

IMPORTANT

Registration Settings:

<i>SERIAL NUMBER:</i>	
<i>COMPUTER ID:</i>	
<i>REGISTRATION NUMBER:</i>	

Once you have your TALITY software functioning properly copy your phone system settings onto this page and save it for future reference

<i>PORT:</i>	
<i>SPEED:</i>	
<i>PARITY:</i>	
<i>DATA BITS:</i>	
<i>STOP BITS:</i>	
<i>PBX TYPE:</i>	
<i>DATE SELECTION (PBX OR COMPUTER):</i>	

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Introduction

Introduction - Overview

TALITY is a call management and accounting software package designed to report on phone activity of a business.

The program's interface is user friendly and the amount of data entry is reduced to the minimum in order to fit the busy schedules of the personnel and practically eliminate software training. In a very smooth, consistent and comprehensible way our product deals with the check in and billing procedures, report printing, surcharges, multipliers, pricing etc.

Here are just some of the features:

- P.M.S. – Interface for all Property Management Systems on the market today.
- Credit limit.
- Fully flexible pricing with surcharges.
- Multiple extension assignment under one room.

TALITY supports:

- Unlimited telephone extensions.
- Unlimited number of telephone lines
- Unlimited number of users

System Requirements

System Requirements

- Pentium™ II Based PC
- 128 MB RAM
- Microsoft™ Windows 98/NT/2000
- 250 MB free disk space
- One RS232 port connection to the PBX® SMDR port
- Printer driver must be installed on your system
- Power Management feature of your system must be disabled

Assumptions

This manual assumes that you are familiar with using a mouse, as well as with the common Microsoft Windows elements i.e. Scroll Bars, Selecting Menu Items etc. For detailed description on these elements please refer to Microsoft Windows User Guide.

Installation

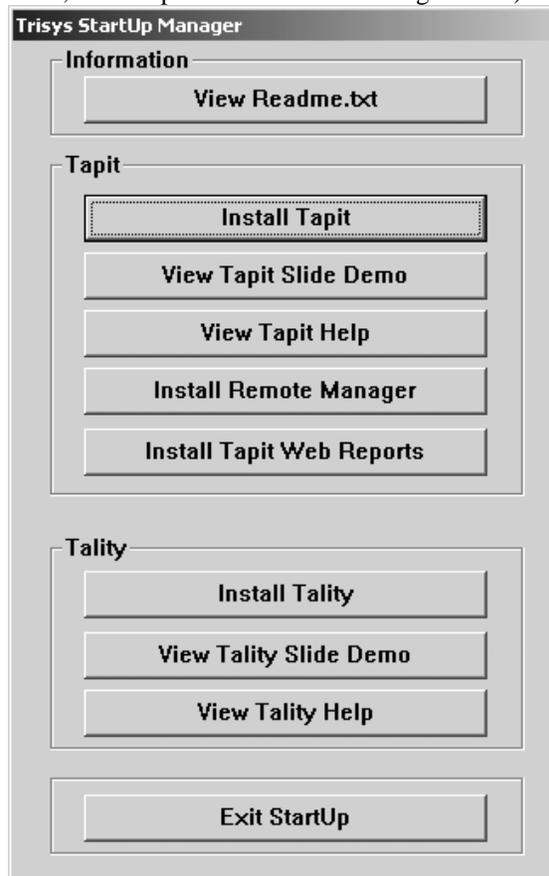
Before installing your software

In an effort to separate possible hardware and software issues we need to confirm the presence of clear SMDR data (this will tell us if the connection between PBX and computer is intact). To do that we'll use communications software called HyperTerminal®, which comes bundled with Microsoft® Windows. Please follow the steps below:

1. Click on **Start**
2. Click on **Programs**
3. Click on **Accessories**
4. Click on **HyperTerminal®**
5. Double-click **Hypertrm.exe**
6. Enter name for session, i.e. SMDR Test. Click **OK**
7. Using the arrow on the right of **Connect using:** select **Direct to Com X** (where X= the number of the comport connected to the PBX). Click **OK**
8. Configure COM Port settings as per PBX specifications. Click **OK**
9. Proceed with Step 10, unless you get a message **Unable to open Com X**. If you see this message, you will need to change the X value (use a different Com Port). Here is what you need to do:
 - Click **File** on the Menu Bar
 - Click **New Connection**
 - Go back to Step 6
10. You should see "Connected" in the left lower corner with elapsed time counter.
11. At this stage, if you have everything configured properly, every time you hang up after a completed call, you should see legible call data displayed on the screen.
12. If clear data is displayed write down communication parameters and exit **HyperTerminal**. Now you can proceed with the installation of Trisys, Inc. software.
13. However, if NO data or "garbled" is displayed you may have a problem with either your cable (between PBX and the Com Port) or PBX's SMDR port. At this stage you should contact your Phone Dealer for help.

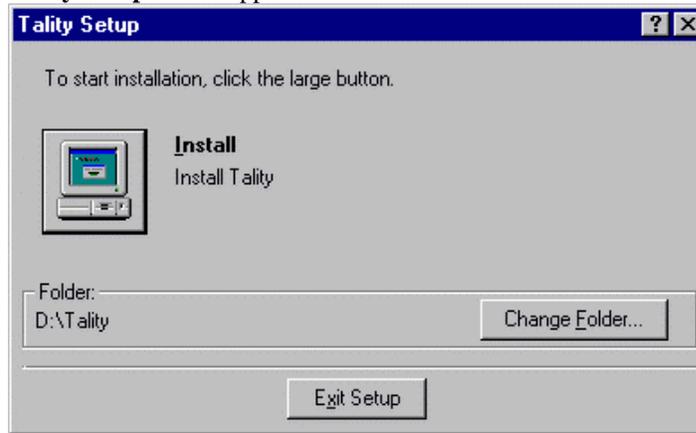
Installing TALITY

1. Insert **Call Accounting Software** CD into the CD ROM drive. **Trisys StartUp Manager** screen is displayed.
(If this screen is not displayed automatically then use the Run command on the Start (Windows) menu by typing D:\Startup.exe, where D is represents your CD ROM drive, in the Open text box and clicking on OK.)



2. Click on **Install TALITY. Tality Setup** screen appears.
3. Click on the **Continue** button. Tality is searching for the installed components.
4. Click on the **OK** button on the next screen to install Program in Tality folder on drive C: or click on the **Change Folder** button to change a destination drive or folder (must be local drive with available required free disk space).

Tality Setup screen appears.



5. Click on the **Install** button to continue (or click on the **Change Folder** button to change a destination drive or folder).
Program installs Tality files and updates your system.
6. Program displays a message asking if your Tality software has a serial number. If you have a serial number click on **YES**, otherwise click on **NO** and Tality will be installed as a trial version.
7. Tality displays **Enter Serial Number** screen. Enter your software's serial number. Click on **OK**
8. The serial number is being processed. Product information message is displayed. Click on **OK**
9. Setup program displays a registration message as a reminder to register TALITY software.
It is very important to register your Tality promptly since it will stop functioning if you fail to do so within 30 days from the date of installation.
For registration instructions refer to the Registration.txt file on the CD or the company website - www.trisys.com (option Registration).
10. When installation is completed the setup program displays a message "Tality Setup was completed successfully". Click on **OK**. It is recommended to restart the computer.

Registration

It is very important to register your software promptly; otherwise, it will stop functioning within 30 days from the date of installation.

For registration instructions refer to the Registration.txt file on the CD or the company website - www.trisys.com (option Registration).

Getting Started

Setting up SMDR Monitor

1. Assuming you have restarted the computer **SMDR Monitor** should start automatically and run minimized. Restore **Monitor's** window.
2. Click on the **Action** menu. Check if SMDR Monitor is connected to COM port (**Connect** option is dimmed). If it is connected click on **Disconnect**, otherwise proceed with pt. 3.
3. Open **Settings**.

SMDR Monitor32 Settings

Monitor COM Port Options:

Port: COM1

Baud Rate: 1200

Data Bits: 7

Parity: Even

Stop Bits: 1

Flow Ctrl: DTR/DSR
 RTS/CTS
 XON/XOFF

COM Buffer Size: 256

Display Options:

Autowrap
 Add Line Feed

Control Options:

Write Log File TELMSG.DAT
 Display Errors
 Always on Top

OK
Cancel

Setting up Monitor Settings establishes proper communication between your computer and the telephone system.

TALITY COM Port Options

Port - click on the **down arrow** icon in the **Port** field to select a port on the computer the SMDR cable is connected to.

Baud Rate - click on the **down arrow** icon in the **Baud Rate** field to select a transmission speed the phone system is set at.

Data Bits - click on the **down arrow** icon in the **Data Bits** field to select a data bits setting of the phone system.

Parity - click on the **down arrow** icon in the **Parity** field to select a parity setting of the phone system.

Stop Bits - click on the **down arrow** icon in the **Stop Bits** field to select a stop bits setting of the phone system.

Flow Ctrl. - check an appropriate box to select a flow control parameter that may be required by the PBX (refer to PBX's documentation).

Com Buffer Size - a number of characters SMDR Monitor will hold in the memory buffer before saving data to the hard disk of the computer (recommended setting is 80).

Control Options

Write Log File TELMSG.DAT - check this box if you wish TALITY to save raw SMDR information in the separate file (TELMSG.DAT in directory where TALITY files reside).

Display Errors - check this box if you wish TALITY to display communication errors in the SMDR Monitor window.

Always on top - check this if you wish SMDR Monitor icon or window to stay always on the foreground of the desktop.

Display Options

Autowrap - if PBX SMDR string is longer than can fit on the screen, check this option to force the string to wrap to the next line.

Add Line feed - check this box if you wish to have a blank line inserted between SMDR call records (it may improve readability of SMDR records displayed on the SMDR Monitor).

1. Click on **OK** to save the changes.
2. Go to **Action** menu.
Click on **Connect** to establish connection with the COM port.
Leave the **Monitor** running for TALITY to collect calls.

Setting up TALITY

Controls

System Parameters

1. Click on **Controls** and open **System Parameters**.

System Parameters

Telephone System: Northern Telecom SL1

Use Date From

Computer
 Phone System

Store Calls

Both
 Outgoing Calls Only
 Incoming Calls Only

Minimum Call Length

(hh : mm : ss)
00 : 00 : 00

Custom Pricing Increments

First Minute: 6 Secs
Next Minute: 6 Secs

Additional Parameters

Your Telephone Number: (973)-593-8200
Price Calls Every: 15 Minutes Default Credit Limit: 50.00
Full Access Password: Second Level Password:
Third Level Password: Report Page Length: 60 Lines
Save Archived Calls For: 3 Months

Day: Sun at 02:00

Auto Archive/Optimize Run: Weekly on Sun at 02:00
 Show Authorization Code On Reports
 Price Operator Calls
 Surcharge Operator Calls
 Disable V+H Pricing
 Disable Credit Limit Checking
 Separate V+H Long Distance and International Rates
 Do Not Print Zero Cost Calls on Bill
 Still print Bill when Guest/User owes recurring charge ONLY
 Remove Guest/User After Billing (Default)

Tax	Description
1: 6.00%	State
2: 3.00%	Local
3: 10.00%	Trisys Tax

Report Header: Financial Northeastern Companies
Report Footer: (Bills)

OK Cancel

2. Enter appropriate values and descriptions for your system using the guidelines below.

TELEPHONE SYSTEM field allows you to change the make and the model of the telephone system to which TALITY is connected.

Press on the down arrow of the Telephone System text box to invoke the list of the available telephone systems. Click on the name of your phone equipment.

USE DATE FROM - The date information comes from either the telephone system or the clock in your PC. You should select **Computer** only if you have a clock-calendar in your PC or if your phone equipment does not generate date information on the SMDR output.

STORE CALLS - select what type of calls TALITY will process: **Outgoing Calls Only**, **Incoming Calls Only** or **Both**.

MINIMUM CALL LENGTH - TALITY will store only calls that are longer than

specified time.

CUSTOM PRICING INCREMENTS – If **Default Pricing** is used to price the calls this feature specifies in how many seconds per increment TALITY will price calls. This option does not apply to V&H pricing table if you are using one. Click on **First Minute** and enter a number of seconds, click on **Next Minute** and enter a number of seconds for each additional minute.

ADDITIONAL PARAMETERS

YOUR TELEPHONE NUMBER - Enter your company's main telephone number. (DO NOT USE 800 NUMBERS).

PRICE CALLS EVERY - This field defines the time interval for automatic pricing updates. The time interval refers to a time during which **NO KEYS WERE PRESSED ON THE KEYBOARD AND THERE WAS NO MOUSE ACTIVITY**. For example, if you define this field as 15, then every 15 minutes the system will process calls that came in since the last update (providing, the keyboard wasn't touched). While the processing takes place, a window will pop up with the message "PROCESSING CALLS...PLEASE DO NOT TOUCH THE KEYBOARD OR THE MOUSE".

Note: In the event that any of TALITY "pull down" menus are displayed, (i.e. Controls or Administration) automatic call updates will not work. Only the Main Screen can be displayed.

DEFAULT CREDIT LIMIT - This field defines the default guest credit limit amount for all guests. This amount is displayed in the Users screen, and it can be changed if desired. If any guest exceeds the credit limit defined in this field, TALITY will notify you.

FULL ACCESS PASSWORD - Type up to 6 characters for a password. It will make all features of TALITY available to the user of this password.

SECOND LEVEL PASSWORD – Type up to 6 characters for a second level password.

THIRD LEVEL PASSWORD - Type up to 6 characters for a password that would not let user change Controls and Pricing in TALITY.

REPORT PAGE LENGTH - Indicate how many lines you would like to have per report page.

SAVE ARCHIVED CALLS FOR () MONTHS – after you run a billing report the old call records can be saved in an archive database as a result of running Archive utility or setting the automatic Archive/Optimize option. This field specifies how long would you like to keep them there. While in archive database the records are available for reporting. If you do not want to save call records at all enter 0 for months and records will be marked for deletion. TALITY will actually delete them after you run Optimize (Controls/Optimize).

AUTO ARCHIVE/OPTIMIZE – set this option if you would like the call records be archived and optimized periodically.
In our example the calls will be archived and optimized automatically every week (Run: Weekly), on Monday (Day: Mon), at 2 AM (hh:mm: 02:00).

PRICE OPERATOR CALLS – price the 0+ calls according to the set rates.

SURCHARGE OPERATOR CALLS – if checked the surcharges are applied to the 0+ calls.

DISABLE V&H PRICING (only if V&H pricing files are installed).

DISABLE CREDIT LIMIT CHECKING

SEPARATE V&H AND LONG DISTANCE AND INTERNATIONAL RATES

REMOVE USER AFTER BILLING (DEFAULT) – if checked TALITY deletes Users name after he has been billed. This is a default value.

DO NOT PRINT ZERO COST CALLS ON BILL – if checked no cost calls (for example: 800 calls or some of the local ones) do not appear on bills.

STILL PRINT BILL WHEN GUEST/USER OWES RECURRING CHARGE ONLY

REMOVE GUEST/USER AFTER BILLING (DEFAULT)

SHOW AUTHORIZATION CODES ON REPORTS will suppress your organization's authorization codes on reports if you enter N for No. To display the authorization codes on your reports, enter Y for Yes.

TAX and DESCRIPTION - TALITY can apply up to three different taxes to the telephone call's cost. You may also change descriptions that would show on the billing report.

REPORT HEADER - use this field to enter the name and address of your property that would print on guests' bills as well as reports.

REPORT FOOTER will show on the bottom of your billing reports.

3. To save changes click on **OK**.

PMS parameters

1. Open **Controls** menu.
2. Click on **Property Management System**. Property Management System screen appears.

Property Management System

System: HOBIC Format (Protocol III) Format

Port: Com1 File Name: Select File

Baud: 9600 Transmit Admin extensions to Property Management System

Parity: None Location Identifier:

Data Bits: 8 Do Not Print

Stop Bits: 1 Print All Posted and Unposted Records

Print Unposted Records Only

Flow Control

No Flow Control

ACK/NAK

XON/XOFF

ENG

Transmit ENG (05h) before each call record

Maximum attempts to transmit ENG (05h): 3

Checksum

None

BCC/LRC (Block Control/Longitudinal Redundancy Check)

CRC (Cyclic Redundancy Check)

Maximum attempts to transmit call record 3

Maximum time to wait for ACK/NAK (Secs) 1

Maximum delay between call records (Secs) .. 1

OK Cancel

3. Click on the down arrow of the **System** box to invoke the list of the available systems.
4. Choose the **Property Management System** that the property has installed and click on it. If your **Property Management System** is not on the list refer to the **Controls** section of this manual.
5. Now that an appropriate name for your system's record format is displayed proceed with setting up your **Property Management System**. Pull down the **Port** listing. Select available COM Port or choose **File**. If you selected **File** option the **Select File** button and the **File Name** text box become active. You can enter the Path and the File name that your Property Management System can work with into the text box or you can browse for it by clicking on **Select File** button.
6. Enter communication parameters **Baud rate**, **Parity**, **Data Bits** and **Stop Bits**.
7. **Transmit Admin extensions to Property Management System** – check this box if you want to process call records for extensions assigned to employees.
8. Enter the 3-character value identifying the installed location in **Location Identifier** field.

9. Select Print option:
Do Not Print - PMS data will not be sent to the printer at all (default setting).
Print All Posted and Unposted Records – PMS data will be sent to the PMS and the printer at the same time.
Print Unposted Records Only - PMS data will be sent to the printer in the event that the PMS link is broken or PMS is unavailable.
10. Depending on your Property Management System's requirements check one of the 3 option buttons in the **Flow Control** option group.
No Flow Control – the Tality sends a record to PMS and does not require any acknowledgement.
ACK/NAK – sending of a call record to PMS has to be acknowledged by Tality software. This is a default value.
XON/XOFF – sending of a call record to PMS has to be acknowledged by hardware.
11. **ENQ** check box enables you to transmit the inquiry to the PMS system before the record is sent to verify if the system is ready to receive data. This option is only available with **ACK/NAK** type of flow control.
12. **BCC Transmit Block Control Character after each call record**
13. **Maximum attempts to transmit call record....**- how many times Tality will attempt to send out the same call record. Available only for the **ACK/NAK** flow control.
14. **Maximum time to wait for ACK/NAK (Secs)....** - how long Tality will wait for an acknowledgment of record receipt from PMS. In case an acknowledging signal is not received on time the record is regarded as not sent and Tality will attempt to send it out again. That is the reason you should consider the take care when setting this option and refer to the PMS documentation if necessary.
This option is available for the **ACK/NAK** flow control only.
15. **Maximum delay between call records (Secs)....** - time interval TALITY will be waiting before sending next record. This option is available for all sorts of flow control.
16. If you would like to save the settings click on **OK** or otherwise click on **Cancel**.

Telephone Filter

1. Click on the **Controls** menu option.
2. Select **Telephone Filter** and click on it. The **Telephone Filter** screen appears.

Dialed Pattern	Price	Dialed Pattern	Price
1010888TTTTTTTTTTT	<input checked="" type="checkbox"/>	TTTTTTTTT	<input checked="" type="checkbox"/>
TTTTTTTTT	<input checked="" type="checkbox"/>	TTTTTTT	<input checked="" type="checkbox"/>
TTT	<input checked="" type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>

T: Represents one digit of the actual telephone number (0-9).
0-9,*,#: One-to-one correspondence is required.
N: Represents any one of: 0-9,*,#.
X: ignore all characters from this position.

OK Cancel

The **Telephone Filter** is comprised of two functions. One function provides a method of defining whether or not certain types of calls, based on the dialing pattern, are to be priced. For example, if you define a local call-dialing pattern with **Price** field left empty, no costing information will apply to those calls. If you define another type of call with **Price** field checked, those calls will be priced accordingly.

The second function of the **Telephone Filter** enables you to separate the actual telephone number from the rest of the characters that have been keyed in through a telephone keypad or output by your telephone system. It will read the SMDR input data and strip off the numbers not related to actual telephone number digits.

After TALITY has been installed and some calls have come in, use the **Phone Activity by Date** report to check for calls that have not been recognized by the program. You can then determine if you should make changes to the **Telephone Filter** screen.

Dialed Pattern is a special sequence of the characters that define the telephone number in the SMDR output. Some examples include calls made through MCI or SPRINT, calls made using a prefix, and calls made to beepers.

The following characters are used to define the dialing patterns to the Telephone Filter function:

"T" - Represents one digit of a telephone number, any digit between 0 and 9.

"0 - 9, *, #" - Any of these specific characters in the dialing pattern that correspond to the actual character that was dialed.

"N" - One character of the dialed character string (0 - 9, *, #) that is not part of the actual telephone number.

"X" - Ignore all characters from this point on (**can be used only after the longest dialing pattern**).

The following are examples of dialing patterns:

DIALED COMBINATION	PATTERN
9-547-7676 (Local outside call)	9TTTTTTT
589-1212	TTTTTTT
9-1-203-589-1212	9TTTTTTTTTTTT
9-0-203-589-1212	9TTTTTTTTTTTT
1-203-589-1212	TTTTTTTTTTTT
0-203-589-1212	TTTTTTTTTTTT
203-589-1212	TTTTTTTTTT
1-865-4156 (Intralata)	TTTTTTTTT
0-865-4156	TTTTTTTTT
10244-1-677-3100	10NNNTTTTTTTTT
10244-0-677-3100	10NNNTTTTTTTTT
10288-1-203-589-1212	10NNNTTTTTTTTTTTTT
10288-0-203-589-1212	10NNNTTTTTTTTTTTTT
4994-1-212-655-0909	4994TTTTTTTTTTTT

(To access a specific long distance trunk, e.g., AT&T or MCI Sprint)

01-49-81552203
(International operator)

**DO NOT CREATE ANY
PATTERN**

5. **NPA976** – prices all the calls with exchange 976 for any area code
201 – prices all the calls with an area code 201 for any exchange
NPANXX – default price for all the calls.
L – local calls. Pertains to all the numbers marked local (Y in **Local** field) on Destination File screen. It overwrites V&H prices if the V&H file is loaded.
LD – long distance – any numbers not marked as local (no Y in **Local** field) on Destination File screen. It overwrites V&H prices if the V&H file is loaded.
6. Type time in the first **From** field (this would be a start time of the first time period).
7. Type rate for the first minute in the **Rate Per Minute/First** field.
8. Type rate for each additional minute in the **Rate Per Minute/Next** field.
9. Enter time and rates for the next time period only if they are different. Otherwise, TALITY will assume that calls are priced at the same rate all day long.
10. Click on **New** to create another record or **OK** to leave a screen and save the changes. If you do not wish to save any changes click on **Cancel**.

Surcharge

Surcharges are typically used to generate additional revenue for the establishment. **Surcharge** defines how calls are priced by using a combination of surcharges and multipliers.

1. Click on the **Pricing** menu.
2. Click on **Surcharge**.

Surcharge screen appears.

	Grace (MM:SS)	Surcharge Per Call	Surcharge Per Min	Multiplier
Operator:	00 : 30	0.50	0.50	0%
Long Distance:	00 : 30	2.00	0.50	20%
International:	00 : 50	3.00	0.50	35%
Local:	00 : 00	0.50	0.00	0%
411 Calls:	00 : 00	0.75	0.00	0%
NPA-555 Calls:	00 : 00	0.50	0.00	0%
800/888-NXX Calls:	00 : 00	0.00	0.00	0%
700-NXX Calls:	00 : 00	0.30	0.00	0%
NPA-976 Calls:	00 : 30	2.00	0.00	0%
900-NXX Calls:	00 : 00	5.00	1.00	0%
877-NXX Calls:	00 : 00	0.00	0.00	0%
- Calls:	00 : 00	0.00	0.00	0%

OK Cancel

3. In the appropriate cells enter the surcharge values for guests' calls.
4. Click on **OK** to save changes.

In our example the surcharges are as follows:

- Operator Calls (all 0+ calls) have 30 seconds Grace Period (all calls that are 30 seconds or shorter will be ignored, however, call that lasted for 31 seconds will be processed as a 31 seconds call). You can include this type of calls in Custom Pricing and enter the pricing information for them there. Following our example each operator-assisted call will be priced as follows:
the actual cost from the Custom Pricing (if any) **plus** 50 cents per call **plus** 50 cents for each minute.
- Long Distance Calls have 30 seconds Grace Period and they will be priced as follows:

the long distance rate (taken either from V&H pricing files or from the Custom Pricing) **plus** 2 dollars per call **plus** 50 cents for each **multiplied by** 20%.

- International Calls' grace period is 50 seconds and they will be priced as follows: the long distance rate (taken either from V&H pricing files or from the Custom Pricing) **plus** 3 dollars per call **plus** 50 cents for each minute **multiplied by** 35%.
 - For all the calls below you can set the rate in Custom Pricing. The price information from the Surcharge screen will be added on top of the Custom Pricing charges.
 - Local Calls have no grace period and they will be priced as follows:
50 cents per call
 - 411 Calls have no grace period and they will be priced as follows:
75 cents per call
 - NPA-555 Calls have no grace period and they will be priced as follows:
50 cents per call
 - 800/888-NXX Calls have no grace period. They are going to be cost according to the Custom Pricing price settings. Following our example there is no applicable surcharge.
 - 700-NXX Calls have no grace period and are priced 30 cents per call.
 - NPA-976 Calls have 30 seconds grace period and they will be priced
2 dollars per call.
 - 900 Calls have no grace period and they will be priced as follows:
5 dollars per call plus 1 dollar for each minute.
 - The empty text-boxes provide you with an option of entering surcharges for the area codes and exchanges not listed on Surcharge screen.
For example you can include the 877-NXX calls. In our example they do not have any applicable surcharge
5. Press **OK** to save your work and leave the screen.

Editing surcharges

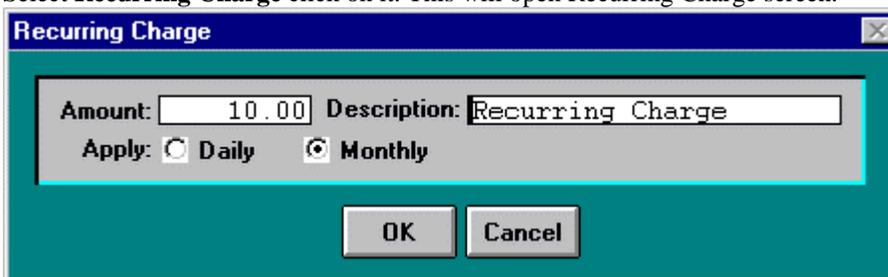
1. Open **Pricing** menu. Click on **Surcharge**.
2. Overwrite existing values with new ones and press **OK** to save changes.

Recurring Charge

Recurring Charge is a dollar amount that would be applied as a fixed charge to the use of the phone equipment, access to multiple telephone lines, etc. It can be calculated as applied, daily or monthly.

1. Click on **Pricing** item on the TALITY main menu

2. Select **Recurring Charge** click on it. This will open Recurring Charge screen.



The above example shows the Recurring Charge of \$10.00. It will be added to your guest/tenant bill on monthly basis.

Note: If you want to charge the Recurring Charge you have to check **Recurring Charge** box on the Users screen for the particular user. Otherwise Recurring Charge will not be added to the billing report.

3. Enter the value of recurring charge in **Amount** text box.
4. Check one of the **Apply** option buttons depending if you want to apply charges daily or monthly.
5. Click on **OK** when finished.

Import V&H Pricing Data

If you purchased V&H Pricing Files this utility enables you to import them.

The V&H Pricing files have to be saved in the TALITY directory for this utility to work.

1. Click on **Pricing** on the Main Menu.
2. Click on **Import V&H Pricing Data**.
The message "This process will load V&H Pricing data" appears.
3. Click on **OK** if you want to proceed, **Cancel** if you want to abort.
4. The message "This process will overwrite current pricing information" may appear.
Click on **OK** if you want to overwrite current pricing information.

If message "V&H PRICING FILES NOT FOUND IN THE TALITY DIRECTORY" appears, make sure that the updated file are in \TALITY directory and that you have entered correct telephone number (i.e. 201-593-1212 if your pricing files are 201 593 area and exchange code) on System Parameters Screen.

Trunks

Trunks screen enables you to edit, to delete or to add new trunk.

Open **Pricing**. Click on **Trunks**. **Trunks** screen appears.

Depending on if you are editing or entering new record the screen mode indicator changes from **Edit** to **New**

The screenshot shows a dialog box titled "Trunks" with a close button in the top right corner. Below the title bar is a button labeled "Edit". The main area contains two text boxes: "Trunk:" with the value "0110" and "Carrier:" with a dropdown menu showing "ATT DIRECT DIAL RATES". Below these are five buttons: "New", "Edit", "Delete", "OK", and "Cancel". Two arrows point from the text below to the "Trunk:" and "Carrier:" text boxes.

Trunk number

Carrier description

1. Click on **New** button.
Enter trunk number in the **Trunk** text box.
2. Click on a down arrow of the **Carrier** text box to invoke a list of carriers. Choose the appropriate carrier.
3. Click on **OK** to save the changes. The message "Information Saved" will appear in the left corner of your main screen.

Guest/User

Enter all the extensions and rooms (you can do it in the format “Room *extension number*”) you bill for.

1. Click on the **Guest/User** menu option
2. Click on **Add Guest/User**.
The **Add Guest/User** screen appears. By default the **Add Guest/User** screen is set for new **Guest/User** entry.

The screenshot shows the "Add Guest / User" dialog box. It is divided into several sections. The top section is for name entry, with fields for "Last" (containing "Room 214"), "First", and "MI" (checkbox). Below this is the "Room" field (containing "214") and "Extensions" (containing "214" and two empty boxes). There is also an "Authorization Code" field and a checkbox for "Always Store With Call". The next section allows selecting between "Guest" (selected) and "User". The "Guest" section includes "Date" (12/18/2003) and "Time" (13:34). The "User" section includes a "Department" dropdown and an "Edit Departments" button. Below this is a section for "Recurring Charge" with a checkbox "Apply Recurring Charge", "Amount" (0.00), "Description" field, and "Apply" radio buttons for "Daily" (selected) and "Monthly". The final section includes a checked "Surcharge" checkbox, "Credit Limit" (50.00), "Current Charges" (0.00), and "Last Bill" (//). At the bottom are "OK" and "Cancel" buttons.

3. Type the following information in the corresponding text boxes:
Last Name, First Name, Middle Initial, Room number, up to six different extensions for the new user and the **Authorization Code** if there is any.
Note: Authorization Code overwrites the room number and extensions. It is recommended to set authorization codes for all guests and employees.
4. If user is a guest check the **Guest** option button and fill in the time and the date of registration. If user is an employee, click on the **Admin.** option button and type in

the **Department ID** (must be previously defined).

In order to view the list of valid **Department IDs** click on a down arrow of the **Department** text box. You can choose the desired **Department** by clicking on it.

5. You can edit existing **Department's ID** by clicking on the **Edit Departments** command button (see "To edit User" following this section).
6. If there are any **Surcharges** or **Recurring Charges** associated with the calls for this user check the adequate check boxes at the bottom of the screen. In case there is a defined credit limit specify it in the **Credit Limit** text box.
7. Click on **OK** to save changes

SMDR MONITOR

Overview

SMDR Monitor is a communication program that collects SMDR information generated by the PBX. It can also display the SMDR information on the screen of your computer in real time in the raw format.

SMDR Monitor command line is added to the Microsoft Windows WIN.INI file **Load** statement, so every time Microsoft Windows is started **SMDR Monitor** is loaded minimized and is ready to collect call records data.

SMDR Monitor must be running in order for TALITY to collect call activity information.

To view SMDR data in real time double-click on **SMDR Monitor** minimized icon. **SMDR Monitor** screen is displayed



Action



Connect - will allow you to connect to a specified serial port (see Settings)

Disconnect - will allow you to disconnect from a specified serial port

Flush - will dump any SMDR data that may be currently in SMDR Monitor buffer

Print - will print a content of current screen

Exit - will exit program. TALITY will stop collecting data

SMDR Monitor32 Settings

Monitor COM Port Options:

Port: COM1

Baud Rate: 1200

Data Bits: 7

Parity: Even

Stop Bits: 1

Flow Ctrl: DTR/DSR
 RTS/CTS
 XON/XOFF

COM Buffer Size: 80

Display Options:

Autowrap
 Add Line Feed

Control Options:

Write Log File TELMSG.DAT
 Display Errors
 Always on Top

OK
Cancel

Settings...

Com Port Options

Port - Click on the down arrow icon in the **Port** field to select a port on the computer the SMDR cable is connected to.

Baud Rate - Click on the down arrow icon in the **Baud Rate** field to select a transmission speed the phone system is set at.

Data Bits - Click on the down arrow icon in the **Data Bits** field to select a data bits setting of the phone system.

Parity - Click on the down arrow icon in the **Parity** field to select a parity setting of the phone system.

Stop Bits - Click on the down arrow icon in the **Stop Bits** field to select a stop bits setting of the phone system.

Flow Ctrl. - Check an appropriate box to select a flow control parameter that may be required by the **PBX** (refer to PBX's documentation).

Com Buffer Size - a number of characters SMDR Monitor will hold in the memory buffer before saving data to the hard disk of the computer (recommended setting is 80).

Control Options

Write Log File TELMSG.DAT - check this box if you wish TALITY to save raw SMDR information in the separate file (TELMSG.DAT in directory where TALITY files reside)

Display Errors - Check this box if you wish TALITY to display communication errors in the SMDR Monitor window

Always on top - check this if you wish SMDR Monitor icon or window to be always on the foreground of the desktop

Display Options

Autowrap - some PBX SMDR string is longer than can fit on the screen, check this option to force the string to wrap to the next string when the right edge of the SMDR Monitor window is reached.

Add Line Feed - Check this box if you wish to have a blank line inserted between SMDR call records (it may improve readability of SMDR records displayed on the SMDR Monitor).

PBX



PBX Format - Click on it if you would like to select a PBX Format.

Load Telmsg.dat - Click on it if you would like to load data from Telmsg.dat file. Loading Telmsg.dat may result in duplicate records in your TALITY database. You have to disconnect (Action/Disconnect) from the COM port before attempting loading.

Guest/User

Overview

There are two possible tenant categories: Guests and Users (employees). TALITY creates a record for a newly checked in tenant automatically as soon as the phone activity starts for the room assigned to this individual. The program assumes the tenant is a Guest and assigns him a name composed in the following manner - "Room extension number"(for example "Room 214"). Guests' call records are monitored from that time on and he is billed according to the set rates. TALITY also allows you to change the Guest's default name or apply different settings that would affect billing as well as add the employees' records in order to monitor their phone activity. You can do it manually throughout the Guest/User screen described below. The Guest/User screen is designed for entering and maintenance of Guests' and Employees' records with their departments.

Adding a New Guest/User

1. Click on **Guest/User** on the main menu.
2. Click on **Add Guest/User**. The **Add Guest/User** screen displays.

Add Guest / User

Name: Last: Room 214 First: MI:

Room: 214 Extensions: 214

Authorization Code: Always Store With Call

Guest From: 12/18/2003 @ 13:34

User Department:

— Recurring Charge —

Apply Recurring Charge

Amount: 0.00 Description:

Apply: Daily Monthly

Surcharge Credit Limit: 50.00

Current Charges: 0.00 Last Bill: //

3. Type the following information in the corresponding text boxes: **Last Name**, **First Name**, **Middle Initial**, **Room number**, up to six different extensions for the new user and the **Authorization Code** if there is any.
Note: Authorization Code overwrites the room number and extensions. It is recommended to set authorization codes for all guests and employees.
4. If the customer is a guest, check the **Guest** option button and fill in the time and date of registration. On the other hand if the customer is an employee, click on the **User** option button and type in the **Department ID** (must be previously defined). In order to view the list of valid department IDs, click on a down arrow of the **Department** text box. You can choose the desired department by clicking on it.

5. You can edit existing department's ID by clicking on the **Edit Departments** command button (see "To edit User" following this section).
6. If there are any **Surcharges** or **Recurring Charges** associated with the calls for this user check the adequate check boxes at the bottom of the screen. In case there is a defined credit limit specify it in a **Credit Limit** text box.
7. Click on **OK** to save changes.

Changing Guest/User Information

1. Click on **Guest/User** on the main menu.
2. Click on **Change Guest/User** Information. A list of guests/users appears on the screen.
3. You can set the list to view only guest, only employees (users.), or both by checking appropriate **Show:** check boxes on the bottom of the screen. The list can also be sorted and the sort options are implemented in the command buttons on the top of the listing. Choose the desired guest/user name by highlighting it and clicking on **OK**, and proceed with the changes.

Change Guest / User Information

MI
 Name: Last: Room 214 First: []

Room: 214 Extensions: 214 [] []
 [] [] []

Authorization Code: [] Always Store With Call

Guest From: 12/18/2003 @ 13:34

User Department: []

Apply Recurring Charge
 Amount: 0.00 Description: []
 Apply: Daily Monthly

Surcharge Credit Limit: 50.00
 Current Charges: 0.00 Last Bill: / /

4. If any of the departments need to be edited or a new department has to be added you can accomplish it by clicking on the **Edit Department** command button on the **Guest/User** screen. The **Edit Department** command button can be made available by clicking on the **User** option button. **Departments** screen is displayed.
5. Click on **OK** to save changes.

Deleting Guest/User

1. Click on **Guest/User** on the main menu.
2. Click on **Delete Guest/User**. A list of guests/users appears on the screen.
3. You can set the list to view only guest, only employees (users.), or both by checking appropriate **Show**: check boxes on the bottom of the screen. The list can also be sorted and the sort options are implemented in the command buttons on the top of the

listing. Choose the desired guest/user name by highlighting it and clicking on **OK**.

Delete

Last First MI
Name: Room 214
Room: 214 Extensions: 214
Authorization Code:

Guest From: 12/01/1999 @ 11:08
 User Department: Edit Departments

Surcharge Recurring Charge Credit Limit: 50.00
Current Charges: 0.00 Last Bill: //

STOP
Delete? OK Cancel

4. Once the guest/user appears on the screen you will be prompted to confirm the deletion. If yes click on **OK**. TALITY will proceed with a **Guest/User** deletion.

Print Bill for Guest/User

1. Click on **Guest/User** on the main menu.
2. Click on **Print Bill** for **Guest/User**. A list of guests/users appears on the screen.
3. You can set the list to view only guest, only employees (users.), or both by checking appropriate **Show**: check boxes on the bottom of the screen. The list can also be sorted and the sort options are implemented in the command buttons on the top of the listing. Choose the desired guest/user name by highlighting it and clicking on **OK**.

- Once the guest/user appears on the screen you will be prompted to enter the billing criteria

Print Bill for:

Last First MI
Name: Room 214

Room: 214 Extensions: 214

Authorization Code:

Guest From: 12/01/1999 @ 11:08

User Department:

Edit Departments

Surcharge Recurring Charge Credit Limit: 50.00

Current Charges: 0.00 Last Bill: / /

Select Calls: All Unbilled From: / / At: : To: / / At: :

Remove guest/user after billing

OK Cancel

- Select the billing period by clicking on the down arrow of the **Select Date** text box.
- Check the **Remove** guest/user after billing check box, in case you would like to delete the tenant after billing. Click on **OK**. The message “Processing billing” will pop on the screen. If there are no records for this user the program will inform you with the message. Otherwise, the billing report will be printed and the call records will be archived. This data will not be available for billing, but you will be able to print reports based on it.

Reports

Overview

The reports can be created in the following output formats:

Screen - You can view the entire report on-line by paging through it. Also, you can use the Print button to print selected pages.

Printer – Depending on the **Printer Setup** settings it provides you with a hard copy of the report, or it directs your output to a file.

THE FOLLOWING REPORTS ARE AVAILABLE

Credit Limit Alert

This report is created when a User exceeds the telephone credit limit. The system checks the User's telephone activity all the time. If the guest has exceeded the credit limit (defined either at check-in time in the Users screen or the default defined in the System Parameters screen), a prompt to run this report will pop up.

Profit

This report provides management with profit information. By specifying up to 3 different Tax deductions (part of the System Parameters screen), TALITY calculates the profit.

User Activity

The User Activity report gives you the information regarding Users current phone charges. It prints each Users name and all of his or her phone calls and their charges (Actual Cost and User Charges).

Phone Activity by Authorization Code

This report lists detailed call activity in Authorization Code Sequence.

Note: Authorization Codes are not used everywhere. If your facility is not using these codes, this report will not be available.

Area Code Activity

The Phone Activity by the Area Code report summarizes all calls by area code, providing statistical data for length and cost.

Extension Activity

The Extension Activity report lists each call made by extension.

Phone Activity by Date

This report lists all calls made in date and time sequence for the dates selected. This is like a "laundry list."

Department Activity

The Department Activity report lists the call activity for each extension within a department.

Phone Activity by Telephone Number

This report lists summary information for all calls in telephone number sequence, providing statistical data for length and cost.

Trunk Activity

The Trunk Activity report lists the call activity for each extension within a trunk.

20 Longest Calls

This report lists the twenty longest calls in descending sequence for the period selected.

20 Most Active Extensions

This report summarizes the call activity for the twenty most active extensions, providing statistical data for length and cost.

20 Most Frequently Called Phone Numbers

This report summarizes the call activity for the twenty most frequently called telephone numbers, providing statistical data for length and cost.

20 Most Expensive Calls

This report provides detailed information about the twenty most expensive calls.

Generating Reports

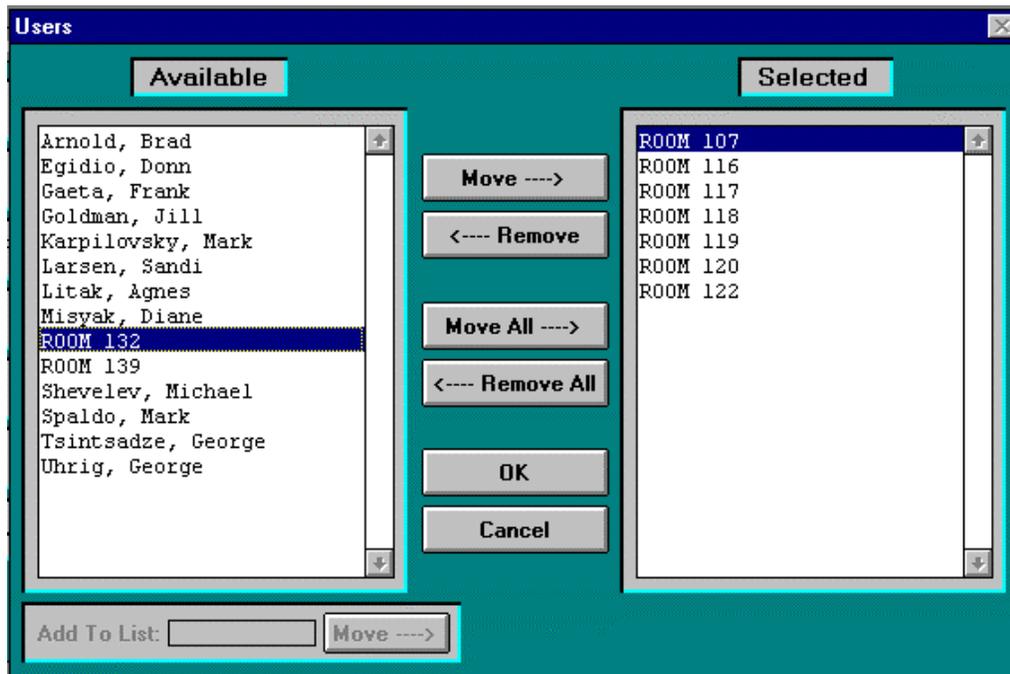
1. Click on the **Report** menu.
2. Choose the name of the report you want to run. Click on it.
The screen for the required report appears.

The screenshot shows a dialog box titled "Guest / User Activity" with a close button in the top right corner. The dialog is divided into several sections for configuring a report. At the top, there are two dropdown menus: "Report Output" set to "Screen" and "Report Type" set to "Summary", followed by a "Page Break" checkbox which is unchecked. Below this is a "Select Calls" dropdown set to "All", and two date-time fields: "From:" and "To:", each with a date and time selector. The next section contains a "Phone:" field with a search icon and a range selector. This is followed by "User:", "Dept:", "Ext:", "Room:", and "Trunk:" fields, each with a search icon and a range selector. The "Ext:", "Room:", and "Trunk:" fields are grouped together. Below these is an "Authorization Codes:" field with a search icon and a range selector, and a "Direction:" dropdown set to "Both". At the bottom of the dialog are four buttons: "Predefined", "Clear", "OK", and "Cancel".

3. If you have a filter that you would like to use click on the **Predefined** button select the filter and either double click on it or click on **OK**.
Notice the changes on your screen. Check if all the criteria are correct and click on **OK**.
Depending on the settings in the **Report Output** field a report will be either printed or it will show up on a screen.

In case you do not have a predefined filter you will have to enter criteria manually (follow instructions below).

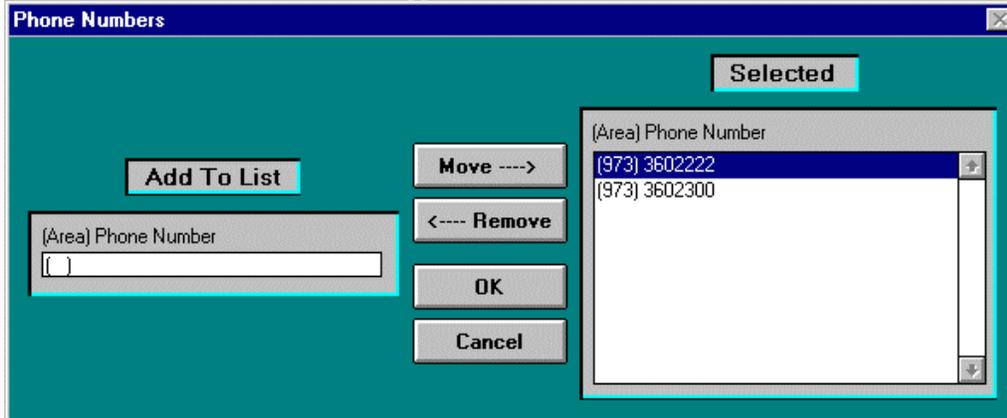
4. Fill in settings for **Report Output**, **Report Type** and **Page Break** by pulling down the lists of items and making the appropriate selections.
 - **Report Output** – where would you like to direct the output to **Printer** or **Screen** (not available for some reports).
 - **Report Type** – would you like to run **Detailed** report or **Summary** (not available for some reports).
 - **Page Break** – would you like to have page breaks in your reports (not available for some reports).
5. Pull down the **Select Calls** list by clicking on the down arrow and choose the appropriate period for your report. If you would like to enter the dates yourself select **Date Range** from the listing. This will activate **Dates** fields and enable you to make an entry.
6. By clicking on the command buttons corresponding to either **Department** or **User** you can invoke the **Department** or **User** listings respectively. The same applies to **Ext.**, **Room**, **Trunk** and **Authorization Codes**.



7. Both of the listings work in the same manner. They consist of two scroll windows. One with **Available** items the other with **Selected** items. You can move items from one window to the other by clicking on the command buttons placed between them. These are the buttons: **Move ->/Remove ->** - used to move/remove items one by one, **Move All->/Remove All ->** used to move/remove all items at the same time. You can also move items between windows by double clicking on a given name. When you place all the

Users or **Departments**, required for the report, in **Selected** window click on **OK** to proceed. You will return to the report screen. Note that there are new entries in the **User** and the **Dept** text boxes that reflect your selection.

- In case you would like to filter your report on the phone number field click on the **Phone** button. The **Phone Numbers** screen appears.



- Add the phone numbers to the **Selected** list by entering them in **Add To List** field and using **Move** button. In order to remove the phone number from the **Selected** list, highlight the particular number and click on **Remove**.
- Select the direction of calls you want to include in the report by choosing appropriate item from the **Direction** pull down list.
- Once you have entered report criteria you can save them as a filter for future usage by clicking on **Predefined** button at the bottom of the screen. The **Predefined** screen comes up.
To save the selection you are working with – click on **Save** and enter the name for it. Once you have set up a filter it becomes available for future reports.
To delete the predefined selection – highlight the name of the filter and click on **Delete**. TALITY will ask you to confirm the deletion.
- When all the settings are correct click on the **OK** button to run the report. If there is no records found for the specified criteria you will be prompt with the message **No Matching Records Found**. Otherwise TALITY will proceed with generating of the report. Following our screens example the below is the report that would be generated. Clicking on **Print** button will direct the output to the printer.

Tality For Windows v2.14 - Serial No. CSL7L-9801-001

Guest / User Reports Pricing Controls Help Exit Text

12/02/99 10:45 Page: 1

Guest/User Activity Summary

12/01/99 - 12/01/99

User	Total In Calls	In Coming	Total Length HH:MM:SS	Actual Cost	User Charges
Arnold, Brad	186	42	06:04:46	69.30	69.30
Egidio, Donn	125	47	07:04:17	68.87	68.87
Gaeta, Frank	123	28	06:14:32	105.89	105.89
Goldman, Jill	34	3	01:18:30	23.86	23.86
Larsen, Sandi	33	26	02:45:13	5.24	5.24
Litak, Agnes	90	29	02:52:17	15.07	15.07
Misyak, Diane	106	59	03:02:22	23.65	23.65
Spaldo, Mark	89	61	07:50:39	13.35	13.35
Tsintsadze, George	18	3	00:35:17	2.01	2.01
Uhrig, George	71	48	04:45:41	19.51	19.51
Grand Total:	875	346	42:33:34	346.75	346.75

Print OK

Pricing

Overview

The difference between guests and administration is very important. Normally, when guest's telephone activity is priced a surcharge and/or multiplier is added to the actual cost of calls.

There are a number of components involved in pricing telephone calls. These components are described in detail in this section.

Custom Pricing

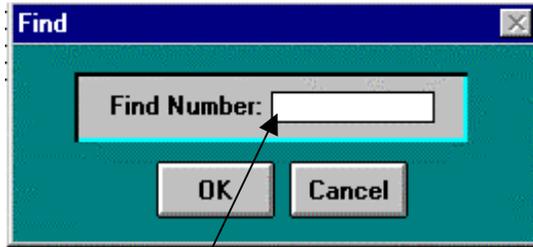
Custom Pricing screen will allow you to enter pricing information to apply cost to the outgoing calls. If you do not have V&H pricing file you will have to price all calls here. In case you purchased V&H pricing file you can overwrite its price settings by entering new prices in Custom Pricing screen, and set the prices for the calls which are not included in your V&H file i.e. operator assisted calls, 800 calls.

1. Click on the **Pricing** and select **Custom Pricing** from the pull down menu.
Click on it

2. When you are done click on the **OK** button to save the changes and leave the screen.

Finding a specific record in the Number Dialed field

1. Click anywhere on **Number Dialed** field.
2. Click on the **Find** button.



Enter here a value to look for

Surcharge

Surcharges are typically used to generate additional revenue for the establishment. A Surcharge defines how calls from the extension(s) assigned to it are priced by using a combination of surcharges and multipliers.

TALITY can differentiate the following types of calls: Operator Assisted, Long Distance, International, Local, 411, NPA-555, 800/888-NXX, 700-NXX, NPA-976 and 900-NXX.

Surcharges and/or multipliers are added to the rates present in Rate Tables for Operator Assisted, Long Distance and International calls. Price of these calls would equal to the following formula:

Long Distance Rate + Per Call Surcharge + Per Minute Surcharge x Multiplier

Surcharges and/or multipliers are **NOT** added to the rates present in Rate Tables for Local, 411, NPA-555, 800, NPA-976 and 900 calls. Price of these calls would equal to the following formula:

Per Call Surcharge + Per Minute Surcharge x Multiplier

Surcharge Screen includes also a **Grace Period** option for all types of calls, which is the minimum duration of the call that a charge would be applied to. For example 00:30 sec. grace period specified for Long Distance calls would not allow to apply any cost to long distance calls that are 30 seconds or shorter.

Adding a new surcharge record

1. Click on the **Pricing** menu option and open **Surcharge**.
The **Surcharge** screen appears.

	Grace (MM:SS)	Per Call	Per Min	Multiplier
Operator:	00 : 30	0.50	0.50	0%
Long Distance:	00 : 30	2.00	0.50	20%
International:	00 : 50	3.00	0.50	35%
Local:	00 : 00	0.50	0.00	0%
411 Calls:	00 : 00	0.75	0.00	0%
NPA-555 Calls:	00 : 00	0.50	0.00	0%
800/888-NXX Calls:	00 : 00	0.00	0.00	0%
700-NXX Calls:	00 : 00	0.30	0.00	0%
NPA-976 Calls:	00 : 30	2.00	0.00	0%
900-NXX Calls:	00 : 00	5.00	1.00	0%
877-NXX Calls:	00 : 00	0.00	0.00	0%
- Calls:	00 : 00	0.00	0.00	0%

OK Cancel

2. In the appropriate cells enter values on how you would like to surcharge your guests' calls.
3. Click on **OK** to save changes.

In our example the surcharges are as follows:

- Operator Calls (all 0+ calls) have 30 seconds Grace Period (all calls that are 30 seconds or shorter will be ignored, however, call that lasted for 31 seconds will be processed as a 31 seconds call). You can include this type of calls in Custom Pricing and enter the pricing information for them there. Following our example each operator-assisted call will be priced as follows:
the actual cost from the Custom Pricing (if any) plus 50 cents per call plus 50 cents for each minute.
- Long Distance Calls have 30 seconds Grace Period and they will be priced as follows:
the long distance rate (taken either from V&H pricing files or from the Custom Pricing) plus 2 dollars per call plus 50 cents for each multiplied by 20%.
- International Calls' grace period is 50 seconds and they will be priced as follows:
the long distance rate (taken either from V&H pricing files or from the Custom Pricing) plus 3 dollars per call plus 50 cents for each minute multiplied by 35%.
- For all the calls below you can set the rate in Custom Pricing. The price information from the Surcharge screen will be added on top of the Custom Pricing charges.

- Local Calls have no grace period and they will be priced as follows:
50 cents per call
 - 411 Calls have no grace period and they will be priced as follows:
75 cents per call
 - NPA-555 Calls have no grace period and they will be priced as follows:
50 cents per call
 - 800/888-NXX Calls have no grace period. They are going to be cost according to the Custom Pricing price settings. Following our example there is no applicable surcharge.
 - 700-NXX Calls have no grace period and are priced 30 cents per call.
 - NPA-976 Calls have 30 seconds grace period and they will be priced 2 dollars per call.
 - 900 Calls have no grace period and they will be priced as follows:
5 dollars per call plus 1 dollar for each minute.
 - The empty text-boxes provide you with an option of entering surcharges for the area codes and exchanges not listed on Surcharge screen.
For example you can include the 877-NXX calls. In our example they do not have any applicable surcharge
4. Press **OK** to save your work and leave the screen.

Editing surcharges

1. Open **Pricing/Surcharge**.
2. Overwrite existing values with new ones and press **OK** to save changes.

Recurring Charge

Recurring Charge is a dollar amount that would be applied as a fixed charge for such as: use of the phone equipment, access to multiple telephone lines, etc. It can be calculated as applied, daily or monthly.

1. Click on the **Pricing** menu item.

2. Click on **Recurring Charge**. This will open the **Recurring Charge** screen. In the above example **Recurring Charge** is \$10.00. Assuming the **Recurring Charge** box on the **Users** screen is checked it will be added to your guest/tenant bill on monthly basis. Otherwise, **User** will not be charged for it.
3. Enter the value of recurring charge in **Amount** text box.

4. Check one of the **Apply** option buttons depending if you want to apply charges daily or monthly.
 5. Click on **OK** when finished.
-

Recosting

The **Recosting** function allows you to recost records that were already processed. You can either increase or decrease selected telephone calls by a percentage or run **Quick Recosting** if for some reason calls didn't get priced the first time (which would apply originally selected **Carrier** and **Surcharge**.)

Accessing recosting

1. Open the **Pricing** pull down menu and click on **Recosting**.
The **Recosting** window shows up on the screen.
 2. Select the **Quick Recost** option button to recost your calls using originally selected carrier and Surcharge
OR
Select the **Percentage Adjustment** option button to recost your calls using either + or — percentage adjustment. Note that **Actual Cost** and **Guest Charges** options become available.
 3. **Actual Cost** is the cost applied by the V&H rate tables or Custom Pricing. It is the actual cost of the telephone call before any surcharges or multipliers are added.
 4. **Guest Charges** is the cost after surcharges and/or multipliers are applied (i.e., it includes the actual cost of the telephone call plus additional costs).
 5. After you have made appropriate selection click on **OK**. The screen similar to the report screen will appear. It enables you to select the records that you would like to recost. Enter criteria following steps 3, 5 to 10 of the **REPORTS** section. Click on **OK** to start recosting. **TALITY** will prompt you with the message for confirmation. Click on **OK** and program will recost selected call records.
-

Edit Destination File

The **Destination File** contains most of the area codes and exchanges, along with city and state names that may be directly dialed from your area code. You can create a new exchange or area code whenever a new one is added.

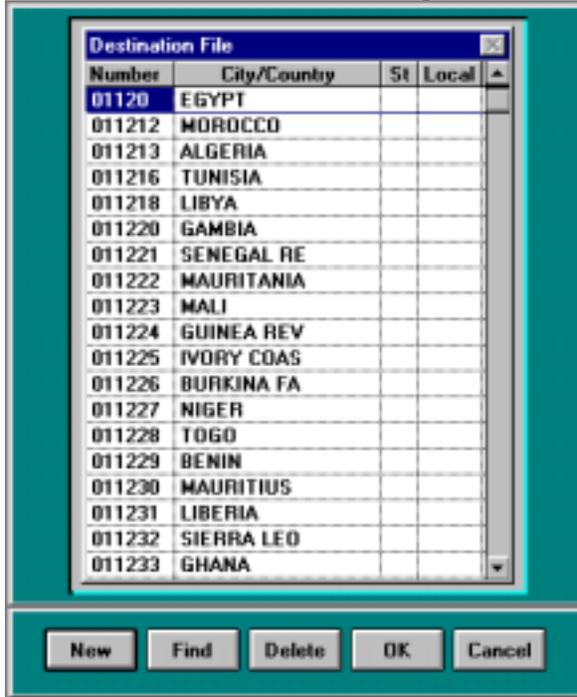
There is only one **Destination File** that is shared among all **Carriers**, including the **Default** and **Operator Assisted**. If you make a change in the **Destination File**, it will affect all of the **Carriers**.

This is also where you identify your local exchanges. Note that the installation program will identify all or most of your local exchanges. Find the area code and exchange for your area. (Consult your local telephone book for details.) Under the **Local** field of the **Destination File** enter **Y** for **YES**.

Finding a record

1. Open the **Pricing** menu.
-

2. Click on the **Edit Destination File** to open the **Destination File** screen.



3. Click on the **Find** button. Enter the number you would like to look for in the **Find Number** text box and click on **OK** to proceed with the search.

Adding new area code or exchange

1. Click on the **New** button. TALITY places the cursor in an empty row of cells. Enter the appropriate values:
2. In a **Number** field enter the area code and exchange or special country code for a new record. Enter the description of the record under **City/Country**. Type in the state under the **ST** field. If it is your local exchange enter **Y** for **Yes** in a **Local** field.
3. Click on **OK** to save changes and exit.

Changing a record

1. Place the cursor in a field you want to edit. Type in the new values.
2. Click on **OK** to save changes and exit.

Deleting a record

Click anywhere on a record to be deleted and click on **Delete** button.
The record is deleted.

Import V&H Pricing Data

This utility enables you to import updated **V&H Pricing Files**.

The **V&H Pricing files** have to be saved in the **TALITY** directory for this utility to work.

1. Click on the **Pricing** on the Main Menu.
2. Click on **Import V&H Pricing Data**.
The message “This process will load V&H Pricing data” appears.
3. Click on **OK** if you want to proceed, **Cancel** if you want to abort.
4. The message “This process will overwrite current pricing information” may appear.
Press **Enter** to **OK**

If message “**V&H PRICING FILES NOT FOUND IN THE TALITY DIRECTORY**” appears, make sure that the updated file are in **\TALITY** directory and that you have entered correct telephone number (i.e. 201-593-1212 if your pricing files are 201 593 area and exchange code) on System Parameters Screen.

Import Destination File Data

Occasionally you may purchase or receive from your dealer a new **City and State Database**. This file needs to be imported using the “Import Destination File Data” utility.

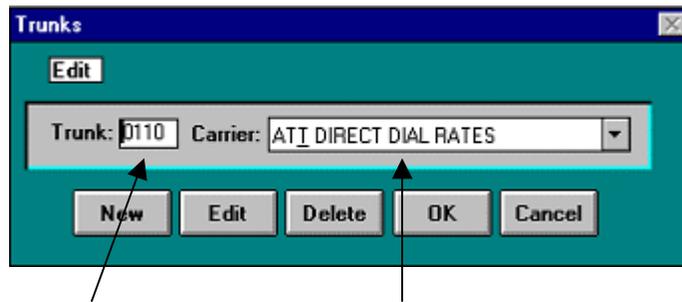
The **Destination File Data files** have to be saved in the **TALITY** directory for this utility to work.

1. Click on the **Pricing** menu option.
2. Click on **Import Destination File Data**.
The message “This process will load Destination File data” appears.
3. Click on **OK** if you want to proceed, **Cancel** if you want to abort the action.
4. The message “This process will overwrite current files” may appear.
Click on **OK**

If message “**DESTINATION FILES NOT FOUND IN THE TALITY DIRECTORY**” appears, make sure that the updated file are in **\TALITY** directory and that you have entered correct telephone number (i.e. 201-593-1212 if your pricing files are 201 593 area and exchange code) on System Parameters Screen.

Trunks

The **Trunks** screen enables you to edit, to delete or to add new trunk.
Open **Pricing**. Click on **Trunks**. The **Trunks** screen appears.



Trunk number

Carrier description

Adding a new trunk

1. Click on **New** button.
Enter trunk number in the **Trunk** text box.
2. Click on a down arrow of the **Carrier** text box to invoke a list of carriers. Choose the appropriate carrier.
3. Click on **OK** to save the changes. The message “Information Saved” will appear in the left corner of your main screen.

Editing an existing trunk

1. Click on the **Edit** button.
The list of all the trunk records appears. Choose from the list and click on **OK**.
2. Make appropriate changes, and click on **OK** to save the changes. The message “Information Saved” will appear in the left corner of your main screen.

Deleting a trunk

1. Bring up a desired record by using **Edit** button (see To edit an existing trunk).
2. Click on **Delete** button.
3. TALITY prompts you to confirm deletion with the message.
Click on **OK**. The record is deleted.

Controls

Call Editor

The **Call Editor** allows you to modify existing call records as well as add information for calls made outside your telephone system. Once you have entered the information, the changes are permanent.

Accessing Call Editor

1. Open the **Controls** menu.
2. Click on the **Call Editor**. Call Editor screen appears.
3. Set the selection criteria following the steps 3, 5 to 10 of the REPORTS section. Click on **OK** when done. **Call Editor** screen shows up.

Call Editor Screen expands to the right with more information. To move to the right of screen use Tab key or scroll bar, to move to the left of screen use Shift-Tab key or scroll bar.

To edit call information highlight record to be changed and overwrite existing values with new ones.

Every field can be edited.

Components of a Call Record

Date:

Date of Call (provided by either Telephone system or computer; depends on the Telephone system).

Time:

Time of Call provided by Telephone system.

Hours, Minutes, Seconds:

Length of Call provided by Telephone system.

Extension:

Extension that either originated or terminated a phone call.

Trunk:

Although this information is provided by the Telephone system, it must be entered during the configuration of TALITY to ensure proper pricing.

Dir - Call Type: I = Incoming

O = Outgoing

P = Outgoing calls that are not priced

U = Unrecognized

OA (Operator Assisted), Area Code and Telephone Number:

Describes the telephone number dialed.

Area:

Area code of the dialed number

Phone number:

Dialed phone number

Actual Cost:

Actual cost associated with Trunks and Carriers.

User Charges:

Combination of Actual Cost and Surcharge/Multiplier.

Authorization Code:

A unique identifier optionally used for administrative extensions.

Adding a call record

1. Click on **New** button.
2. Type in information for a new call record.
3. Click on **OK**.

Deleting a call record

1. Position cursor on the record to be deleted.
2. Click on **Delete** button.
Note that call record will be deleted once you exit Call Editor.

Recosting a call record

1. Position cursor on the record to be recosted.
2. Click on **Recost** button.
The call record will be recosted based on the currently assigned carrier to selected record's trunk and surcharge type assigned to User.
3. To exit click on **OK**.

System Parameters

The System Parameters information has to be defined before using TALITY software.

1. Open **Controls** menu.
2. Click on **Systems Parameters**. System Parameters screen appears.

System Parameters

Telephone System: Northern Telecom SL1

Use Date From

Computer
 Phone System

Store Calls

Both
 Outgoing Calls Only
 Incoming Calls Only

Minimum Call Length

[hh:mm:ss]
00:00:00

Custom Pricing Increments

First Minute: 6 Secs
Next Minute: 6 Secs

Additional Parameters

Your Telephone Number: (973)-593-8200
Price Calls Every: 15 Minutes Default Credit Limit: 50.00
Full Access Password: Second Level Password:
Third Level Password: Report Page Length: 60 Lines
Save Archived Calls For: 3 Months

Auto Archive/Optimize Run: Weekly on Sun at 02:00
 Show Authorization Code On Reports
 Price Operator Calls
 Surcharge Operator Calls
 Disable V+H Pricing
 Disable Credit Limit Checking
 Separate V+H Long Distance and International Rates
 Do Not Print Zero Cost Calls on Bill
 Still print Bill when Guest/User owes recurring charge ONLY
 Remove Guest/User After Billing (Default)

Tax	Description
1: 6.00%	State
2: 3.00%	Local
3: 10.00%	Trisys Tax

Report Header: Financial Northeastern Companies
Report Footer: (Bills)

OK Cancel

3. Enter appropriate values and descriptions for your system using the guidelines below.

TELEPHONE SYSTEM field allows you to change the make and model of the telephone system to which TALITY is connected.

Press on the down arrow of the Telephone System text box to invoke the list of available telephone systems. Click on the name of your phone equipment.

USE DATE FROM - The date information will come from either the telephone system or the clock in your PC. You should select **Computer** only if you have a clock-calendar in your PC or if your phone equipment does not generate date information on the SMDR output.

STORE CALLS - Select what type of calls TALITY will process **Outgoing Calls Only**, **Incoming Calls Only** or **Both**.

MINIMUM CALL LENGTH - TALITY will store only calls that are longer than specified time.

CUSTOM PRICING INCREMENTS – This feature will specify in how many seconds per increment TALITY will price calls if Default Pricing is used to price the calls (this option will not apply to V&H pricing table if you are using one). Click on **First minute** and enter a number of seconds, click on **Next minute** and enter a number of seconds for each additional minute.

ADDITIONAL PARAMETERS

YOUR TELEPHONE NUMBER - Enter your company's main telephone number. (DO NOT USE 800 NUMBERS).

PRICE CALLS EVERY - This field defines the time interval for automatic pricing updates. The time interval refers to a time during which NO KEYS WERE PRESSED ON THE KEYBOARD AND THERE WAS NO MOUSE ACTIVITY. For example, if you define this field as 15, then every 15 minutes the system will process calls that came in since the last update (providing, the keyboard wasn't touched). While the processing takes place, a window will pop up with the message "PROCESSING CALLS....PLEASE DO NOT TOUCH THE KEYBOARD OR THE MOUSE".

Note: In the event that any of TALITY's pull-down menus are displayed, (i.e. Controls or Administration) automatic call updates will not work. Only the Main Screen can be displayed.

DEFAULT CREDIT LIMIT - This field defines the default guest credit limit amount for all guests. This amount is displayed in the Users screen, and it can be changed if desired. If any guest exceeds the credit limit defined in this field, TALITY will notify you

FULL ACCESS PASSWORD - Type up to 6 characters for a password. It will make all features of TALITY available to the user of this password.

SECOND LEVEL PASSWORD – Type up to 6 characters for a second level password.

THIRD LEVEL PASSWORD - Type up to 6 characters for a password that would not let user change Controls and Pricing in TALITY.

REPORT PAGE LENGTH - Indicate how many lines you would like to have per report page.

SAVE ARCHIVED CALLS FOR () MONTHS – after you run a billing report the old call records can be saved in an archive database as a result of running Archive utility or setting the automatic Archive/Optimize option. This field specifies how long would you like to keep them there. While in archive database the records are available for reporting. If you do not want to save call records at all enter 0 for months and records will be marked for deletion. TALITY will actually delete them

after you run Optimize (Controls/Optimize).

AUTO ARCHIVE/OPTIMIZE – set this option if you would like the call records be archived and optimized periodically.

In our example the calls will be archived and optimized automatically every week (**Run:** Weekly), on Monday (**Day:** Mon), at 2 AM (**hh:mm:** 02:00).

PRICE OPERATOR CALLS – price the 0+ calls according to the set rates.

SURCHARGE OPERATOR CALLS – if checked the surcharges are applied to the 0+ calls

DISABLE V&H PRICING

DISABLE CREDIT LIMIT CHECKING

SEPARATE V&H AND LONG DISTANCE AND INTERNATIONAL RATES

REMOVE USER AFTER BILLING (DEFAULT) – if checked TALITY deletes Users name after he has been billed. This is a default value.

DO NOT PRINT ZERO COST CALLS ON BILL – if checked no cost calls (for example: 800 calls or some of the local ones) do not appear on bills.

STILL PRINT BILL WHEN GUEST/USER OWES RECURRING CHARGE ONLY

REMOVE GUEST/USER AFTER BILLING (DEFAULT)

SHOW AUTHORIZATION CODES ON REPORTS will suppress your organization's authorization codes on reports if you enter **N** for No. To display the authorization codes on your reports, enter **Y** for Yes.

TAX and DESCRIPTION - TALITY can apply up to three different taxes to the telephone call's cost. You may also change descriptions that would show on the billing report.

REPORT HEADER - use this field to enter the name and address of your property that would print on guests' bills as well as reports.

REPORT FOOTER will show on the bottom of your billing reports.

4. To save changes click on **OK**.

System Access

Systems Access is used to set up user passwords and permissions. It is strongly suggested to set up an administrator password first – with access to **TALITY Controls/System Access**. Once any passwords are set, TALITY becomes password protected and only users with access to **Controls/System Access** can manipulate user permissions.

Adding a new System Access profile

1. Open the **Controls** menu option.
2. Click on **System Access**.
System Access screen appears.

The screenshot shows the 'System Access Control' dialog box. The 'Description' field is set to 'BillPrinter' and the 'Password' field is set to '1234'. The permissions are organized into several categories:

- Guest / User** (checked):
 - Add Guest / User
 - Change Guest / User
 - Delete Guest / User
 - Print Bill for Guest / User
- Reports** (checked):
 - Credit Limit Alert
 - Profit
 - Guest / User Activity
 - Phone Activity by Authorization Code
 - Department Activity
 - Area Code Activity
 - Extension Activity
 - Phone Activity By Date
 - Phone Activity By Telephone Number
 - Trunk Activity
 - 20 Longest Calls
 - 20 Most Active Extensions
 - 20 Most Frequently Called Phone Numbers
 - 20 Most Expensive Calls
 - Batch Billing
- Pricing** (unchecked):
 - Custom Pricing
 - Surcharge
 - Recurring Charge
 - Recosting
 - Edit Destination File
 - Import VLL Pricing Data
 - Import Destination File
 - Trunks
- Controls** (unchecked):
 - Call Editor
 - System Parameters
 - System Access Control
 - Property Management System
 - Telephone Filter
 - Archive Calls
 - Optimize
 - Print Setup
- Help** (unchecked):
 - Help

At the bottom right, there is a 'Check All' checkbox. At the bottom of the dialog are buttons for 'New', 'Edit', 'Delete', 'OK', and 'Cancel'.

3. Enter the name of the user profile in the **Description** text box.
4. Go to the **Password** text box and enter the password.

5. Check the appropriate permissions for this user profile.
Following our example above – the user profile “BillPrinter” has been assigned password “1234”. This password is given to employees responsible for billing customers. They have access to **Guest/User** screens, **Guest/User Activity Report**, **Credit Limit Alert Report** and **Batch Billing**. They do not have any access to any other reports and screens.
6. Click on **OK** to save user profile.

Editing System Access user profile

1. Open the **Controls** menu option.
2. Click on **System Access**.
The **System Access** screen appears.
3. Click on **Edit**.
The list of available user profile names appears.
4. Double click on the profile name.
System Access Control screen displays this profile’s information.
5. Make appropriate changes and click on **OK**.

Deleting System Access profile

1. Open the **Controls** menu option.
2. Click on **System Access**.
System Access screen appears.
3. Click on **Edit**.
The list of available user profile names appears.
4. Double click on the profile name.
System Access Control screen displays this profile’s information.
5. Click on **Delete**. TALITY displays the confirmation message.
6. Click on **OK** to confirm deletion. The user profile is deleted

Property Management System

TALITY is designed to work with your Property Management System (PMS).

The information about your guests' phone will be sent to the PMS as soon as calls are priced.

In the event that your PMS is down, TALITY gives you an option to send PMS data directly to a printer. Additionally, you can send the guest phone data to the PMS and the printer at the same time.

TALITY must have a dedicated COM Port for the collection of SMDR data from your telephone system. That is why if you choose to interface with the PMS system via a COM Port (Serial or RS-232 port) make sure that this port doesn't conflict with the dedicated one.

Defining the PMS parameters

1. Open **Controls** menu.

2. Click on **Property Management System**. Property Management System screen appears.

Property Management System

System: **HOBIC Format (Protocol III)** Format

Port: **COM1** File Name: Select File

Baud: **9600** Transmit Admin extensions to Property Management System

Parity: **None** Location Identifier:

Data Bits: **8** Do Not Print

Stop Bits: **1** Print All Posted and Unposted Records

Print Unposted Records Only

Flow Control

No Flow Control

ACK/NAK

XON/XOFF

ENG

Transmit ENG (05h) before each call record

Maximum attempts to transmit ENG (05h):

Checksum

None

BCC/LRC (Block Control/Longitudinal Redundancy Check)

CRC (Cyclic Redundancy Check)

Maximum attempts to transmit call record

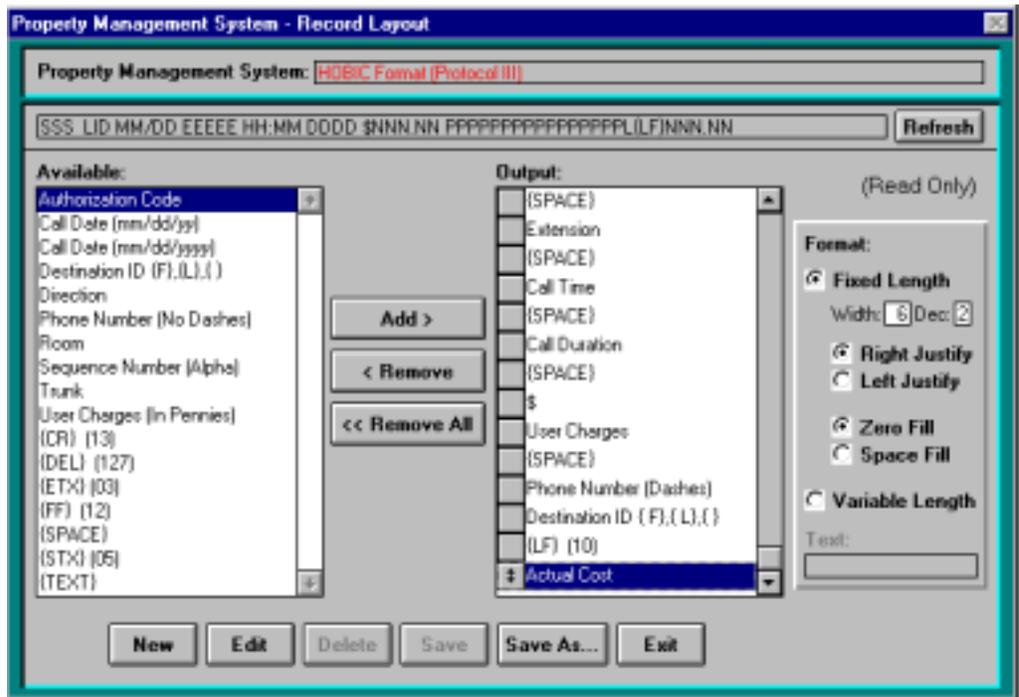
Maximum time to wait for ACK/NAK (Secs)

Maximum delay between call records (Secs) ..

OK Cancel

Click on the down arrow of the **System** box to invoke the list of the available systems.

3. Choose the **Property Management System** that the property has installed and click on it.
4. In case your Property Management System is not on the list click on the **Format** button.
The Property Management System – Record Layout screen appears.



This screen allows you to create the new record format that would meet the demands of your PMS .It also displays information about record formats for the existing systems.

There are two ways to create a new record format. You can either use an existing format as a template or start from scratch by pressing **New**. In any case new format will have to meet the requirements of your PMS (refer to PMS documentation for more information).

CREATING NEW RECORD FOMAT USING AN EXISTING FOMAT AS A TEMPLATE

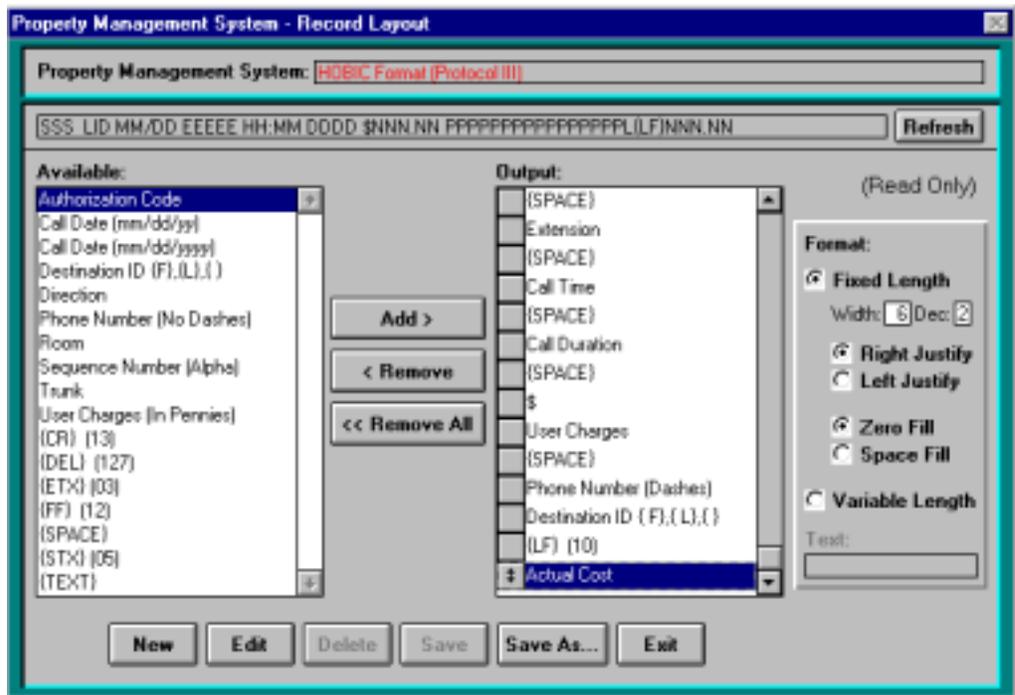
- a. In case you would like to modify the existing format and save it under a new name click on **Edit**. **Property Management Systems** list comes up on a screen. Highlight the name of the PMS format that you would like to make changes to and click on **OK**.
- b. **Record Layout** screen displays now a record format information about the selected system.
- c. The name of the system appears on the top of the screen in **Property Management System** text box. It is shown in red (it cannot be changed) as opposed to the name of a record format created by you.
- d. The line below system's name represents format of each record sent to the PMS. You can manipulate the information it contains by using the controls below.
- e. **Available** list box displays the fields and characters that can be incorporated in a record format. You can accomplish this task by transferring them to **Output** list box. The way to do this is to highlight the required field and click on **Add>** command button. You can see that the given item promptly appears in **Output**

box. You can also remove any item by clicking on **<Remove** or **<<Remove All**. You will also notice that the top format line has changed as a result of the changes performed on **Output** box. Top format line reflects data in **Output** box.

- f. In order to change settings for the properties of the items listed in **Output** box highlight the particular item. Note that all format information is listed in **Format** box located to the right of **Output** box. You can change available settings by clicking on the option buttons or changing values in the text boxes. To make sure that changes take effect click on the **Refresh** button in the upper right corner of the screen. At this time the top format line should reflect all modifications.
- g. When finished editing you can save changes by clicking on the **Save As** button positioned on the bottom of the screen.
Note that only **Save As** option is available to prevent you from overwriting the original record format for the existing PMS.
The **Save As** box appears. Enter the name of the PMS record format. Tality will not save the format if the name duplicates another PMS format name already listed by the program.
Click on **OK**.
- h. Click on **Exit** to go back to **Property Management System** screen

CREATING NEW RECORD FOMAT FROM SCRATCH

- i. If you decide that you would rather create a record format for your PMS from scratch click on **New** button and start with the blank form.
- j. Fill in the name of your system in **Property Management System** text box. The name has to be different than any name listed by the program.



Having in mind what record format is required for your PMS (refer to the PMS documentation) highlight the required fields and characters in **Available** list box and transfer them one by one to **Output** box using **Add>** button. You can also remove the unwanted items from **Output** box by clicking on **<Remove** or **<<Remove All** button.

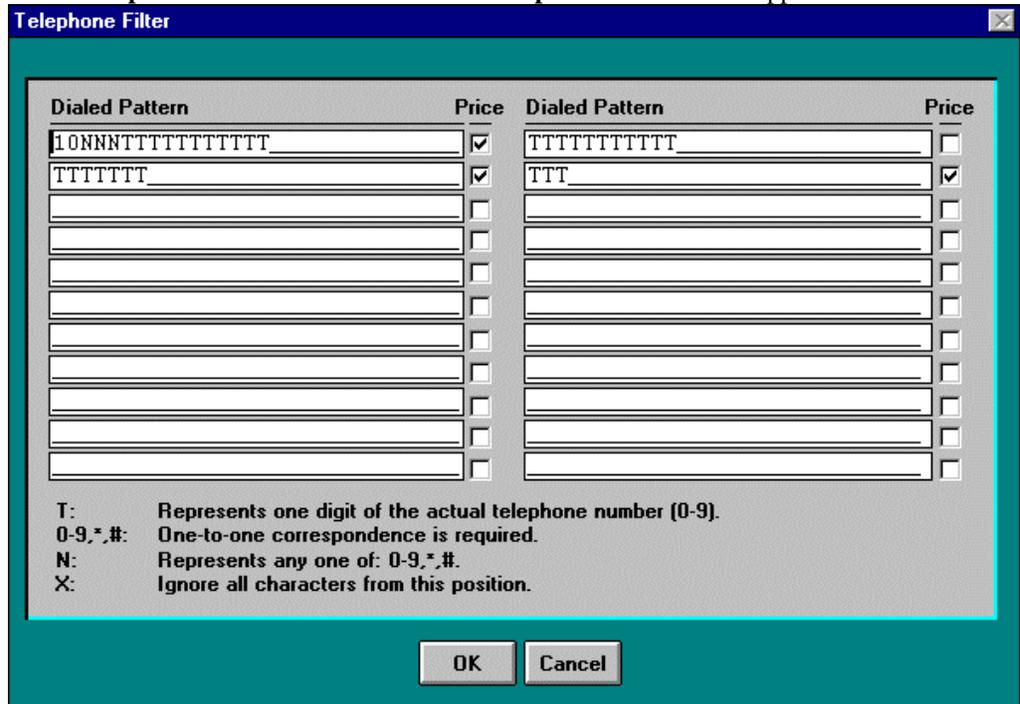
- k. Note that all changes applied to **Output** box are projected to the record format line located below **Property Management System** text box.
- l. In order to change settings for the properties of the items listed in **Output** box highlight the particular item. Note that all format information is listed in **Format** box located to the right of **Output** box. You can change available settings by clicking on the option buttons or changing values in the text boxes. To make sure that changes take effect click on the **Refresh** button in the upper right corner of the screen. At this time the top format line should reflect all modifications.
- m. To save the record format for your system click on **Save**. Make sure that you have entered format name. The name of a new PMS format has to be different from any of the names listed by Tality, or the program will not save it. You can also use the **Save As** option and name new format while saving it.
- n. If you want to delete any record format bring it to the screen by clicking on **Edit** and choosing the format name from the list. Click on **Delete**. The program prompts you to confirm deletion. Click on **OK**.

Note that Tality lets you delete only records created by you as opposed to the records listed by the program.

- o. Click on **Exit** to go back to **Property Management System** screen.
5. Now that an appropriate name for your system's record format is displayed proceed with setting up your **Property Management System** (see the picture on page 59). Pull down the **Port** listing. Select available COM Port or choose **File**. If you selected **File** option the **Select File** button and the **File Name** text box become active. You can enter the Path and the File name that your Property Management System can work with into the text box or you can browse for it by clicking on **Select File** button.
6. Enter communication parameters **Baud rate, Parity, Data Bits** and **Stop Bits**.
7. **Transmit Admin extensions to Property Management System** – check this box if you want to process call records for extensions assigned to employees.
8. Enter the 3-character value identifying the installed location in **Location Identifier** field.
9. Select Print option:
Do Not Print - PMS data will not be sent to the printer at all (default setting).
Print All Posted and Unposted Records – PMS data will be sent to the PMS and the printer at the same time.
Print Unposted Records Only - PMS data will be sent to the printer in the event that the PMS link is broken or PMS is unavailable.
10. Depending on your Property Management System's requirements check one of the 3 option buttons in the **Flow Control** option group.
No Flow Control – the Tality sends a record to PMS and does not require any acknowledgement.
ACK/NAK – sending of a call record to PMS has to be acknowledged by Tality software. This is a default value.
XON/XOFF – sending of a call record to PMS has to be acknowledged by hardware.
11. **ENQ** check box enables you to transmit the inquiry to the PMS system before the record is sent to verify if the system is ready to receive data. This option is only available with **ACK/NAK** type of flow control.
12. **Maximum attempts to transmit call record...** - how many times Tality will attempt to send out the same call record. Available only for the **ACK/NAK** flow control.
13. **Maximum time to wait for ACK/NAK (Secs)....** - how long Tality will wait for an acknowledgment of record receipt from PMS. In case an acknowledging signal is not received on time the record is regarded as not sent and Tality will attempt to send it out again. That is the reason you should consider the take care when setting this option and refer to the PMS documentation if necessary.
This option is available for the **ACK/NAK** flow control only.
14. **Maximum delay between call records (Secs)....** - time interval TALITY will be waiting before sending next record. This option is available for all sorts of flow control.
15. If you would like to save the settings click on **OK** or otherwise click on **Cancel**.

Telephone Filter

1. Click on **Controls** on the TALITY Main Menu.
2. Select **Telephone Filter** and click on it. The **Telephone Filter** screen appears.



The **Telephone Filter** is comprised of two functions. One function provides a method of defining whether or not certain types of calls, based on the dialing pattern, are to be priced. For example, if you define a local call dialing pattern with **Price** field left empty, no costing information will apply to those calls. If you define another type of call with **Price** field checked, those calls will be priced accordingly.

The second function of the **Telephone Filter** enables you to separate the actual telephone number from the rest of the characters that have been keyed in through a telephone keypad or output by your telephone system. It will read the SMDR input data and strip off the numbers not related to actual telephone number digits.

After TALITY has been installed and some calls have come in, use **the Phone Activity by Date** report to check for calls that have not been recognized by the program. You can then determine if you should make changes to the **Telephone Filter** screen.

Dialed Pattern is a special sequence of the characters that define the telephone number in the SMDR output. Some examples include calls made through MCI or SPRINT, calls made using a prefix, and calls made to beepers.

The following characters are used to define the dialing patterns to the **Telephone Filter** function:

"T" - Represents one digit of a telephone number, any digit between 0 and 9.

"0 - 9, *, #" - Any of these specific characters in the dialing pattern that correspond to the actual character that was dialed.

"N" - One character of the dialed character string (0 - 9, *, #) that is not part of the actual telephone number.

"X" - Ignore all characters from this point on (**can be used only after the longest dialing pattern**).

The following are examples of dialing patterns:

DIALED COMBINATION	PATTERN
9-547-7676 (Local outside call)	9TTTTTTT
589-1212	TTTTTTT
9-1-203-589-1212	9TTTTTTTTTTT
9-0-203-589-1212	9TTTTTTTTTTT
1-203-589-1212	TTTTTTTTTTT
0-203-589-1212	TTTTTTTTTTT
203-589-1212	TTTTTTTTTTT
1-865-4156 (Intralata)	TTTTTTTTT
0-865-4156	TTTTTTTTT
10244-1-677-3100	10NNNTTTTTTTT
10244-0-677-3100	10NNNTTTTTTTT
10288-1-203-589-1212	10NNNTTTTTTTTTTT
10288-0-203-589-1212	10NNNTTTTTTTTTTT
4994-1-212-655-0909	4994TTTTTTTTTTT
(To access a specific long distance trunk, e.g., AT&T or MCI Sprint) 01-49-81552203 (International operator assisted call)	DO NOT CREATE ANY PATTERN

011-49-81552203
(International call)

**DO NOT CREATE ANY
PATTERN**

3. Enter required dialing patterns.
4. Click on **OK** to save the changes.

Archive Calls

This facility will move selected call records from TALITY database to the archive file.

Accessing Archive Calls screen

1. Choose **Controls/Archive Calls**.
2. **Archive Calls** screen appears. In order to set the appropriate criteria follow steps 3, 5 to 10 REPORTS section. Click on **OK**.
3. TALITY will prompt you for confirmation of an archive process.
4. Click on **OK** to proceed with archiving. When the process is finished the program notifies you with the appropriate message.

Optimize

The Optimize function is very important. It removes all deleted records from the files and rebuilds all database indexes therefore improving overall performance. It is recommended that you run this utility once a month to keep your TALITY System running efficiently.

Accessing Optimize Utility screen

1. Open **Controls** menu
2. Click on **Optimize**. The Optimize Utility screen will appear
3. Click on **OK** to proceed with the operation.
4. When finished the program will notify you with the message "Optimize completed"

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Contents

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Technical Support

Technical Support from Trisys, Inc.

Free Technical Support is available, by calling 973.360.2300 to all registered users of TALITY for 30 days from the date of the first call. Extended Technical Support plan is available. Please contact your dealer or Trisys, Inc. for details.

Trisys, Inc.
215 Ridgedale Avenue
Florham Park, NJ 07932

Visit also Trisys Web site <http://www.trisys.com> when looking for help in troubleshooting your software.

When calling Technical Support please have the following information ready in order to expedite your call.

- Serial number of the TALITY software.
- Version number.
- Com Port Settings.
- Cable specifics for PBX Connection (start to finish cable type/any adapters?).
- PBX type (name and model).
- Computer specs - your processor type and speed.
- The amount of free disk space.
- The amount of RAM.

Troubleshooting

If Tality is running and collecting data but Pricing and Controls menu options are not accessible (appear grayed out):

Modify the command line of the shortcut to read:

c:\tality\tality.exe /S where c:\tality is the location of the Tality files.

Close and reopen Tality to confirm that these options are now available.

Communication Errors

When a communications error occurs, Windows locks the communications port until special function clears the error. This function returns error value and COMSTAT structure that is the device status.

On your screen you will get the message containing the value of the error and the COMSTAT structure.

- 16** **BREAK** Hardware detected a break condition.
- 32** **CTSTO** CTS (clear-to-send) timeout. While a character was being transmitted, CTS was the duration specified by the fCtsHold member of the COMSTAT structure.
- 2048** **DNS** Parallel device was not selected.
- 64** **DSRTO** DSR (data-set-ready) timeout. While a character was being transmitted, DSR was low for the duration specified by the fDsrHold member of COMSTAT.
- 8** **FRAME** Hardware detected a framing error.
- 1024** **IOE** I/O error occurred during an attempt to communicate with a parallel device.
- 32768** **MODE** Requested mode is not supported, or the idComDev parameter is invalid. If set, CE_MODE is the only valid error.
- 4096** **OOP** Parallel device signaled that it is out of paper.
- OVERRUN** Character was not read from the hardware before the next character arrived. The character was lost.
- PTO** Timeout occurred during an attempt to communicate with a parallel device.
- 128** **RLSDTO** RLS (receive-line-signal-detect) timeout. While a character was being transmitted, RLS was low for the duration specified by the fRlsdHold member of COMSTAT.
- 1** **RXOVER** Receiving queue overflowed. There was either no room in the input queue or a character was received after the end-of-file character was received.
- 4** **RXPARTY** Hardware detected a parity error.
- 256** **TXFULL** Transmission queue was full when a function attempted to queue a character.

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