folder.

When naming the new folder, you must use a name that does not already exist in the selected folder.

Copying a folder

When you copy a folder, the folder and all of the contacts and folders contained in the folder are copied to the new folder.



To copy a folder using drag and drop, the folder must be visible in the List View and the folder you are moving it to must be visible in the Tree View. To copy a folder:

1. Press and hold the **Control** key on your PC keyboard.
2. Click the folder you want to copy.
3. Drag the folder you are copying to the folder you want the it copied to.

To copy a folder using the right mouse button:

1. Right click the folder you want to copy.
The folder must be in the List View box to use the right mouse button.
2. Click the **Copy** menu item.
3. Open the folder you want to copy the folder into.
The contents of the folder appear in the List View box.
4. Right click an open area in the List View box.
5. Click the **Paste** menu item.

To copy a folder using the toolbar:

1. Click the folder you want to copy.
2. Click .
3. Open the folder you want to copy the folder into.
The contents of the folder appear in the List View box.
4. Click .

To copy a folder using the menu bar:

1. Click the folder you want to copy.
2. Click the **Edit** menu.
3. Click the **Copy** menu item.
4. Open the folder you want to copy the folder into.
The contents of the folder appear in the List View box.
5. Click the **Edit** menu.
6. Click the **Paste** menu item.



Moving a folder

Folders can be moved from one enclosing folder to another. When you move a folder, you move the folder and all of the contacts and folders contained within.

To move a folder using drag and drop, the folder must be visible in the List View and the folder you are moving it to must be visible in the Tree View. To move a folder:

1. Click the folder you want to move.
2. Drag the folder you are moving to the folder you want it moved to.

To move a folder using the toolbar:

1. Click the folder you want to move.
2. Click .
3. Open the folder you want to move the folder into.
The contents of the folder appear in the List View box.
4. Click .

To move a folder using the right mouse button:

1. Right click the folder you want to move.
The folder must be in the List View box to use the right mouse button.
2. Click the **Cut** menu item.
3. Open the folder you want to move the folder into.
The contents of the folder appear in the List View box.
4. Right click an open area in the folder.
5. Click the **Paste** menu item.

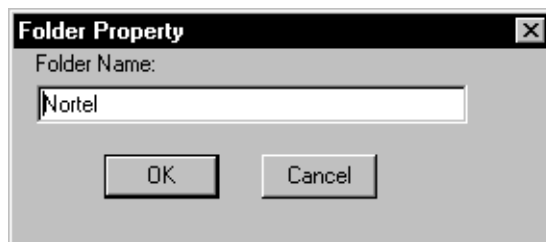
To move a folder using the menu bar:

1. Click the folder you want to move.
2. Click the **Edit** menu.
3. Click the **Cut** menu item.
4. Open the folder you want to move the folder into.
The contents of the folder appear in the List View box.
5. Click the **Edit** menu.
6. Click the **Paste** menu item.

Renaming a folder

To change the name of a folder using the right mouse button:

1. Right click the folder you want to rename.
2. Click the **Properties** menu item.
The *Folder Property* dialog box appears.



3. Type the new name of the folder.
4. Click the **OK** button.

To change the name of a folder using the toolbar:

1. Click the folder you want to rename.

2. Click .

The *Folder Property* dialog box appears.

3. Type the new name of the folder.
4. Click the **OK** button.

To change the name of a folder using the menu bar:

1. Click the folder you want to rename.
2. Click the **File** menu.
3. Click the **Properties** menu item.
The *Folder Property* dialog box appears.
4. Type the new name of the folder.
5. Click the **OK** button.

Deleting a folder

When you delete a folder, the folder and all the contacts and folders contained in the folder are deleted.

To delete a folder using the right mouse button:

1. Right click the folder you want to delete.
2. Click the **Delete** menu item.
3. Click the **OK** button to confirm deleting the folder and its contents.

To delete a folder using the menu bar:

1. Click the folder you want to delete.
2. Click the **Edit** menu.
3. Click the **Delete** menu item.
4. Click the **OK** button to confirm deleting the folder and its contents.

Importing Contacts

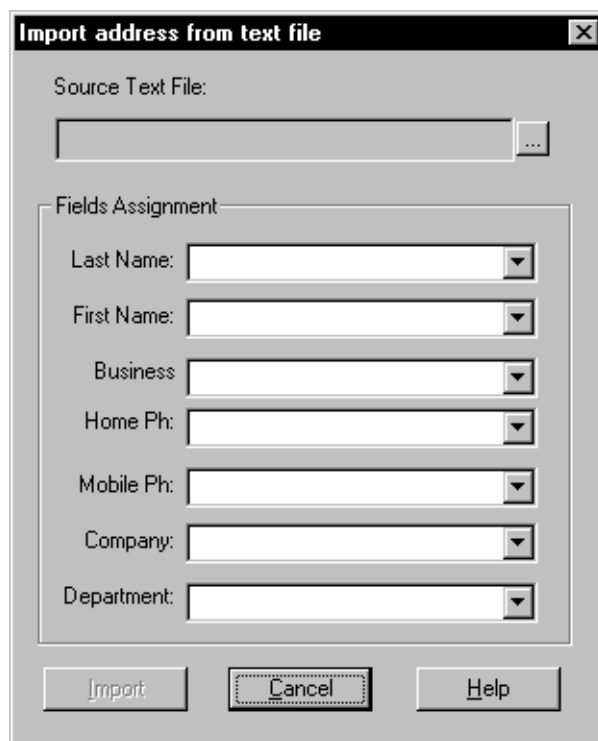
If you have a list of contacts in another application, you can save your list of contacts as a text file and then import those contacts into Personal Call Manager.


To import addresses:

1. Open the application that contains your existing contact list and save the list as a comma delimited text file. Make a note of the order of the information fields in the existing file.

Note: Refer to the documentation that came with the application for instructions on how to save the contact list as a comma delimited text file.

2. Open the Personal Call Manager main window.
3. Click the **File** menu and then click the **Import Address** menu item. The *Import address from text file* dialog box appears.



4. Click  to choose the file you want to import. The *Open* dialog box appears.
5. Move to the folder that contains the file you want to import.
6. Double click the file you want to import. The *Import address from text file* dialog box appears with the path and file name in the **Source Text File** field.

- Click the drop list arrow beside the **Last Name** field and click the text field number that contains the last name information.

Note: The text field number is determined by the order the information was in when you saved the file in step 1.

- Repeat step 8 for each of the information fields. Choose **None** if the information for the field is not in the file you are importing.
- Click the **Import** button.

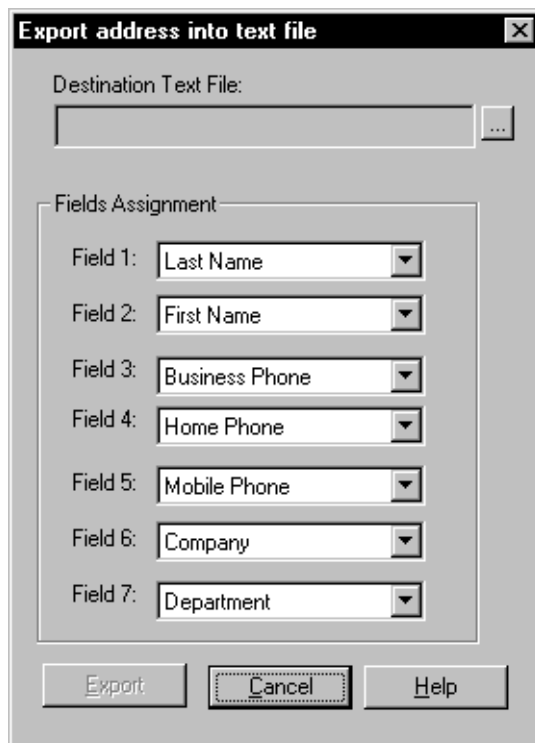
The contacts from the text file are added to your Address Book. You can now move the new contacts into their proper folders.


Exporting the Contacts

You can save all of the contacts in your Address Book into a comma delimited text file. This file can then be used in other applications. For example, you may want to add your contacts to a customer database or use the contacts to create a mailing list.

To export contacts:

- Click the **File** menu and click the **Export Address** menu item.
The *Export address into a text file* dialog box appears.



2. Click  to enter the name of the text file.
The *Save as* dialog box appears.
3. Move to the folder you want to store the text file in.
4. Type the file name into the **File name** field.
5. Click the **Save** button.
The *Export address into text file* dialog box appears with the path and file name in the **Destination Text File** field.
6. Click the drop list arrow beside **Field 1** and click the information you want to appear in the first field of the text file (e.g. Last Name).
7. Repeat step 7 until all of the fields are showing the information you want. For any field you do not want information in, click **None**.
Note: Only one type of information can appear in a single field.
8. Click the **Export** button.

All of the contacts in the Address Book are saved into a comma delimited text file.

Quick Dials

The Address Book is divided into two main sections: My Contacts and Quick Dials. The My Contacts section is used to store your contacts. The Quick Dials section is used to store contacts that you use frequently or need to access quickly.

The contacts that you add to the Quick Dials section are automatically added to the **Quick Dials** menu. The **Quick Dials** menu is accessed from the **Calls** menu or the Personal Call Manager task tray menu.

Adding Quick Dials

To add a Quick Dial, simply add the contact to the Quick Dials section of the Address Book. Any of the methods described earlier to [add](#) a contact can be used to add Quick Dials.

Displaying the information about Personal Call Manager

The *About Personal Call Manager* window shows the version number of the Personal Call Manager software you are using.

To access the About Personal Call Manager window:

1. Click the **Help** menu and then on the **About PCM** menu item.

OR

1. Click .

Synchronization with the telephone

When a Norstar telephone is connected to the Computer Telephony Adapter and you are using the Norstar TAPI Service Provider, common call control operations can be performed on either the telephone or on Personal Call Manager. For example, to end a call you can press the Rls (Release) key on the Norstar telephone or click Release in Personal Call Manager.

Any set programming you use to customize your telephone is not synchronized. For example, the personal speed dials programmed on the Norstar telephone are not automatically copied into Personal Call Manager.

On-line help

There are three methods of accessing the on-line help information for Personal Call Manager:

- from the toolbar
- from the keyboard
- from the menu bar

Accessing on-line help screens from the keyboard

You can access context sensitive help by pressing the **F1** key. The help information is about the currently active window or dialog box.

Opening the on-line help contents screen

From the menu bar, you can access the main window of the on-line help information. To access the main on-line help window:

1. Click the **Help** menu.
2. Click the **Help topics** menu item.

The main help window gives you access to all of the help information.

From the Contents tab, you can view all of the main topics of help. To move to one of the topics, double click that topic.

From the Index tab, you can view an alphabetically sorted list of help topics. The topics listed on the Index tab are more detailed than the topics shown on the Contents tab. To move to a particular topic, click the topic.

The main help window also has a Find tab. The Find tab allows you to enter a word or topic you need help information about. The help feature searches through the help information and displays any information about the word or topic you entered.

Accessing the Tip of the Day

The *Tip of the Day* window gives you helpful information about how to use Personal Call Manager.

To display the *Tip of the Day* window:

1. Click the **Help** menu.
2. Click the **Tip of the Day** menu item.

Turning the Tip of the Day off

The Tip of the Day window normally appears when you start Personal Call Manager.

To turn the Tip of the Day off:

1. Click the **Help** menu.
2. Click the **Tip of the Day** menu item.
3. Click the **Show Tips at Startup** check box.

When the **Show Tips at Startup** check box is blank, the *Tip of the Day* window does not appear when you start Personal Call Manager.

Turning the Tip of the Day on

To turn the Tip of the Day on:

1. Click the **Help** menu.
2. Click the **Tip of the Day** menu item.
3. Click the **Show Tips at Startup** check box.

When the **Show Tips at Startup** check box contains a check mark, the *Tip of the Day* window appears when you start Personal Call Manager.

Personal Call Manager Preferences

Personal Call Manager preferences determine how the Address Book is searched, how Personal Call Manager appears when you start it up, and whether the dialing rules are used.

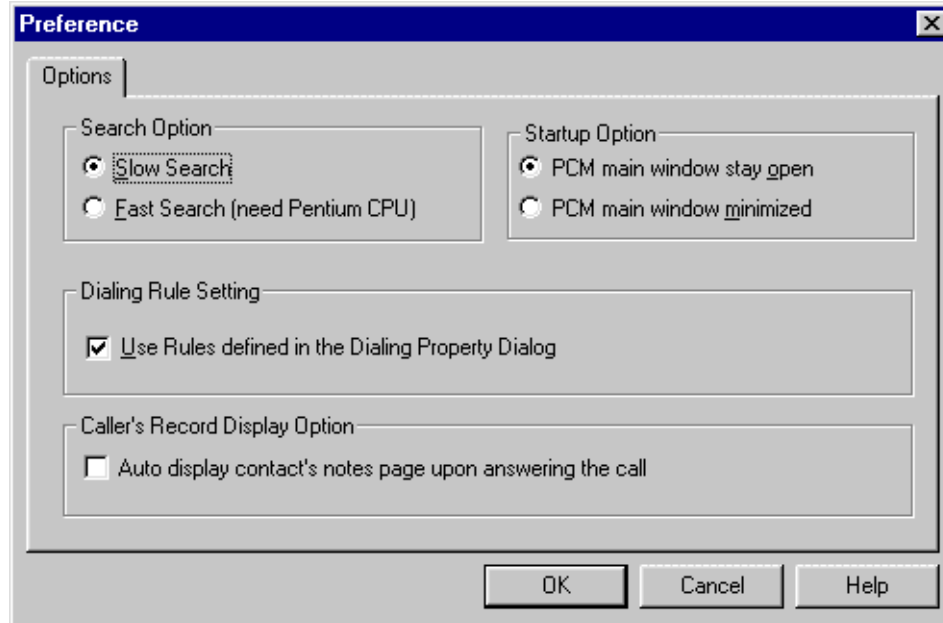
Changing the Search preferences

The Search feature operates in one of two different modes: Slow Search and Quick Search. In Slow Search mode, you enter the characters you want to find and then click the **Find Now** button. Personal Call Manager will then search through the Address Book to find the contact. In Quick Search mode, Personal Call Manager starts searching through the contacts as soon as you enter a character.

Tip: If you plan on using the Quick Search mode, your computer should be equipped with a Pentium processor or better. If you use a slower processor, the Fast Search mode still works, but there may be noticeable delays when entering information into the Search window.

To change the Search mode from the menu bar:

1. Click the **Tools** menu and then click the **Options** menu item. The *Options* dialog box appears.



2. Click the Search Option you want to use.

To change the Search mode from the task tray:

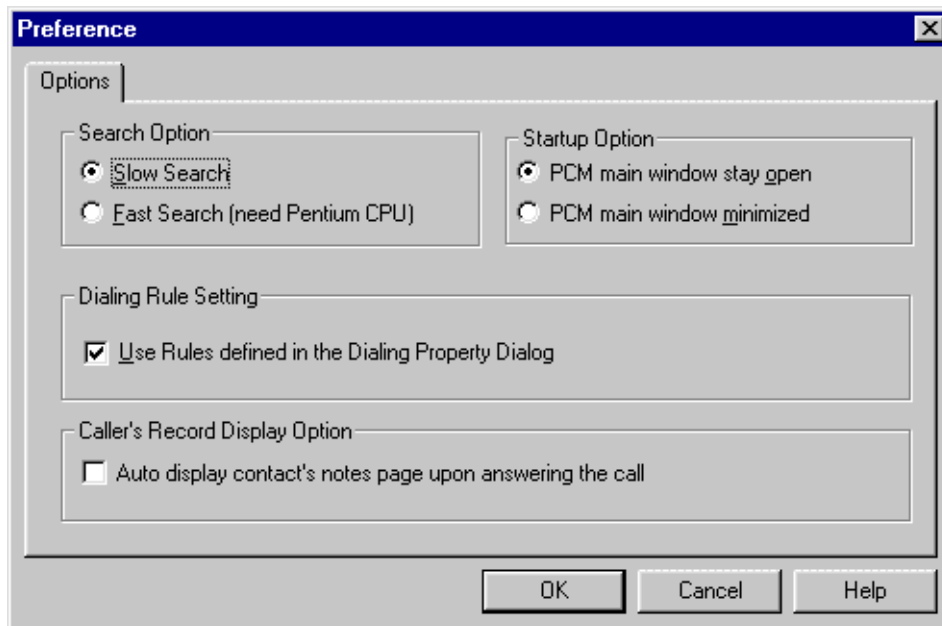
1. Right click the Personal Call Manager icon in the task tray.
2. Click the **Options** menu item.
The *Options* dialog box appears.
3. Click the Search Option you want to use.

Changing the Startup Option

The Startup Option determines if the main window is open or minimized when you start Personal Call Manager.

To change the Startup Option from the menu bar:

1. Click the **Tools** menu and then click the **Options** menu item.
The *Options* dialog box appears.



2. Click the Startup Option you want to use.

To change the Startup Option from the task tray:

1. Right click the Personal Call Manager icon in the task tray.
2. Click the **Options** menu item.
The *Options* dialog box appears.
3. Click the Startup Option you want to use.

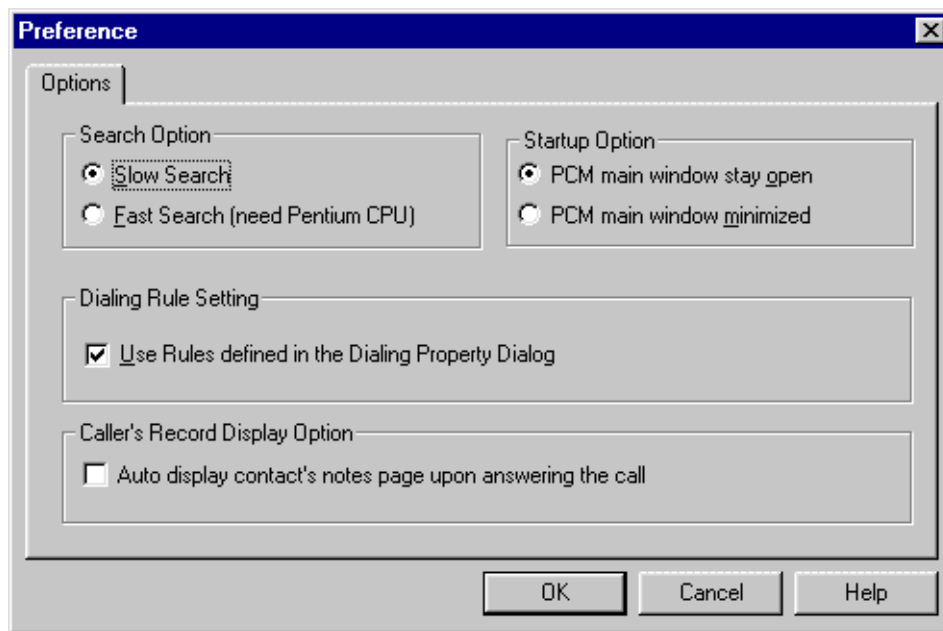
Changing the Dialing Rule Setting

The Dialing Rule Setting determines if the dialing properties entered in the *Dialing Properties* dialog box are used. This feature is enabled by default.

When the Dialing Rule Setting is on, Personal Call Manager uses dialing properties, such as the local area code and the outside line access code, when making a call. When it is disabled, Personal Call Manager does not use the dialing properties and you must manually enter any additional dialing information, such as the outside line access code.

To change the Dialing Rule Setting from the menu bar:

1. Click the **Tools** menu and then click the **Options** menu item.
The *Options* dialog box appears.



2. Click the **Use Rules defined in the Dialing Property Dialog** check box to change the setting.

To change the Dialing Rule Setting from the task tray:

1. Right click the Personal Call Manager task tray icon.
2. Click the **Options** menu item.
The *Options* dialog box appears.
3. Click the **Use Rules defined in the Dialing Property Dialog** check box to change the setting.

Changing the Caller's Record Display Setting

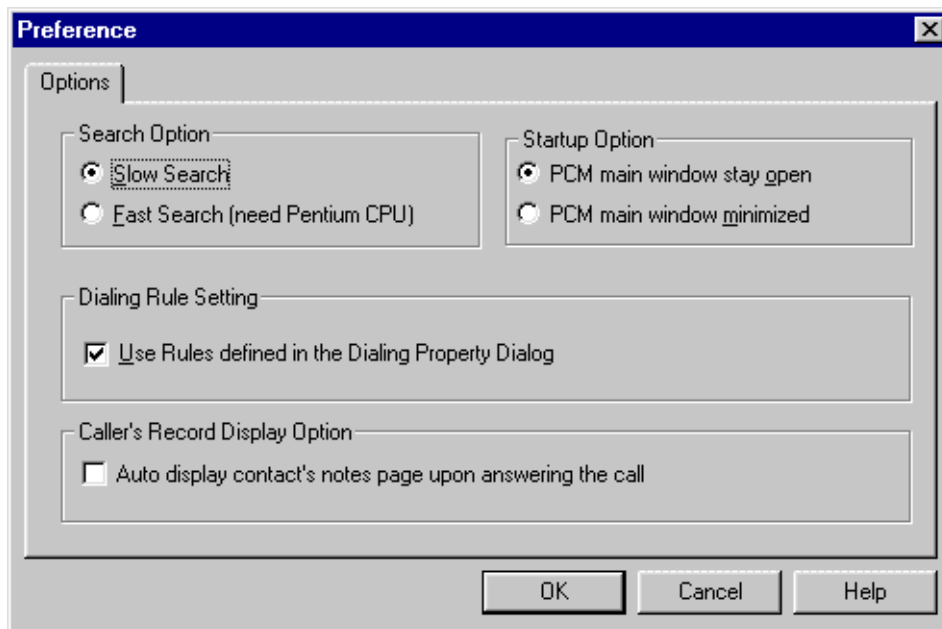
When the Caller's Record Display Setting is on, Personal Call Manager compares the incoming telephone number to the entries in the Address Book. If a match is found, the Notes tab of the *Address Properties* dialog box appears showing the information for that caller. If a match is not found, a dialog box appears asking if you want to add the caller to the Address Book.

Telephone numbers are only shown on the Callers List if:

- You subscribe to a Caller ID (CLID) service.
- OR
- Your TAPI Service Provider (such as the Norstar TAPI Service Provider) provides name or number information for internal calls.

To change Caller's Record Display Setting from the menu bar:

1. Click the **Tools** menu and then click the **Options** menu item.
The *Options* dialog box appears.



2. Click the **Auto display contact's notes page upon answering the call** check box to change the setting.

To change the Dialing Rule Setting from the task tray:

1. Right click the Personal Call Manager task tray icon.
2. Click the **Options** menu item.
The *Options* dialog box appears.
3. Click the **Auto display contact's notes page upon answering the call** check box to change the setting.

Quitting the PCM application

You can quit Personal Call Manager from the task tray or the main window.

To quit Personal Call Manager using the task tray:

1. Right click the Personal Call Manager icon in the task tray.
2. Click the **Exit** menu item.

To quit Personal Call Manager using the main window:

1. Click the **File** menu and then click the **Exit** menu item.

You can also quit Personal Call Manager by clicking on the close window button in the top right hand corner of the Personal Call Manager main window.

Removing the PCM application

In certain situations, you may want to remove Personal Call Manager from your computer. For example, when you get a new computer you will want to move Personal Call Manager to the new computer. The Uninstall program makes sure all of the files that comprise Personal Call Manager are removed from the computer hard disk.

Tip: If you are moving Personal Call Manager to a new computer, make a copy of the **PCMAAddressBook.mdb** file before you remove Personal Call Manager. You can then copy this file to the new computer where Personal Call Manager is installed. This copies all of the contacts you have added to the Address Book onto the new computer.

To remove the Personal Call Manager software:

1. Make sure you have quit from Personal Call Manager.
2. Click the Windows **Start** button and point to the **Settings** menu item.
3. Click the **Control Panel** menu item.
4. Double click the **Add/Remove Programs** icon.
5. Click **Personal Call Manager**.
6. Click the **Add/Remove** button.

All of the files associated with Personal Call Manager are removed from your computer hard drive.

Glossary

Address Book

The Address Book is the portion of Personal Call Manager where you store the telephone numbers and addresses of the people and businesses you deal with.

Call Forward

A feature that forwards all the calls arriving at your telephone to another telephone.

Calling Line Identification (CLID)

A service provided by the telephone company that allows you to see the caller's telephone number and in some cases the caller's name. If you subscribe to this service, Personal Call Manager can then show you the caller's name or telephone number on the PC screen.

Contact

A contact is any entry in the Address Book. A contact can be a person, business, or any number or address you want stored in Personal Call Manager.

Dialing properties

The dialing properties define where you are situated and what is required to dial from this location.

DN name

The name used to identify your telephone on the Norstar system.

Do Not Disturb

A feature that stops calls from ringing at your telephone. The *You Have a New Call* dialog box will still appear.

Handsfree

A feature you can use to make calls without using the telephone receiver.

Icon

A graphic symbol used to represent an object (such a contact or call) or a task (such as manual dialing) in Personal Call Manager.

Key system

A telephone communication system that provides advanced call control features. An example of a key system is the Norstar system.

List View

The portion of the Address Book that shows the contacts and folders stored in the selected folder.

Menu bar

The menu bar shows the menus available from the main window.

PBX

A telephone communication system that provides advanced call control features. An example of a PBX is the Meridian 1 system.

PC (Personal Computer)

A Windows 95™ compatible computer that runs the Personal Call Manager software.

Quick dials

A group of telephone numbers that you can call by selecting a menu item.

Status bar

An area at the bottom of the Windows 95™ screen which provides information messages about Personal Call Manager.

TAPI

TAPI stands for Telephony Application Programming Interface. It is a set of programming tools that allows Personal Call Manager to communicate with the telephone system.

TAPI line

The telephone line that Personal Call Manager uses to make a call.

TAPI Service Provider

The application that provides Personal Call Manager with access to the TAPI functions.

Task tray

An area in the bottom right hand corner of the Windows 95™ screen. It contains the Personal Call Manager task tray icon which is used to perform several common call control functions.

Taskbar

An area at the bottom of the Windows 95™ screen. It contains the Personal Call Manager taskbar icon which is used to maximize the Personal Call Manager Window or bring it to the foreground.

Tool bar

The tool bar contains several buttons that provide quick and easy access to Personal Call Manager functions

Tree View

The portion of the Address Book that shows how the folders used to store the contacts are organized.

Wild card character

A wild card character is a special character that can be used represent any letter or number.

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