Using Remote Operation

For PhoneTree 2100, 2500, 3500, and VoiceWave™ Series models

**Question:** How do I use Remote Operation?

**Answer:** Remote Operation lets you call in to your PhoneTree system and access most major functions including recording your message, selecting who to call, changing the calling times and more. To use this feature:

1. **Enabling Remote Operation**
   a. On the PhoneTree desktop, rest your mouse pointer on the Icon for which you want to enable Remote Operation and make note of the number that appears (e.g., PhoneTree 001). Then, click on the icon.
   b. Once the List Editor screen appears, click the Options icon from the top toolbar, and then click the Remote tab.
   c. Check the Enable Remote Calling box. Enter a 4-digit PIN code that you will use to access this Icon.
   d. (Optional) Check the Override “Time/Days” tab settings to allow remote call session to begin immediately box only if you know that you will want to use Remote Operation outside the pre-set call window settings you entered on the Time/Days tab.
   e. To select the Calling List file to be used when PhoneTree calls remotely, click Browse to select a file on your computer (the Lists available to PhoneTree will appear in the box at right). **Note:** This file must be selected in advance (i.e., now, while using this tab) and will be used for remote calling regardless of which file was last loaded into PhoneTree.
   f. Select the default call mode: List (call the entire List) or Group (call one or more Groups in the List). This can be changed when you call in using the Remote Menu. Click OK when finished. Then, click Exit from the top toolbar.

2. **Enabling a Line as a Call-In Line**
   a. From the Admin desktop, click the Configure Phone Lines icon.
   b. Select one or more of the available line(s) to be used as call-in line(s) from the list on the left.
   c. In the Line Use area, select Make calls if the line will be used to place calls and check Line may answer when not making calls if you want the line to automatically switch to being a call-in line whenever it is not being used to make calls — with this method you may not be able to call-in on this line while calls are being made. Select this option if you have only one line installed. Select Answer calls only if the line will be used only for incoming calls.
   d. Make a note of the phone number associated with this line so you can call in later.
Using Remote Operation, continued

3. Making the PhoneTree System Available

Before you call in, make sure that the PhoneTree computer is on, the PhoneTree hardware is correctly connected to the computer and the PhoneTree software is running with the Call Center is displayed. This needs to be the case anytime you try to call in, otherwise the PhoneTree system will not answer, even if the Remote settings are correctly configured.

4. Calling In

When calling in, you must select your PhoneTree icon by typing in its number (see step 1a) and enter the appropriate PIN code (see step 1c).

Example: To select PhoneTree “001” with PIN code “5678”:

a. Call in to your PhoneTree system and wait for an answer
b. At the voice prompt press [*] [1] [#] on your touch-tone keypad*
c. Press 1 to confirm your selection (or press 2 again)
e. You will be greeted with the Remote Main Menu (see below)

Remote Main Menu

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>[*] Repeat Menu</td>
<td>[*] Repeat Menu</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[#] Main Menu</td>
<td>[#] Main Menu</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>[*] Repeat Main Menu</td>
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</tr>
</tbody>
</table>

† The GROUP menu items are not played unless Call Group is selected. Also, since there are 36 groups to choose from, the following table may be of assistance in selecting the proper group(s) to call:

<table>
<thead>
<tr>
<th>0 = 0</th>
<th>1 = 1</th>
<th>2 = 2</th>
<th>3 = 3</th>
<th>4 = 4</th>
<th>5 = 5</th>
<th>6 = 6</th>
<th>7 = 7</th>
<th>8 = 8</th>
<th>9 = 9</th>
<th>10 = A</th>
<th>11 = B</th>
<th>12 = C</th>
<th>13 = D</th>
<th>14 = E</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 = U</td>
<td>31 = V</td>
<td>32 = W</td>
<td>33 = X</td>
<td>34 = Y</td>
<td>35 = Z</td>
<td></td>
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*PhoneTree plays the Standard InfoLine Greeting and requires you to press the Star (*) key to identify you as a Remote user and to prevent unauthorized use of your Remote system.
Troubleshooting

If you try to access your PhoneTree system remotely and...

...calls are currently being placed:
- You will be asked to “Please wait”
- Once the calling has stopped, you will be asked to select:
  1. To stop the current call session
  2. To Exit and allow calls to resume

  **Note:** You will interrupt any calls in progress and the call job you enable remotely will be initiated instead.

...the Remote feature is disabled:
- You will be instructed to use the PhoneTree software to enable Remote Operation.
- This must be done in advance from the PhoneTree computer and may not be done remotely.

...it does not answer:
- Make sure the PhoneTree computer and PhoneTree hardware are ON and the PhoneTree software is displaying the Call Center.
- The **Line may answer when not making calls** setting is unchecked for this line (see step 2c).
- Confirm you are using the correct telephone number for the line assigned to the PhoneTree system.
- Make sure the line assigned to the PhoneTree system is not shared with another device (FAX machine, etc.) that may be set to answer calls.