Multi-Line Rack Mount System
Installation Instructions
for PhoneTree 3500

For Service and Support: 866.234.2943
support@phonetre.com

Specifications subject to change without notice.

PhoneTree™ is a registered trademark of Personal Communication Systems, Inc. The trademarked names used in this document are used for editorial purposes only and to the benefit of the trademarked owner with no intention of infringement of the trademark.
Thank you for your purchase of a PhoneTree® multi-line rack mount hardware system. In addition to your rack mount hardware, please check to see that you received the following components in your shipment:

- 8, 16, or 24-Port PhoneTree Rack Mount Hardware Specifications
- 24-port RJ11 Patch Panel (sold and shipped separately)
- USB Cable
- 25-pair/50-pin Telco Cable
- Power Transformer and 3-prong Power Cord
- PhoneTree Software
- User Guide
- Headset Microphone

**System Requirements (Minimum)**

- Intel Pentium 4 or equivalent processor
- PhoneTree is not compatible with Windows 3.1, Windows 95, Windows 98, Windows Me, Windows NT, or Mac OS.
- RAM: Windows 2000 .................... 512 MB
- Windows XP ...................... 512 MB
- Windows Server 2003 ........... 512 MB
- Windows Vista..................... 1 GB
- Hard Drive Space: 1 GB
- CD ROM Drive
- Color Monitor (SVGA) with 1024 x 768 resolution
- One High-Speed USB 2.0 port per unit

**Note:** There are no user-serviceable parts. For assistance with your PhoneTree rack mount hardware, please contact PhoneTree Customer Support.

In addition to the above requirements, the computer hosting PhoneTree must be:

- Accessible for use in the server room or rack space.
- Configured and installed on the client network.
- Able to access the Internet for initial configuration, to receive online training and in case of any future technical support needs from PhoneTree Customer Support.

**Note:** PhoneTree is designed to allow operation in the background. However, we cannot guarantee compatibility or problem-free operation with other programs.
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- Color Monitor (SVGA) with 1024 x 768 resolution
- One High-Speed USB 2.0 port per unit
  Note: If you do not have any available USB ports, you will need to purchase a new host controller card. For more information, please contact Customer Support.

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Installation Steps

To ensure a successful installation, complete the following steps in order. Please note that the instructions here are unique for this product and supersede any information shown in the User Guide unless otherwise noted. If you need assistance with these steps or any other aspect of your PhoneTree rack mount system, please call 866.234.2943 (8:30 a.m. to 5:30 p.m. EST M-F).

1. Software Installation
   Note To Windows Vista users: User Account Control (UAC) must be disabled before you can install the PhoneTree software. Please visit http://www.phonetree.com/docs/VistaInstallation.pdf for instructions.
   1. Load the PhoneTree Installation CD into your PC. From the Installer Menu, choose Install PhoneTree Software and enter the supplied Serial Key (found on the inside of the software case) when prompted. To install Adobe Reader, relaunch the Installer Menu. If you plan to use the PhoneTree Client software for limited remote access of your PhoneTree system from a networked PC (see page 131 of the User Guide), launch the Installer Menu from that PC.
   2. Click on Next several times until the installation process starts. In order to assure reliable operation and ease of service, please DO NOT change the default installation information as it is presented.
   3. If asked, choose “Yes, I want to restart my computer now” and click Finish. Do not start the PhoneTree program at this time.
   4. Repeat this process for both the Female and Male Voice CDs, installing the Female Voice first.

2. Hardware Installation
   Note: The following connections must be made in the order shown.
   A. Connect the Telco Cable
      Connect the 25-pair/50-pin telco cable to the PhoneTree rack mount hardware and tighten the screw. Next, connect the other end of the telco cable to the 24-port RJ11 patch panel and tighten the screw. Ensure there is a solid connection on each end of the cable to prevent it from becoming dislodged. Then, install a standard analog phone cable to each line on the patch panel. Note: For information on connecting your 25-pair/50-pin telco cable to a phone system not using the 24-port RJ11 patch panel, please contact your phone system manufacturer.
   B. Connect the Power Transformer
      Plug the 3-prong power cord into the power transformer. Next, plug the round 5-pin connector into the back of the rack mount. Then, plug the 3-prong power cord into the wall outlet.
   C. Connect the USB Cable
      Connect the USB cable from the PhoneTree rack mount hardware to your PC’s USB jack (the PhoneTree rack mount hardware must be connected to a High-Speed USB 2.0 port). Wait for Windows to recognize each purchased PhoneTree line. Your PC may prompt you for permission to load the hardware drivers. If prompted, click “Continue Anyway” to proceed. Repeat until all lines are installed. For more information on this step, see page 12 in the User Guide.

3. Test Lines
   Once you have completed the above steps, you should test each phone line to ensure connectivity (the headset microphone is required for this step).
   Start by opening the PhoneTree software and clicking the Admin tab. Then, click the Configure Phone Lines icon. Each line detected by the PhoneTree hardware will appear in the Select line box on the left. Make sure the correct number of lines appear here and no dashes are before and after each number (i.e., -4-). If lines are missing, please contact PhoneTree Customer Support. To make sure each line is ready to be tested, select them one-by-one and verify the Detected dot is green. Once you have checked each line, select a line and click Test Line.
   Before you can make a test call, you must connect the headset microphone to the front of the rack system. Insert the microphone plug into the MIC jack and the headset plug into the SPKR jack. To make sure each selected line has a dial tone, click Get dialtone and listen. Adjust the Volume slider as needed. To make a phone call, enter a phone number (the use of dashes and spaces to separate the phone number is optional) in the Number to dial box (i.e., your cell phone). Then, click Dial number. Click Say Hello once you have answered the call to test playback. Repeat for each line.
   Once you have tested each line, your PhoneTree rack mount system is ready for use.
Multi-Line Rack Mount System

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Thank you for your purchase of PhoneTree® multi-line rack mount hardware. To assist you receiving the housing components in addition.

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