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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™ IV based PC
- Microsoft™ Windows 2000 SP3 / XP Professional / 2003 / Vista Business
- 1 GB RAM (2 GB RAM in case of MS Vista)
- 100 GB available hard disk space
- Network card
- Video capable of a minimum screen resolution of 1024 x 768
- Printer driver must be installed on your system
- Power Management feature of your system must be disabled
- 1 dedicated COM port for SMDR (if SMDR data is collected via COM port)
- 1 dedicated COM port for PMS (if using PMS system)

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 com port 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, each 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 Server

1. Insert **Tality** CD into the CD ROM drive. The **Tality 5 - InstallShield Wizard** screen appears. Click on the **Next** button.

2. The **License Agreement** screen comes up.
   Click on the **I accept the terms of the license agreement** option to check it.
   Click on the **Next** button.

3. The **Tality 5 Setup Selection** screen comes up.
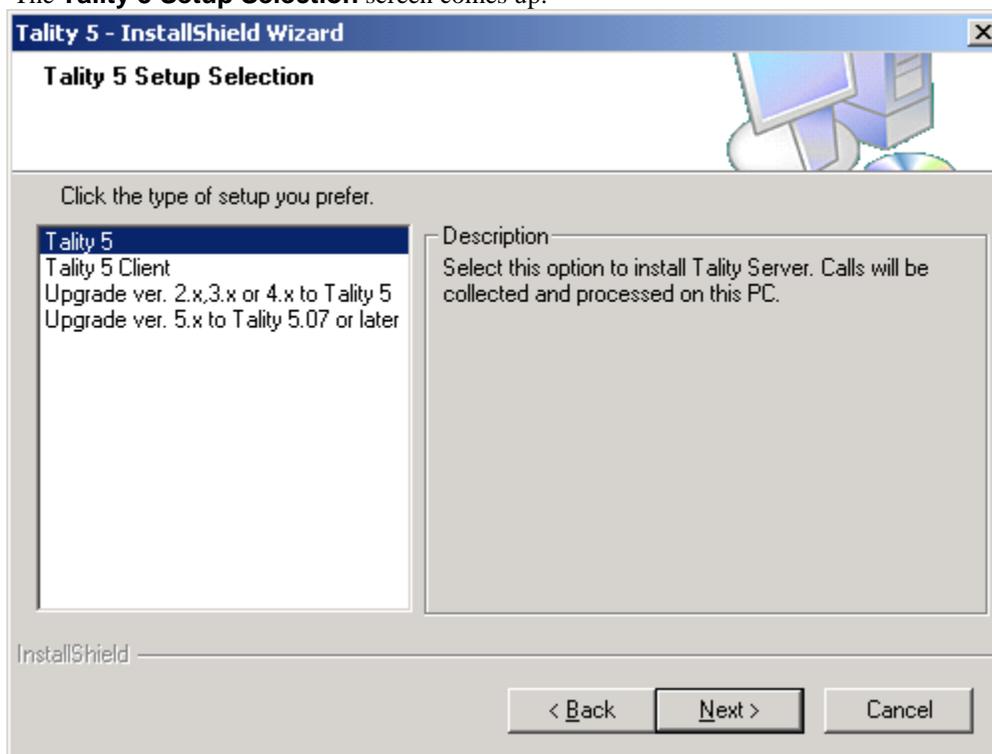
Select **Tality 5** to install TALITY Server.
Calls will be collected and processed on this PC.
Click on the **Next** button.

NOTE: The Tality Sever PC needs to go through registration after Tality has been installed and running. To register your software go to www.trisys.com, option Register. If not registered the software will stop working in 30 days.

4. The **Choose Destination Location** screen is brought up.
   Accept the default installation folder or click on the **Change...** button to change a destination drive or folder.
   Click on the **Next** button.

5. The **Ready to Install the Program** screen appears.
   Click on the **Install** button.
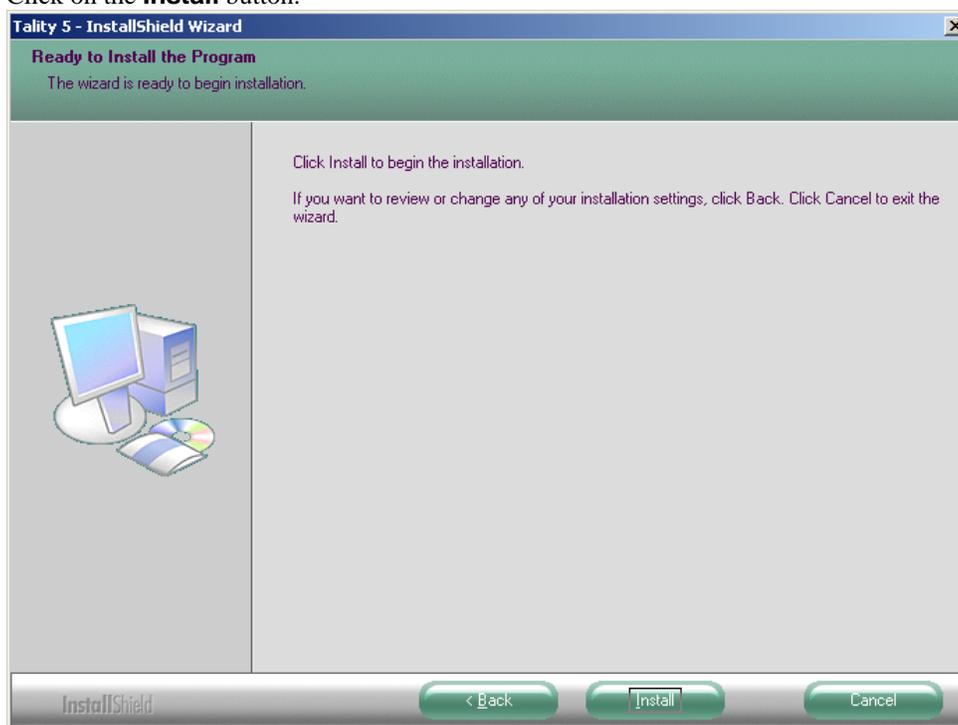
6. Program installs TALITY files and updates your system.
   Installation program displays a message asking if your TALITY software has a serial number. If you have a serial number click on **YES**, otherwise click on **NO** and TALITY will be installed as a trial version.

7. If you have a serial number, the **Enter Serial Number** screen appears. Enter your software's serial number.
   Click on **OK**.

8. When installation is completed the setup program displays a screen with the **InstallShield Wizard Complete** message.
   Click on **Finish**.
   It is recommended to restart the computer.

Installing TALITY Client

1. Insert **Tality** CD into the CD ROM drive. **Tality 5** - **InstallShield Wizard** screen appears. Click on the **Next** button.

2. The **License Agreement** screen comes up.
   Click on the **I accept the terms of the license agreement** option to check it.
   Click on the **Next** button.

3. The **Tality 5 Setup Selection** screen comes up.
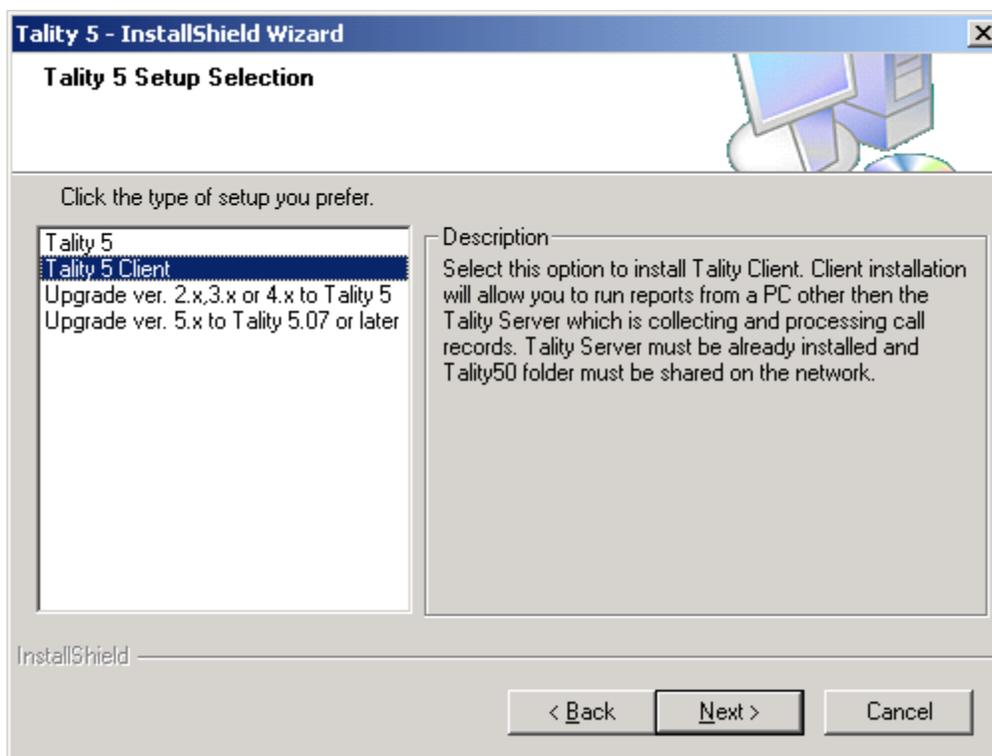
Select **Tality 5 Client** to install TALITY Client.
Note: TALITY Server must be already installed and Tality50 folder must be shared on the network.
When you install TALITY Client you will be able to run reports from TALITY Client machine as well as from TALITY Server.
TALITY Client PC does not collect calls and does not need to go through registration.

4. The **Select Tality50 folder on the Tality Server** screen comes up.
   Enter the path to the Tality50 folder residing on the Tality Server into the **Path** field or find it using the **Directories** tree.
   Click on **OK**.
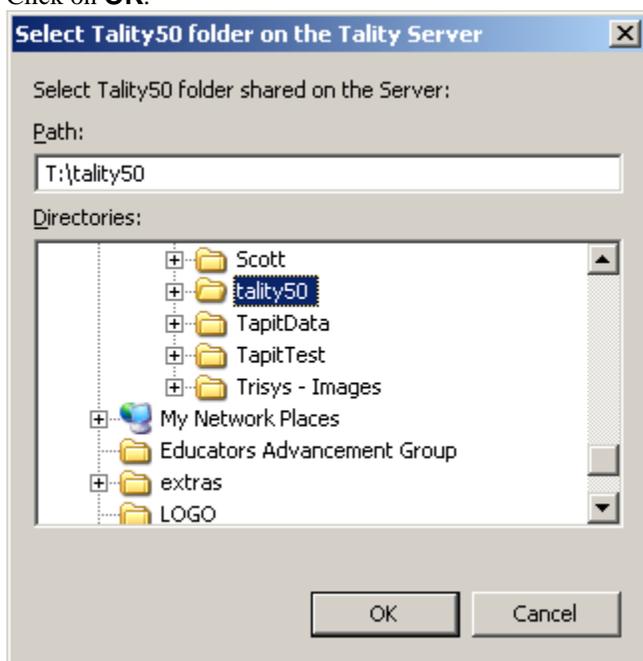
5. The **Ready to Install the Program** screen appears.
6. Click on **Install**. Program installs TALITY files and updates your system.
7. When installation is completed the setup program displays a screen with the **InstallShield Wizard Complete** message.
8. Click on **Finish**.
   It is recommended to restart the computer.

Upgrading TALITY ver. 5

Follow the instructions below only if you currently have Tality 5 version prior to Tality 5.07.
NOTE: Please make sure the old TALITY application and the SMDR Monitor are CLOSED before proceeding.

1. Insert **Tality** CD into the CD ROM drive. **Tality 5 -** the **InstallShield Wizard** screen appears.
   Click on the **Next** button.

2. The **License Agreement** screen comes up.
   Click on the **I accept the terms of the license agreement** option to check it.
   Click on **Next**.

3. The **Tality 5 Setup Selection** screen comes up.
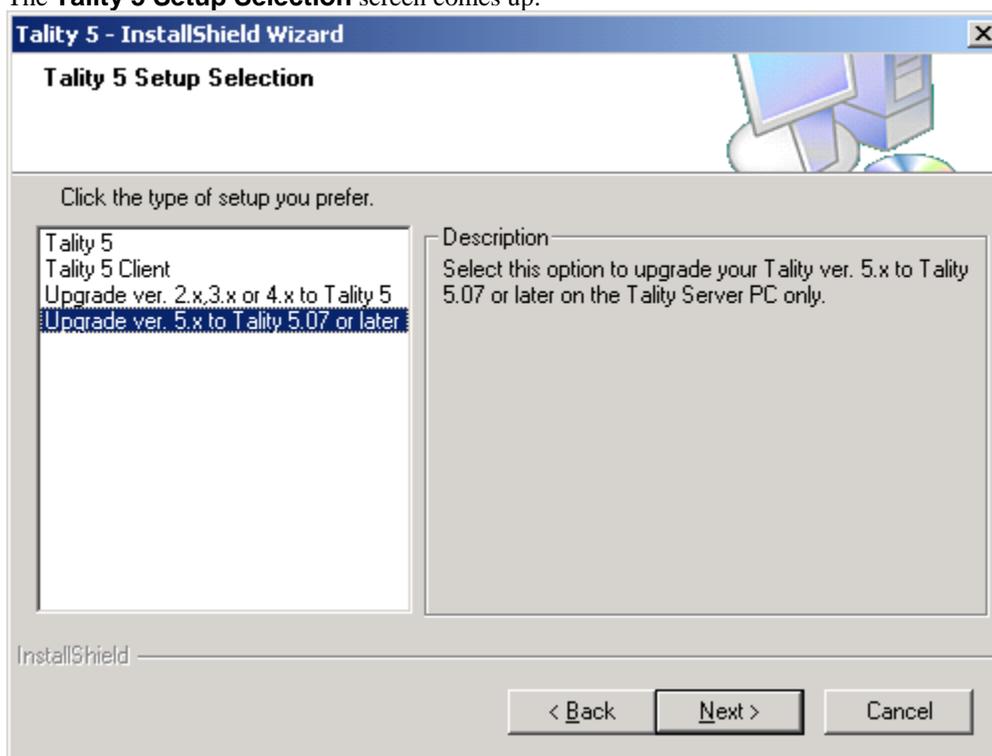
Select **Upgrade ver. 5.x to Tality 5.07 or later**.
The installation program will upgrade old version of Tality Server. Calls will be collected and processed on this PC.
Click on the **Next** button to continue.
NOTE: The Tality Sever PC needs to go through registration after Tality has been upgraded. To register your software go to www.trisys.com, option Register. If not registered the software will stop working in 30 days.

4. Click on **Next** on the **Choose Destination Location** screen.
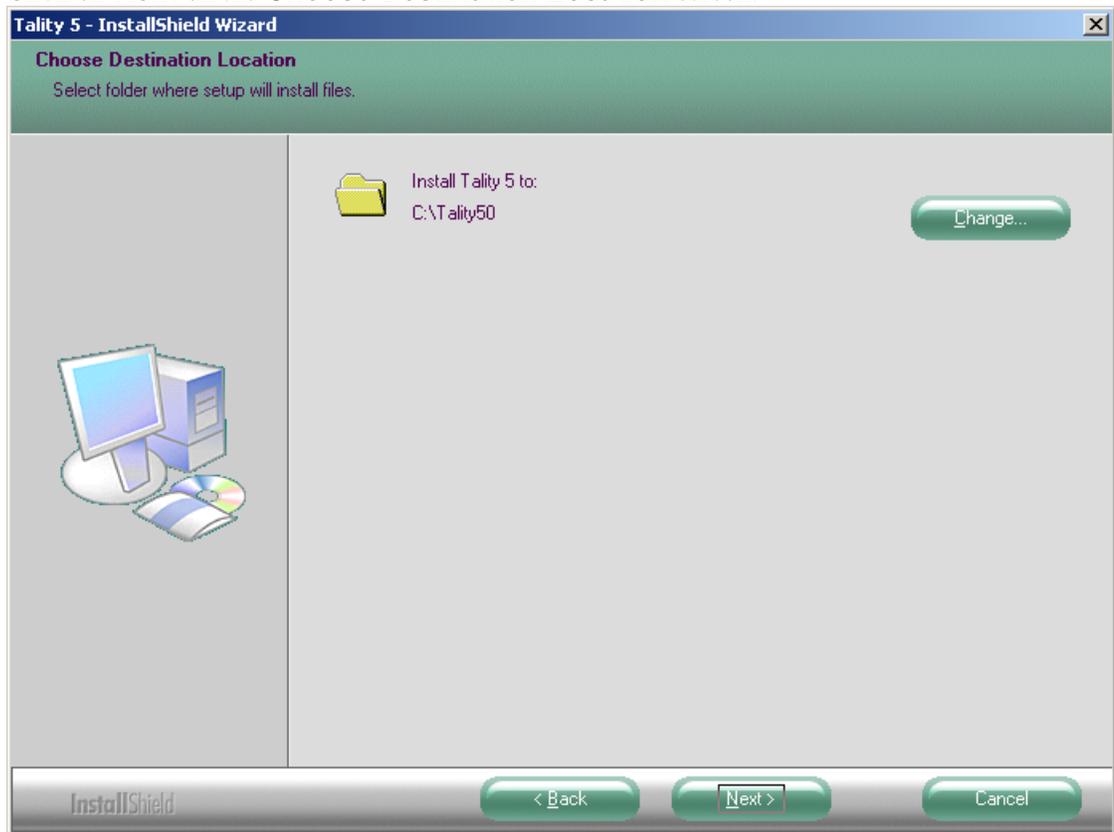
5. The **Ready to Install the Program** screen appears. Click on **Install**.
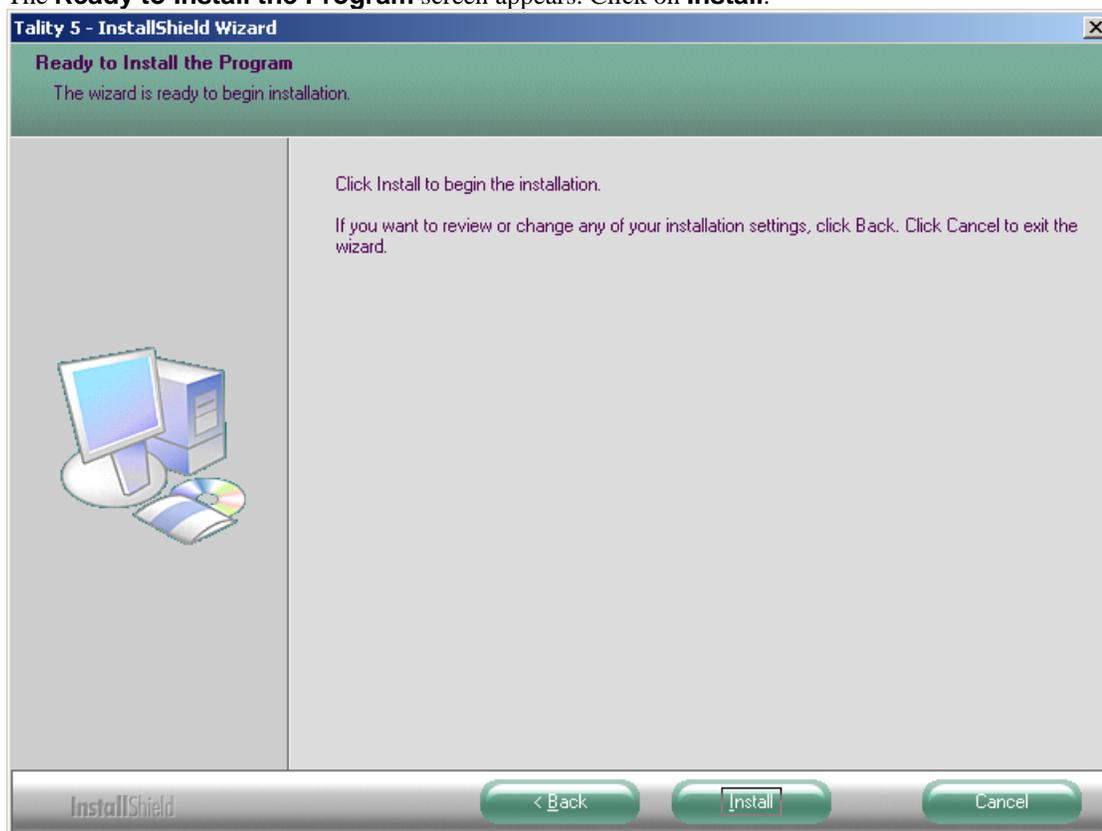
6. Program installs TALITY files and updates your system.
   Installation program displays a message asking if your TALITY software has a serial number. If you have a serial number click on **YES**, otherwise click on **NO** and TALITY will be installed as a trial version.

7. If you have a serial number, **Enter Serial Number** screen appears. Enter your software's serial number.
   Click on **OK**.

8. When installation is completed the setup program displays a screen with the **InstallShield Wizard Complete** message.
   Click on **Finish**.

9. Open the Tality application. Tality main screen displays **Upgrading Tality** message.
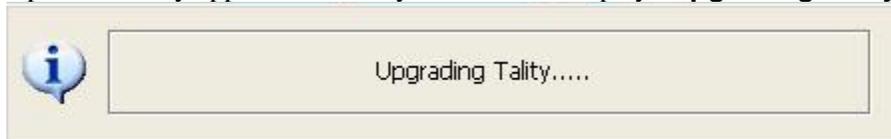
Depending on the size of the old Tality database and on the PC capabilities the **Upgrading** process may take several minutes. When done the **Optimize Progress** bar appears.
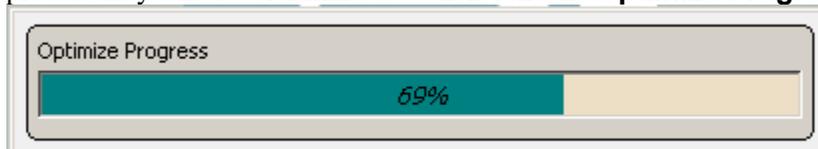
NOTE: please DO NOT INTERRUPT Upgrading and Optimizing Processes.

10. The following message is displayed when the optimize operation is finished.
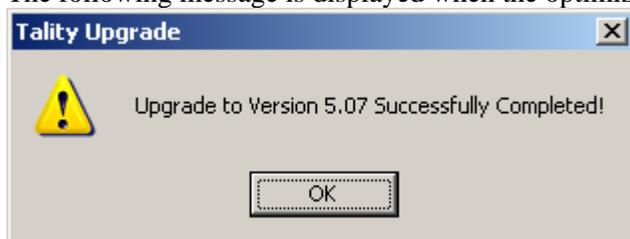
Click on **OK**.
11. Click on **Exit** to close the Tality application.
12. It is recommended to restart the computer.

Upgrading TALITY ver. 2.x, 3.x, 4.x

Follow the instructions below only if you have Tality 2.x, 3.x or 4.x and you would like to upgrade to Tality 5.

NOTE: Please make sure the old TALITY application and the SMDR Monitor are CLOSED before proceeding.

1. Insert **Tality** CD into the CD ROM drive. **Tality 5 -** the **InstallShield Wizard** screen appears. Click on the **Next** button.

2. The **License Agreement** screen comes up. Click on the **I accept the terms of the license agreement** option to check it. Click on **Next**.

3. The **Tality 5 Setup Selection** screen comes up.
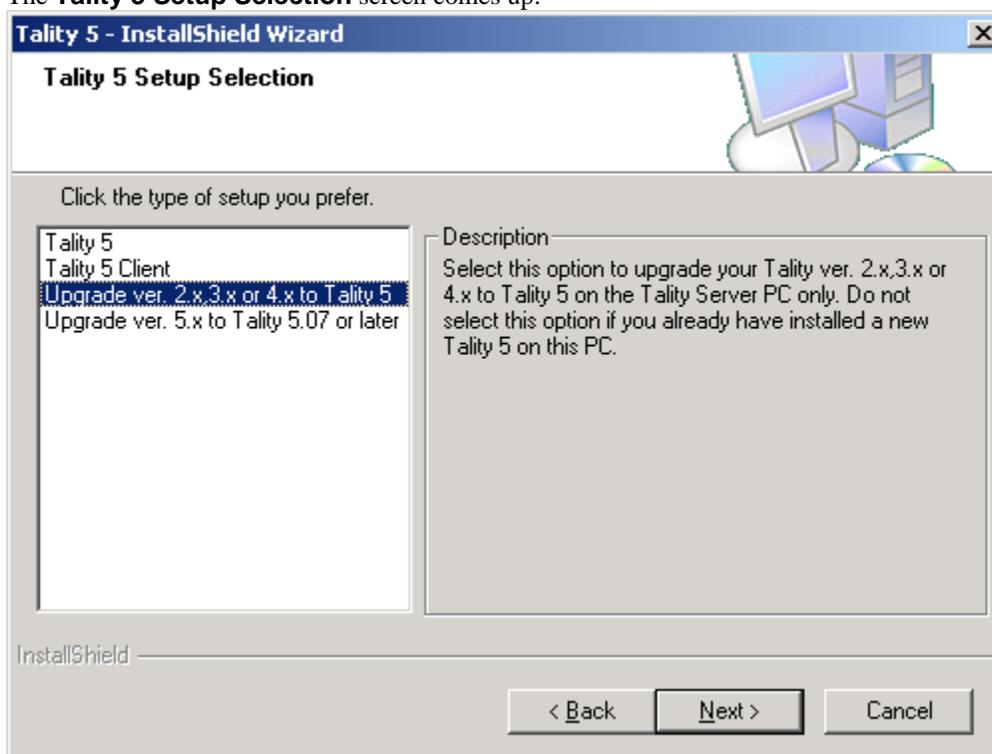
Select **Upgrade ver. 2.x, 3.x or 4.x to Tality 5**.
Do not select this option if you already have installed a new TALITY 5 on this PC.
The installation program will upgrade old version of Tality Server (ver. 2, 3 or 4) to Tality 5 Server. Calls

will be collected and processed on this PC.
Click on the **Next** button to continue.
NOTE: The Tality Sever PC needs to go through registration after Tality has been installed and running. To register your software go to www.trisys.com, option Register. If not registered the software will stop working in 30 days.

4. The **Select old Tality folder** screen comes up.
Enter the path to the folder with old version of Tality Server into the **Path** field, or find it using the **Directories** tree. This folder must be shared appropriately in order for Tality 5 installation to write to it and to rename it.
Click on **OK**.

5. The **Choose Destination Location** screen is brought up.
Accept the default installation folder or click on the **Change...** button to change a destination drive or folder.
Click on the **Next** button.

6. The **Ready to Install the Program** screen appears. Click on **Install**.

7. The following message comes up.

Click on **YES**.

8. Program installs TALITY files and updates your system.
Installation 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.

9. If you have a serial number, **Enter Serial Number** screen appears. Enter your software's serial number.
   Click on **OK**.

10. Tality installation program needs to run Tality application to complete upgrade procedure. Click on **YES** to the following message.
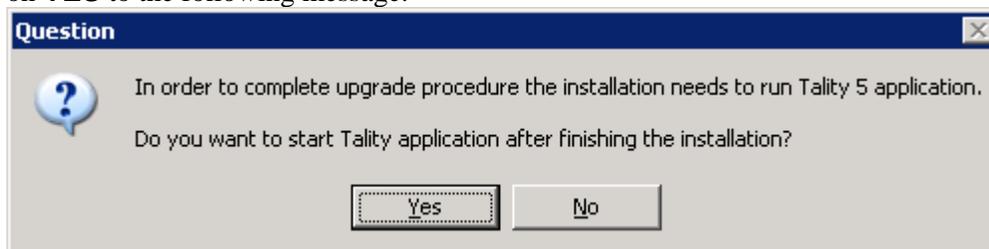
11. When installation is completed the setup program displays a screen with the **InstallShield Wizard Complete** message.
    Click on **Finish**.

12. The Tality application opens and displays **Upgrading Tality** message.

Depending on the size of the old Tality database and on the PC capabilities the **Upgrading** process may take several minutes. When done the **Optimize Progress** bar appears.
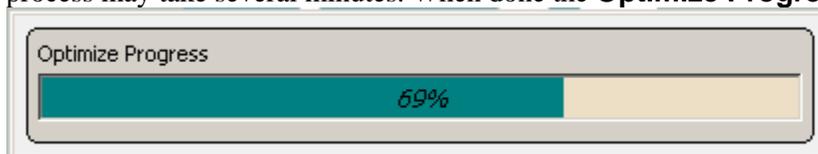
NOTE: please DO NOT INTERRUPT Upgrading and Optimizing Processes.

13. The following message is displayed when the optimize operation is finished.
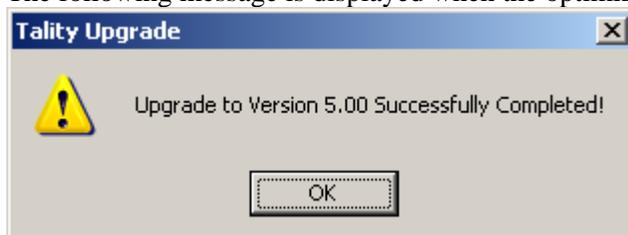
Click on **OK**.

14. Click on **Exit** to close the Tality application.

15. 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 Register).

Guest/User

Guest/User Overview

There are two tenant categories: **Guests** and **Users** (employees). TALITY creates a record for a newly checked-in tenant automatically as soon as the phone activity starts from the room assigned to this individual. The program assumes the tenant is **Guest** and assigns him a name composed in the following manner - "Room *extension number*" (for example "Room 214"). Call records for this tenant are registered from that time on and he is billed according to the set rates. By using **Guest/User** tools you can add and modify **Guests** and **Users** (employees).

Add Guest/User

1. Click on the **Add Guest/User** toolbar icon.
   Alternately, click on **Guest/User → Add Guest/User** on the main menu.

The **Add Guest/User** screen appears.

2. Type the following information in the corresponding text boxes: **Last Name**, **First Name**, **Middle Initial.**

3. Select a room number from the **Room** list. If the desired room number is not there add it to the list by clicking on the plus [+] icon.

Type the new room number in the provided text box and click on **OK**.

You can also modify the room number by clicking on the pencil ![pencil] icon and typing a new value to replace the selected room number.

![Change Room dialog showing Room: 732 with OK and Close buttons]
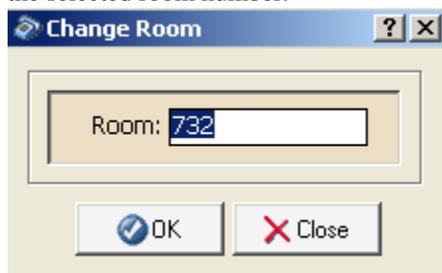
Click on **OK** to save changes.

4. Add extensions to the **Extensions** list by clicking on the plus ![plus] icon and typing in the desired extension number. To change any of the already listed extensions select one of them and click on the pencil ![pencil] icon. Type in the new value and click on **OK**. To delete the existing extension click on it to select it and click on the scissors ![scissors] icon.

5. If a person is a guest, check the **Guest** option and fill in the time and the date of registration.
    If a person is an employee, check the **User** option and click on the down arrow of the **Department** list to bring up department ID selection. Choose the department ID corresponding to the **User**. If the **User's** department ID is not on the list, add a department using the **Department** screen.
    How to use the Department Screen

6. If a person has an authorization code, enter it in the **Authorization Code** field.

7. If surcharges, defined via **Surcharge** screen, apply to this guest/user account check the **Apply Surcharge** box.

8. Check **Always Store Authorization Code With Call** option if you would like to store the authorization code with a call record, in case it has been used to make a phone call.

9. In case there is a credit limit for this guest/user enter the maximum credit dollar amount into the **Credit Limit** text box.

10. If you would like to apply recurring charges to this guest/user click on the **Recurring Charges** button.
    The screen with the list of the available recurring charges appears.
    To apply the existing recurring charge.

    a. Click on the check box corresponding to the desired recurring charge to apply it to this guest/user.

		Amount	Description	Applied	Type
▶	☑	$10.00	Phone line	Monthly	Public

    b. Click on **OK**.

    To create a new recurring charge.

    a. Click on the **New** button.

    b. Enter the recurring charge dollar value into the **Amount** field.

    c. Enter short description of the recurring charge into the **Description** field.

    d. Select an appropriate time frame from the **Applied** list.

    e. Recurring charges can be applied **Daily**, **Weekly** or **Monthly**.

f. Select **Private** or **Public** from the **Type** list.
    Private recurring charge applies only to this guest/user and is not added to the general list of the recurring charges.
    Public is added to the general list of the recurring charges and is listed as one of the choices on the **Recurring Charges** screen for any guest/user. Public recurring charge can be applied to any of the guests/users.

g. Click on **OK** to add the new charge to the list of recurring charges.

h. To edit a recurring charge

i. Select the recurring charge by clicking anywhere on its record.

j. Click on the **Edit** button.

k. The **Edit Recurring Charge** screen comes up. Modify field entries as desired.

l. Click on **OK**. The recurring charges list reflects changes.

m. To delete a recurring charge

n. Select the recurring charge by clicking anywhere on its record.

o. Click on the **Delete** button.

p. Click **OK** to the confirmation message. The deleted charge is taken off the recurring charges list.

q. **When done with setting up recurring charges** click on **OK** on the **Recurring Charges** screen to save changes.

11. If you would like to print a hardcopy of the bill for this room check the Paper Bill option under the Bill Options.

12. If you would like to email the bill to the client check the **Email Bill** option under **Bill Options**.

Bill Options:
☑ Paper Bill
☑ Email Bill

Note: Output options specified here are Billing Default Output options for this Guest/User.

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13. To enter the "sent to" email address click on the pencil icon located on the right-hand side of the **Billing Email Addresses** list.

14. The **Address Book** screen appears.

15. If you would like to use existing email address, select appropriate address book from the **Address Book** list in the upper right-hand corner of the screen.

Address Book: Billing Contacts ▼

All Contacts
Billing Contacts
Non-Billing Contacts
Room: 1025 Billing Contacts

16. Email addresses from the selected address book (in our case **Billing Contacts)** populate the screen. Select the desired email address by checking the box next to the **Last Name** field.

	Last Name	First Name	Email Address	Billing Contact		Room	Guest/User Last Name	Guest/User First Name
☐	Akerman	George	georgea@tality.com	✔		1025	Room 1025	
☐	Fleming	Michael	michaelf@tality.com	✔		1025	Perreli	David
☐	Giordano	Debbie	debbieg@tality.com	✔		1028	Room 1028	
☐	Matthews	James	jamesm@tality.com	✔		104	Room 104	
☑	Perreli	David	davidp@tality.com	✔		106	Room 106	

Contacts: 5

New
Edit
Delete

☑ All   ☐ All

To.. ▶ "David Perreli"<davidp@tality.com>
Cc.. ▶
Bcc.. ▶

OK   Close

17. Click on the **To** button, located on the bottom of the screen, to transfer the selected email address to the adjacent text box. The bill will be sent to this email address when generated.

"David Perreli"<davidp@tality.com>

To.. ▶

Cc.. ▶

Bcc.. ▶

You can populate the **Cc** and **Bcc** fields the same way. You can also type email addresses directly into the **To**, **Cc**, and **Bcc** fields.

18. Click on **OK**.

19. The **Address Book** screen closes and the **Billing Email Address** field contains selected email addresses.

Billing Email Addresses:

Bill Options:

☑ Paper Bill

☑ Email Bill

"David Perreli"<davidp@tality.com>

Unbilled Call Charges: $6.05 Last Billed: / / Billing

20. The bottom of the screen displays **Unbilled Call Charges** information and the **Last Billed** date.

21. Click on **OK** on the **Add Guest/User** screen to save changes.

Change Guest/User Information

1. Click on the **Change Guest/User** toolbar icon.
   Alternately, click on **Guest/User → Change Guest/User Information** on the main menu.
   A list of guests/users appears on the screen.

You can set the list to view only **Guest**, only **Users** (employees), or both by checking appropriate **Show** check boxes on the bottom of the screen.

The list can also be sorted by clicking on any of the column headers. The current sort column is marked with the appropriate sort order icon: **AZ** for ascending or **ZA** for descending.

i.e.

To change the sort order from ascending to descending and vice versa click on the sort icon in the right hand corner of the screen and sort the list of guests/users by clicking on one of the column headers.

2. Bring up guest/user record by selecting the guest/user from the list and clicking on **OK**. Alternately, you can double click on the guest/user.

The **Change Guest/User** screen appears.

3. To change **Last Name**, **First Name** and **Middle Initial** fields type the new information in the corresponding text boxes.

4. To change the room number, select a new value from the **Room** list. If the desired room number is not there add it to the list by clicking on the plus icon.

Type the new room number in the provided text box and click on **OK**.

You can also modify the existing room number by clicking on the pencil ![pencil icon] icon and typing a new value to replace the existing room number.
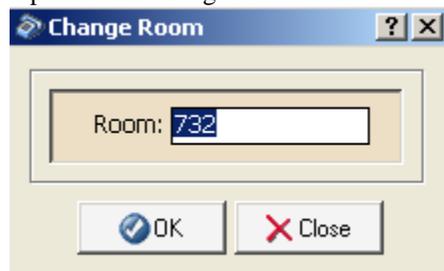
Click on **OK**.

5. To add a new extension to the **Extensions** list click on the plus ![plus icon] icon and type in the desired extension number into the **Add Extension** dialog box. Click on **OK**.

   To change any of the already listed extensions select one of them and click on the pencil ![pencil icon] icon. Type in a new value into the **Add Extension** dialog box and click on **OK**. To delete the existing extension, select it and click on the scissors ![scissors icon] icon.

6. To change guest/user status:
   If a person is a guest, check the **Guest** option and fill in the time and the date and time of registration.
   If a person is an employee, check the **User** option and click on the down arrow of the **Department** list to bring up department ID selection. Choose the department ID corresponding to the **User**. If the **User's** department ID is not on the list, add a department using the **Department** screen.
   How to use the Department Screen

7. If a person has an authorization code, enter it in the **Authorization Code** field.

8. If surcharges, defined via **Surcharge** screen, apply to this guest/user account check the **Apply Surcharge** box.

9. Check **Always Store Authorization Code With Call** option if you would like to store the authorization code with a call record, in case it has been used to make a phone call.

10. In case there is a credit limit for this guest/user enter the maximum credit dollar amount into the **Credit Limit** text box.

11. If you would like to apply recurring charges to this guest/user click on the **Recurring Charges** button.
    The screen with the list of the available recurring charges appears.
    To apply the existing recurring charge.

    a. Click on the check box corresponding to the desired recurring charge to apply it to this guest/user.

		Amount	Description	Applied	Type
▶	☑	$10.00	Phone line	Monthly	Public

    b. Click on OK.

    To create a new recurring charge.

    a. Click on the **New** button.

    b. Enter the recurring charge dollar value into the **Amount** field.

    c. Enter short description of the recurring charge into the **Description** field.

    d. Select an appropriate time frame from the **Applied** list.

e. Recurring charges can be applied **Daily**, **Weekly** or **Monthly**.

f. Select **Private** or **Public** from the **Type** list.
   Private recurring charge applies only to this guest/user and is not added to the general list of the recurring charges.
   Public is added to the general list of the recurring charges and is listed as one of the choices on the **Recurring Charges** screen for any guest/user. Public recurring charge can be applied to any of the guests/users.

g. Click on **OK** to add the new charge to the list of recurring charges.

h. To edit a recurring charge

i. Select the recurring charge by clicking anywhere on its record.

j. Click on the **Edit** button.

k. The **Edit Recurring Charge** screen comes up. Modify field entries as desired.

l. Click on **OK**. The recurring charges list reflects changes.

m. To delete a recurring charge

n. Select the recurring charge by clicking anywhere on its record.

o. Click on the **Delete** button.

p. Click **OK** to the confirmation message. The deleted charge is taken off the recurring charges list.

q. **When done with setting up recurring charges** click on **OK** on the **Recurring Charges** screen to save changes.

12. If you would like to print a hardcopy of the bill for this room check the Paper Bill option under the Bill Options.

13. If you would like to email the bill to the client check the **Email Bill** option under **Bill Options**.

Bill Options:
☑ Paper Bill
☑ Email Bill

Note: Output options specified here are Billing Default Output options for this Guest/User.

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14. To enter the "sent to" email address click on the pencil icon located on the right-hand side of the **Billing Email Addresses** list.

15. The **Address Book** screen appears.

16. If you would like to use existing email address, select appropriate address book from the **Address Book** list in the upper right-hand corner of the screen.

Address Book: Billing Contacts

All Contacts
Billing Contacts
Non-Billing Contacts
Room: 1025 Billing Contacts

17. Email addresses from the selected address book (in our case **Billing Contacts)** populate the screen. Select the desired email address by checking the box next to the **Last Name** field.

✓	Last Name	First Name	Email Address	Billing Contact		Room	Guest/User Last Name	Guest/User First Name
☐	Akerman	George	georgea@tality.com	✓		1025	Room 1025	
☐	Fleming	Michael	michaelf@tality.com	✓		1025	Perreli	David
☐	Giordano	Debbie	debbieg@tality.com	✓		1028	Room 1028	
☐	Matthews	James	jamesm@tality.com	✓		104	Room 104	
☑	Perreli	David	davidp@tality.com	✓		106	Room 106	

Contacts: 5

☑ All   ☐ All

To.. ▶   "David Perreli"<davidp@tality.com>
Cc.. ▶
Bcc.. ▶

● OK   ✕ Close

18. Click on the **To** button, located on the bottom of the screen, to transfer the selected email address to the adjacent text box. The bill will be sent to this email address when generated.

You can populate the **Cc** and **Bcc** fields the same way. You can also type email addresses directly into the **To**, **Cc**, and **Bcc** fields.

19. Click on **OK**.

20. The **Address Book** screen closes and the **Billing Email Address** field contains selected email addresses.

21. The **Address Book** screen closes and the **Billing Email Address** field contains selected email addresses.

22. The bottom of the screen displays **Unbilled Call Charges** information and the **Last Billed** date.

23. Click on **OK** on the **Add Guest/User** screen to save changes.

Billing

1. Click on the **Change Guest/User** toolbar icon.
   Alternately, click on **Guest/User → Change Guest/User Information** on the main menu.
   A list of guests/users appears on the screen.
   You can set the list to view only **Guest**, only **Users** (employees), or both by checking appropriate **Show** check boxes on the bottom of the screen.
   The list can also be sorted by clicking on any of the column headers. The current sort column is marked with the appropriate sort order icon: **AZ** for ascending, or **ZA** for descending.
   i.e.

To change the sort order from ascending to descending and vice versa click on the sort icon in the right hand corner of the screen and sort the list of guests/users by clicking on one of the column headers.

2. Bring up guest/user record by selecting the guest/user from the list and clicking on **OK**. Alternately, you can double click on the guest/user.
   The **Change Guest/User** screen appears.

3. Click on the **Billing** button located on the bottom part of the screen.

Current Bill

1. Select the **Current Bill** option from the **Bill** list, to generate a bill for the unbilled activity for this guest/user.

2. Select **Detail** or **Summary** from the report **Type** list.

3. Select the desired output type. Your choices are: Printer, Preview, Email, File (PDF), and Billing Default Output.

   Select **Printer** to print the bill.

   Select **Preview** to view the bill on the screen.

   Select **Email** to email the bill.
   Click on the pencil icon next to the **Email To** list to enter the recipients' email address.
   The **Create Email** screen appears. Type email address into the **To** field. Alternately, you can click on the **Address Book** icon in the left-hand corner and select an existing email address. Fill in the **Subject** field and the email body text. Click on **OK**

4. Select **File (PDF)** to save the bill as a PDF file.

Bill:	Current Bill
Type:	Detail
Output:	File (PDF)
Email To:	agnesl@trisys.com
File:	C:\TALITY50\BILL.PDF

    When **File (PDF)** option is selected the **File** field becomes enabled. Enter the path to the PDF file or browse for it using the hand icon adjacent to the **File** text box.

5. Select **Billing Default Output** to use options specified for this Guest\Client via the **Guest\Client** screen. Depending on what has been selected for this Guest\Client the bill can be printed (Paper Bill option), or emailed (Email Bill option), or both.

6. Choose **All Unbilled** from the **Select Calls** list to include all activity that has not been billed yet. Select **Date Range** if you want to enter the **From** and **To** billing dates, or choose one of the predefined time frames.

Select Calls:	Date Range
	All Unbilled
	Today
	Yesterday
	Week To Date
	Month To Date
	Previous Month
	Date Range

7. If you would like every other row of the report highlighted for greater readability check the **Highlight Alternating Report Rows** check box.

8. If you would like to remove guest/user information after he is billed check the **Remove Guest/User After Billing** check box.

9. Click on **OK** to generate a bill. The message "Processing billing" will pop on the screen. If there is no records for this user the program will inform you with the appropriate message. Otherwise, the billing report will be printed and the call records will be archived. The archived data will not be available for billing, but you will be able to print reports based on it.

10. If you are running a report in the **Preview** mode, once generated, the report screen displays a side menu.

    Page 1 of 12 → Displays the current page number and the total page count

    |◄ ◄ ► ►| → Click on the arrows to navigate through pages

    Go to page → Use the **Go to page** button to go to a specific page

    Whole Page → This list contains view options. **Whole Page** – display one whole page in its entirety, **65%** - displays report page/s 65 % of original size, **100%** - displays report page/s 100% of original size

    → Select between one or two page view (two page view is not available when **Whole Page** is selected)

→**Close and Print** closes the report and displays the print screen

→ **Reset** – brings up the filter screen and allows for changing filter criteria and running this report again

→ **Close** – closes the report screen

Billing History

Billing History is used to view and reprint previously printed bills.

Billing History comes in handy when a bill for a guest/user needs to be reprinted. For example: in the event the printer goes down in the middle of print job, a user can reprint the bill using **Billing History**.

Note: call records purged from Tality via **Auto Archive** are no longer available to the **Billing History** report.

Billing History can also be accessed via the **Reports** screen. When accessed via **Reports** screen **Billing History** allows you to reprint all available bills. On the other hand, **Billing History** accessed via **Billing** from the **Guest/User** screen, is restricted to the guest/user currently displayed on the **Guest/User** screen.

1. Click on the **Billing History** option button.

2. Depending on if you want to view or print the report select **Preview** or **Printer** from the **Output** list.

3. Indicate the report type by selecting **Detail** or **Summary** from the **Type** list.

4. If you would like every other row of the report highlighted for greater readability check the **Highlight Alternating Report Rows** check box.

5. Click on **OK**. The **Select Billing History Records** screen appears.
   The list can be sorted by clicking on any of the column headers. The current sort column is marked with the appropriate sort order icon: **AZ** for ascending or **ZA** for descending.

   To change the sort order from ascending to descending and vice versa click on the sort icon in the right hand corner of the screen and sort the list of billing records by clicking on one of the column headers.

6. All records pertain to the guest/user displayed on the **Change Guest/User** screen. Each record stands for a bill printed for this guest/user in the past. The first cell of each record contains a check box. To select bills for printing click on the boxes corresponding to them.
To select all bills click on the **All** button with **an icon of a check mark** located in the lower left-hand corner of the screen. To deselect all billing records click on the **All** button with **an icon of an empty square**.

7. Click on **Next**.

8. Depending on which **Output** option has been selected at the beginning, the bill is either printed or it appears in a preview window.

9. If you are running a report in the **Preview** mode, once generated, the report screen displays a side menu.

Page 1 of 12   → Displays the current page number and the total page count

⏮ ◀ ▶ ⏭   → Click on the arrows to navigate through pages

Go to page   → Use the **Go to page** button to go to a specific page

Whole Page ▼   → This list contains view options. **Whole Page** – display one whole page in its entirety, **65%** - displays report page/s 65 % of original size, **100%** - displays report page/s 100% of original size

▢ ▢▢   → Select between one or two page view (two page view is not available when **Whole Page** is selected)

Print 🖨   → **Print** the report

Print Page 🖨   → **Print Page** - print the currently viewed page only

Reset 🔍   → **Reset** – brings up the filter screen and allows for changing filter criteria and running this report again

Close 🚪   → **Close** – closes the report screen

Delete Guest/User

1. Click on the **Change Guest/User** [toolbar icon] toolbar icon.
Alternately, click on **Guest/User → Change Guest/User Information** on the main menu.
A list of guests/users appears on the screen.

You can set the list to view only **Guest**, only **Users** (employees), or both by checking appropriate **Show** check boxes on the bottom of the screen.

The list can also be sorted by clicking on any of the column headers. The current sort column is marked with the appropriate sort order icon: **AZ** for ascending or **ZA** for descending.

i.e.

To change the sort order from ascending to descending and vice versa click on the sort icon in the right hand corner of the screen and sort the list of guests/users by clicking on one of the column headers.

2. Bring up guest/user record by selecting the guest/user from the list and clicking on **OK**. Alternately, you can double click on the guest/user.

The **Change Guest/User** screen appears.

3. Click on the **Delete** button. Click on **OK** to the confirmation message.

Departments

To Open the Departments screen

1. Click on the **Add Guest/User** toolbar icon.
    Alternately, click on **Guest/User → Add Guest/User** on the main menu. The **Add Guest/User** screen appears.

2. Check the **User** option button. The **Edit Department List** button [pencil icon] is located next to the **Department** list and is now enabled. Click on it to open the **Department** screen.

To add a department

1. Click on the **Add Guest/User** [toolbar icon] toolbar icon.
    Alternately, click on **Guest/User → Add Guest/User** on the main menu. The **Add Guest/User** screen appears.

2. Check the **User** option button. The **Edit Department List** button [pencil icon] is located next to the **Department** list and is now enabled. Click on it to open the **Department** screen.

3. Click on the **New** button.

4. Enter description for the new department. Click on **OK**.

5. Click on **OK** to save changes and exit the **Department** screen.

To edit a department

1. Click on the **Add Guest/User** [toolbar icon] toolbar icon.
    Alternately, click on **Guest/User → Add Guest/User** on the main menu. The **Add Guest/User** screen appears.

2. Check the **User** option button. The **Edit Department List** button [pencil icon] is located next to the **Department** list and is now enabled. Click on it to open the **Department** screen.

3. The **Department** screen contains a list of all existing departments. Select the desired department and click on **Edit**.

4. Overwrite the existing description with a new one. Click on **OK**.

5. Click on **OK** to save changes and exit the **Department** screen.

To delete a department

1. Click on the **Add Guest/User** toolbar icon.
    Alternately, click on **Guest/User → Add Guest/User** on the main menu. The **Add Guest/User** screen appears.

2. Check the **User** option button. The **Edit Department List** button is located next to the **Department** list and is now enabled. Click on it to open the **Department** screen.

3. The **Department** screen contains a list of all existing departments. Select the desired department and click on **Delete**.

4. The department's description is removed form the **Department** list.

5. Click on **OK** to save changes and exit the **Department** screen.

Reports

To generate a report

TALITY Reports can be created in the following output formats:

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

*   **Printer** –the report is printed to a printer or to a file.

*   **Email** – the report is emailed to the specified email address.

1. Click on the Reports toolbar icon.
    Alternately, click on Reports → Reports on the main menu.
    The Tality Reports screen comes up.

The Tality Reports screen comes up.
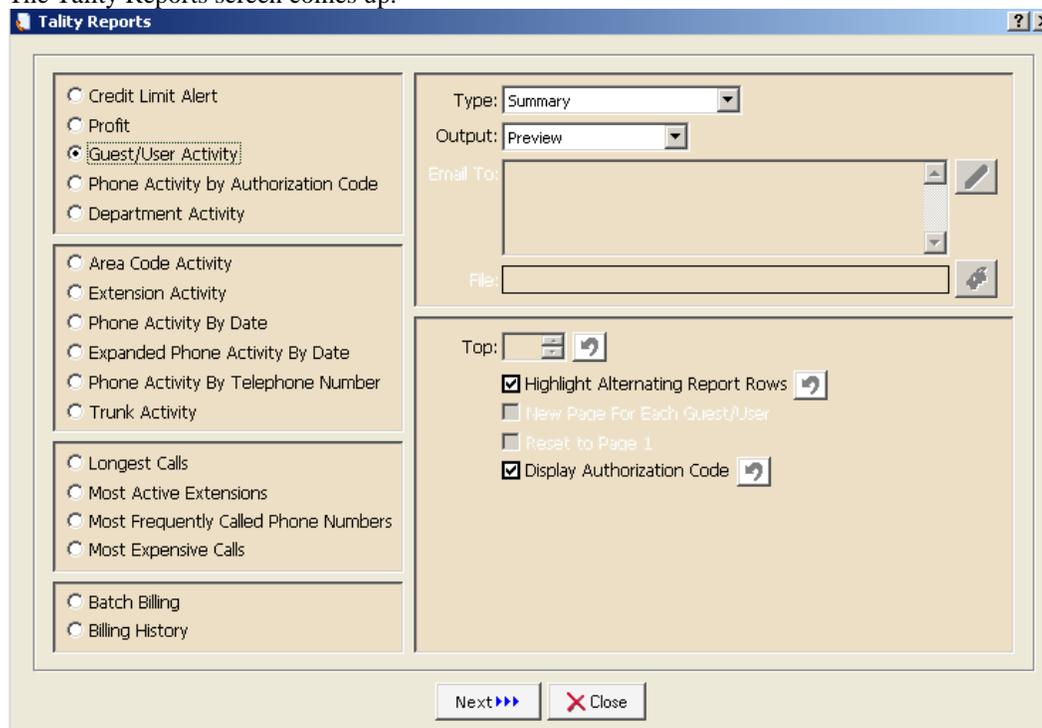
2. The names of the available reports are displayed in the left hand side panel.
   Click on the option button corresponding to the desired report to select it.

3. Select **Detail** or **Summary** from the report **Type** list.
   Select the desired output type. Your choices are: Printer, Preview, Email, and File (PDF).
   In case of Batch Billing or Billing History reports there is one more option available - Billing Default Output.

   Select **Printer** to print the report.

   Select **Preview** to view the report on the screen.

   Select **Email** to email the report.
   Click on the pencil icon next to the **Email To** list to enter the recipients' email address.
   The **Create Email** screen appears. Type email address into the **To** field. Alternately, you can click on the
   Address Book icon in the left-hand corner and select an existing email address. Fill in the **Subject** field and
   the email body text. Click on **OK**.

   Select **File (PDF)** to save the report as a PDF file.
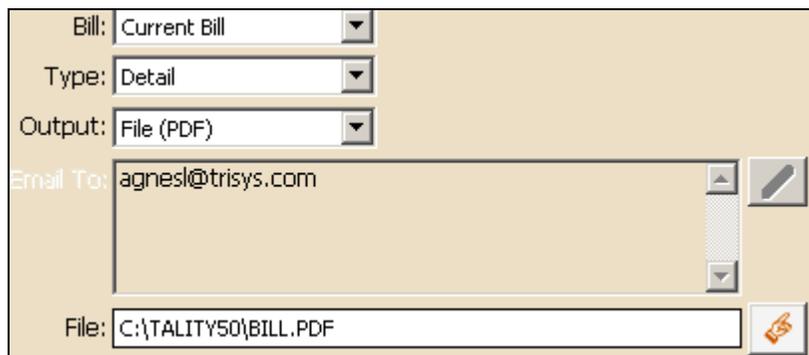
When **File (PDF)** option is selected the **File** field becomes enabled. Enter the path to the PDF file or browse for it using the hand icon adjacent to the **File** text box.

Select **Billing Default Output** to use options specified for this Guest\Client via the **Guest\Client** screen. Depending on what has been selected for this Guest\Client the report can be printed (Paper Bill option), or emailed (Email Bill option), or both.
Billing Default Output option is available only for Batch Billing and Billing History reports.

4. Longest Calls, Most Active Extensions, Most Frequently Called Phone Numbers and Most Expensive Calls reports have an option to report on a specified number of records counting down from the top.

Top: [20]

5. Some of the detail reports can be printed with each new report group starting on a new page. For example, detail report **Phone Activity by Authorization Code** can be printed starting different Authorization Code detail information with a new page.

☑ New Page For Each Authorization Code
☑ Reset to Page 1

In our example we also checked **Reset to Page 1** option. That way each new **Authorization Code** will start a new section of a report with a new page and that page number will be 1(page numbers will restart for each new section).

6. Click on **Next** to continue. The report filter screen appears.
How to use report filter

How to use report filter

1. The report filter screen is used throughout Tality for any screens that require search criteria (Reports, Call Editor, Archive and Report Scheduler). This section describes how to use this screen when you are running a report. However, you can use it in the same way no matter what task you are performing.
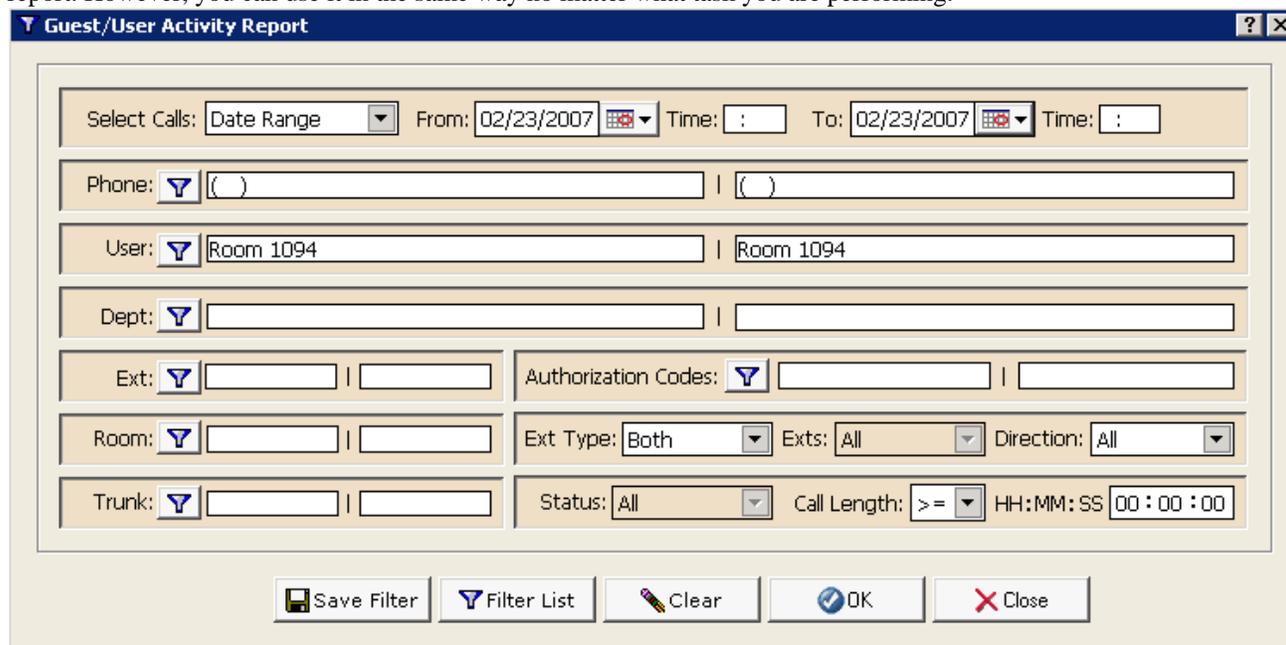
2. If you have a predefined filter you would like to use, click on the **Filter List** button [Filter List]. Select the desired filter and either double click on it, or click on **OK**. Notice the changes on the filter screen. Verify all criteria are correct and click on **OK**.

If you are running one of the Tality reports via this filter screen then depending on the settings in the **Output** field (selected on the previous screen) a report will be either printed, or it will show up on a screen.

3. In case you do not have a predefined filter you need to enter search criteria manually.
    Pull down the **Select Calls** list by clicking on the down arrow and choose the appropriate time period for your report. If you would like to enter the dates yourself select **Date Range** from the list. This will activate **From** and **To** fields and enable you to fill in the dates.

4. To enter filter criteria for **Phone**, **User**, **Dept**, **Ext**, **Authorization Codes**, **Room**, or **Trunk** click on the filter button ![filter icon] corresponding to the desired field. The appropriate selection screen appears.
    I.e. clicking on the filter button associated with **Users** field brings up the **Users** selection screen.
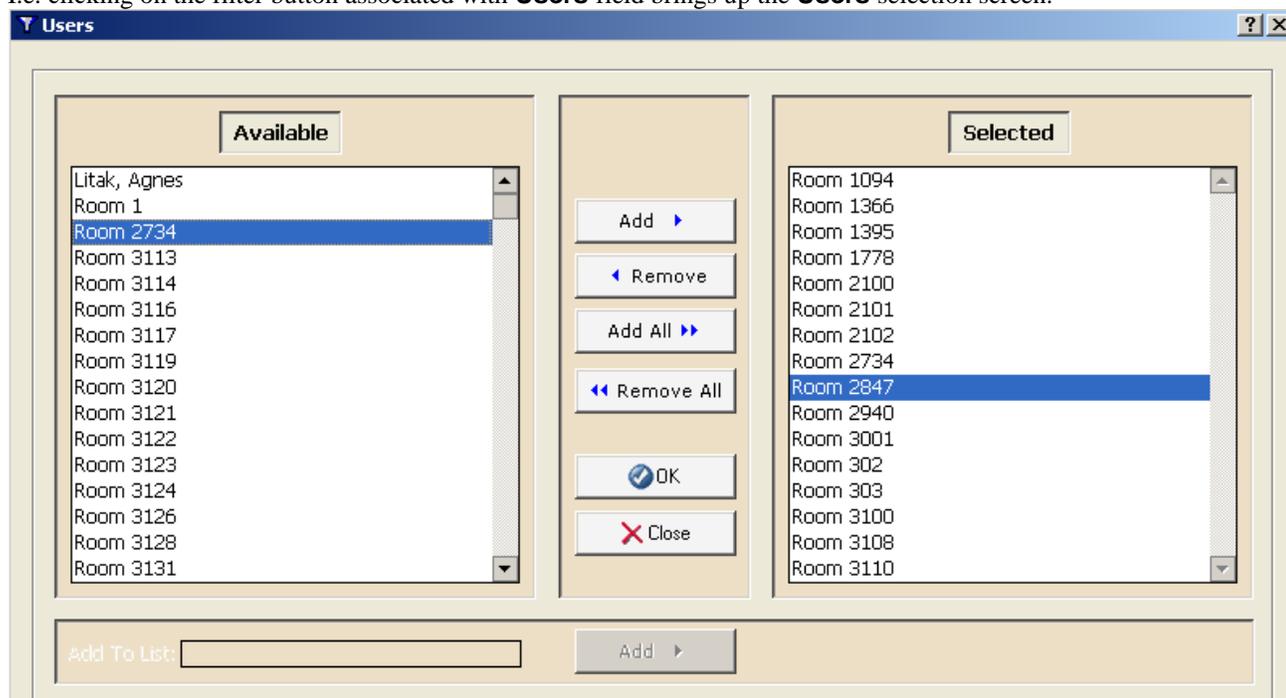
1. To add users to the filter criteria you need to transfer user names from the **Available** list to the **Selected** list. You can accomplish this by selecting a user name on the **Available** list and clicking on the **Add** button. The selected user name moves to the **Selected** list. Clicking on **Add All** moves all user names from the **Available** list to the **Selected** list.

2. To remove user name form the **Selected** list, highlight the user name and click on the **Remove** button. You can also remove all user names by clicking on **Remove All**. In some cases, i.e. **Phone** selection screen, the **Add To List** entry is available (bottom of the screen). If you need to add a phone number that is not on the **Available** list you can do it using the **Add To List** field. Enter the phone number into the **Add To List** filed and click on the **Add** button next to it. The phone number is added to the **Selected** list.

3. When you are done with your selection click on **OK**. Selection screen closes and the **Filter** screen reflects new criteria.

5. Select the direction (**Incoming**, **Outgoing**, **Both**) of calls you want to include in the report by choosing appropriate item form the **Direction** pull down list.

6. Select the appropriate type of extensions included in the report from the **Ext Type** list. Extension type is determined by whom it belongs to. If this is an extension assigned to a user then it is **User Extension**.

Both ▼
Both
Guest Extensions
User Extensions
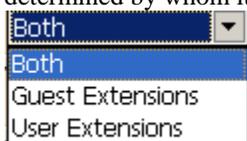
7. If call duration is one of the criteria you would like to use specify it accordingly using **the Call Length** field.

    Call Length: [>= ▼] HH:MM:SS [00:00:30]

    According to the above example the report will include all calls with the duration equal to or greater than 30 seconds.

8. Once you have entered report criteria you can save them as a filter for future use by clicking on the **Save Filter** button [💾 Save Filter]. The **Save Filter** screen comes up. Enter the name for this filter and click on **OK**. The filter is saved.

9. **If you are scheduling a report via this filter screen**:

    [Back ◀◀◀]   [Finished ▶▶▶]

    Click on the **Finished** button to schedule this report..

    Otherwise, click on the **OK** button to run the report. If there are no records found for the specified criteria you will be notified with the message "No Matching Records Found". Otherwise, TALITY proceeds with generating of the report.

    However, if you'd like to start over, click on the **Clear** button [✎ Clear]. All criteria are erased from the filter screen.

10. If you are running a report in the **Preview** mode, once generated, the report screen displays a side menu.

    [Page 1 of 12]   → Displays the current page number and the total page count

    [◀| ◀ ▶ ▶|]   → Click on the arrows to navigate through pages

    [🗐 Go to page]   → Use the **Go to page** button to go to a specific page

    [Whole Page ▼]   → This list contains view options. **Whole Page** – display one whole page in its entirety, **65%** - displays report page/s 65 % of original size, **100%** - displays report page/s 100% of original size

    [🗐 🗐]   → Select between one or two page view (two page view is not available when **Whole Page** is selected)

    [🖨 Close and Print]   → **Close and Print** closes the report preview window and brings up the print screen

    [🔍 Reset]   → **Reset** – brings up the filter screen and allows for changing filter criteria and running this report again

Predefined Filters

Filter List

Filter List is a list of all existing predefined filters.

- To create a predefined filter, enter report criteria into a filter screen and save them using the **Save Filter** button. Click on **OK** to the confirmation message.

- To delete a predefined filter, click on the **Filter List** button located on the reports filter screen. Select a filter name to delete and click on the **Delete** button. Click on **OK** to the confirmation message.

- To run report based on the predefined filter click on the **Filter List** button. Select the desired filter and either double click on it, or click on **OK**. Notice the changes on the filter screen. Check if all the criteria are correct and click on **OK**.

Credit Limit Alert Report

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

Profit Report

This report provides management with profit information

Guest/User Activity Report

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

Phone Activity by Authorization Code Report

This report lists detailed call activity in authorization code sequence.

Department Activity Report

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

Area Code Activity Report

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

Extension Activity Report

The **Extension Activity** report lists each call made by extension.

Phone Activity by Date Report

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

Expanded Phone Activity by Date Report

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

Phone Activity by Telephone Number Report

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

Trunk Activity Report

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

20 Longest Calls Report

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

20 Most Active Extensions Report

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 Report

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 Report

This report provides detailed information about the twenty most expensive calls

Batch Billing

Simplified and accurate billing is among many features that make TALITY an ideal product for long-term tenant establishments. The program offers batch billing for all guests/users which makes it a less time consuming and less error prone process. The billing screen is designed to generate report giving specific parameters. It enables you to choose User, Department, and the period for the billing report you want to run.

Billing History

Billing History is used to view and reprint previously printed bills.

Billing History comes in handy when a particular bill or multiple bills need to be reprinted. For example: in the event the printer goes down in the middle of Batch Billing print job and some of the bills do not print, a user can print the missing bills using Billing History.

Note: call records purged from Tality via **Auto Archive** are no longer available to the **Billing History** report.

Billing History can also be accessed via the **Guest/User** screen. When accessed via the **Guest/User** screen **Billing History** allows you to reprint bills only for the guest/user currently displayed on the **Guest/User** screen. On the other hand, **Billing History** invoked via **Reports** provides access to all available previously printed bills.

11. Click on the **Reports** toolbar icon.
    Alternately, click on **Reports → Reports** on the main menu.
    The **Tality Reports** screen comes up.

12. Click on the **Billing History** option button.

13. Select **Detail** or **Summary** from the report **Type** list.

14. Select the desired output type. Your choices are: Printer, Preview, Email, File (PDF), and Billing Default Output.

    Select **Printer** to print the billing report.

    Select **Preview** to view the billing report on the screen.

    Select **Email** to email the billing history report.
    Click on the pencil icon next to the **Email To** list to enter the recipients' email address.
    The **Create Email** screen appears. Type email address into the **To** field. Alternately, you can click on the **Address Book** icon in the left-hand corner and select an existing email address. Fill in the **Subject** field and the email body text. Click on **OK**

15. Select **File (PDF)** to save the billing report as a PDF file.

    When **File (PDF)** option is selected the **File** field becomes enabled. Enter the path to the PDF file or browse for it using the hand icon adjacent to the **File** text box.

16. Select **Billing Default Output** to use options specified for this Guest\Client via the **Guest\Client** screen. Depending on what has been selected for this Guest\Client the report can be printed (Paper Bill option), or emailed (Email Bill option), or both.

17. If you wish every other row of the bill highlighted for better readability click on **Highlight Alternating Report Rows**.

    ☑ Highlight Alternating Report Rows

18. Select **Detail** or **Summary** from the **Type** list.

19. Click on **Next** to continue.

20. Click on **OK**. The **Select Billing History Records** screen appears.

21. Select **Bill Date** or **Name** from **Sort List By** option group.
    Bill Date will populate the underlying list with the date, time and the name corresponding to the bill or batch billing.
    Name will populate the underlying list with the name and the room number corresponding to the guest/user.

22. Select the desired date and time (in case of **Bill Date** sort) or guest/user name (in case of **Name** sort) and the billing spreadsheet will display billing records associated with it.
    The spreadsheet can be sorted by clicking on any of the column headers. The current sort column is marked with the appropriate sort order icon: **AZ** for ascending or **ZA** for descending.

    To change the sort order from ascending to descending and vice versa click on the sort icon ![icon] in the right hand corner of the screen and sort the list of billing records by clicking on one of the column headers.

23. Each billing record stands for a bill printed in the past for the selected guest/user or the selected batch billing.
    The first cell of each record contains a check box. To select bills for printing click on the boxes corresponding to them.
    To select all bills click on the **All** button with **an icon of a check mark** located in the lower left-hand corner of the screen. To deselect all billing records click on the **All** button with **an icon of an empty square**.

    The **Show** option group on the bottom of the screen lets you limit the list of billing records to **Users** only or **Guests** only.

24. Click on **Next**.

25. Depending on which **Output** option has been selected at the beginning, the bill(s) is either printed or it appears in a preview window.

If you are running a report in the **Preview** mode, once generated, the report screen displays a side menu.

Page 1 of 12 → Displays the current page number and the total page count

→ Click on the arrows to navigate through pages

Go to page → Use the **Go to page** button to go to a specific page

Whole Page → This list contains view options. **Whole Page** – display one whole page in its entirety, **65%** - displays report page/s 65 % of original size, **100%** - displays report page/s 100% of original size

→ Select between one or two page view (two page view is not available when **Whole Page** is selected)

Close and Print → **Close and Print** closes the report preview window and brings up the print screen

Reset → **Reset** – brings up the filter screen and allows for changing filter criteria and running this report again

Close → **Close** – closes the report screen

Report Scheduler

Scheduling Reports

You can set up reports to be recurrently run and output to one of the available printers via the **Report Scheduler** screen. This screen has a spreadsheet format with all scheduled reports listed. Reports can be scheduled to run **Daily**, **Weekly**, **Biweekly**, **Monthly**, or only **Once**.

To schedule a report

1. Click on the **Report Scheduler** toolbar icon.
   Alternately, click on **Reports→ Report Scheduler** on the main menu.
   The **Report Scheduler** screen comes up.

2. Click on the **New** button. The **Tality Reports** screen comes up.

3. The names of the available reports are displayed on the left hand side panel.
   Click on the option button corresponding to the desired report to select it.
   The left hand side panel contains options that pertain to the selected report.

4. Select the desired output type. Your choices are: Printer, Preview, Email, and File (PDF).
   In case of Batch Billing or Billing History reports there is one more option available - Billing Default Output.

   Select **<u>Printer</u>** to print the report.

   Select **<u>Preview</u>** to view the report on the screen.

   Select **<u>Email</u>** to email the report.
   Click on the pencil icon next to the **Email To** list to enter the recipients' email address.
   The **Create Email** screen appears. Type email address into the **To** field. Alternately, you can click on the **Address Book** icon in the left-hand corner and select an existing email address. Fill in the **Subject** field and the email body text. Click on **OK**.

5. Select **File (PDF)** to save the report as a PDF file.

When **File (PDF)** option is selected the **File** field becomes enabled. Enter the path to the PDF file or browse for it using the hand icon adjacent to the **File** text box.

6. Select **Billing Default Output** to use options specified for this Guest\Client via the **Guest\Client** screen. Depending on what has been selected for this Guest\Client the report can be printed (Paper Bill option), or emailed (Email Bill option), or both.
Billing Default Output option is available only for Batch Billing and Billing History reports.

7. All reports have an option of having alternate rows highlighted for better readability. This option is by default turned on.

8. Longest Calls, Most Active Extensions, Most Frequently Called Phone Numbers and Most Expensive Calls reports have an option to report on a specified number of records counting down from the top.

9. Some of the detail reports can be printed starting new groups with new pages. For example, detail report **Phone Activity by Authorization Code** can be printed with a new page for each new Authorization Code.

☑ New Page For Each Authorization Code
☑ Reset to Page 1

In our example we also checked **Reset to Page 1** option. Each new Authorization Code will start with a new page and the page numbers will restart from number 1 with each new section.

10. Select how frequently the scheduled report should be ran from the **Run** list.

Run: Weekly ▼
Biweekly
Daily
Monthly
Once
Weekly

11. Depending on the **Run** field entry the **When** field displays either a list of options, a date field, or is not available for entry.

Run list selection	**When** field
Daily	The **When** field is not available for entry. The report will run every day, once a day.
Monthly	The **When** field becomes an option list enumerating days of the month starting from 1st to 31st and an option "Last Day". Select an appropriate day of the month. The report will run every month, once a month on a selected day
Once	The **When** field becomes a date field. You can enter a date manually, or select it from a calendar. This report is going to be run only once on an entered date.
Weekly	The **When** field becomes an option list enumerating days of the week starting from Sunday to Saturday. Select an appropriate day of the week. The report will run once a week on a selected day.

12. Enter the time of the day you want to run the scheduled report into the **Time** field.

Time: 08 : 00   i.e. 8:00 A.M.

13. Select one of the available printers from the list of the printers expandable from the **Printer** field.

Example:
The scheduled report in this case is **Guest/User Activity**.

The detail Guest/User Activity will run weekly on Mondays at 8:00 AM and will output to the HP LaserJet 4050 printer.

14. Click on **Next** to continue. The report filter screen appears.
    This screen is just like a filter screen used to run a report. However, it has a few differences. Instead of the **OK** button it has the Back and Finished buttons.

    Back ◄◄◄   Finished ►►►

    The Back button takes you back to the Tality Report screen and the Finished button schedules the report.
    How to use report filter

15. Once the report is scheduled it is added to the Report Scheduler spreadsheet.

16.
	Active	Tality Report	Run	When	Time
►	●	Guest/User Activity	Weekly	Mon	08 : 00	…

17.
Printer	Type	Last Run Date
\trisysdc1\HP LaserJet 40	Detail		…

18.
Next Run Date	Log
Mon 07/02/2007 08:00		…

19. The newly scheduled report is saved as **Active**. You can change its status by clicking on the green ball in the **Active** field. It will change its color to red indicating the scheduled report is not active. This will remove the report out of the scheduler temporarily.

20. In our example a **Guest/User Activity** report will be printed to the specified printer weekly on Mondays at 8:00 AM as **Detail** report and the **Next Run Date** is the next Monday. The **Last Run Date** is empty because the report has not been run yet. Otherwise, it would display the last date when the report was ran.

21. Click on **OK** to save changes and **Exit** the **Scheduler** screen.

To edit the scheduled report

1. Click on the **Report Scheduler** toolbar icon.
   Alternately, click on **Reports**➔ **Report Scheduler** on the main menu.
   The **Report Scheduler** screen comes up.

2. Select the desired report from by clicking on the spreadsheet row corresponding to it.

	Active	Tality Report	Run	When	Time
▶	🟢	Guest/User Activity	Weekly	Mon	08 : 00

3. Click on the **Edit** button. The **Tality Reports** screen comes up.

4. The names of the available reports are displayed on the left hand side panel.
   Click on the option button corresponding to the desired report to select it.
   The left hand side panel contains options that pertain to the selected report.

5. All reports have an option of having alternate rows highlighted for better readability. This option is by default turned on.

   ☑ Highlight Alternating Report Rows 🔄

6. Some of the reports can be run as **Detail** or **Summary**. In that case **Type** list is available and you can select the desired report format.

7. Longest Calls, Most Active Extensions, Most Frequently Called Phone Numbers and Most Expensive Calls reports have an option to report on a specified number of records counting down from the top.

   Top: 20 ⬍ 🔄

8. Some of the detail reports can be printed starting new groups with new pages. For example, detail report **Phone Activity by Authorization Code** can be printed with a new page for each new Authorization Code.

   ☑ New Page For Each Authorization Code
   ☑ Reset to Page 1

   In our example we also checked **Reset to Page 1** option. Each new Authorization Code will start with a new page and the page numbers will restart from number 1 with each new section.

9. Select how frequently the scheduled report should be ran from the **Run** list.

   Run: Weekly ▼
   Biweekly
   Daily
   Monthly
   Once
   Weekly

10. Depending on the **Run** field entry the **When** field displays either a list of options, a date field, or is not available for entry.

Run list selection	**When** field
Daily	The **When** field is not available for entry. The report will run every day, once a day.
Monthly	The **When** field becomes an option list

	enumerating days of the month starting from 1st to 31st and an option "Last Day". Select an appropriate day of the month. The report will run every month, once a month on a selected day
Once	The **When** field becomes a date field. You can enter a date manually, or select it from a calendar. This report is going to be run only once on an entered date.
Weekly	The **When** field becomes an option list enumerating days of the week starting from Sunday to Saturday. Select an appropriate day of the week. The report will run once a week on a selected day.

11. Enter the time of the day you want to run the scheduled report into the **Time** field.

    Time: 08:00   i.e. 8:00 A.M.

12. Select one of the available printers from the list of the printers expandable from the **Printer** field.

    Example:
    The scheduled report in this case is **Guest/User Activity**.

    The detail Guest/User Activity will run weekly on Mondays at 8:00 AM and will output to the HP LaserJet 4050 printer.

13. Click on **Next** to continue. The report filter screen appears.
    This screen is just like a filter screen used to run a report. However, it has a few differences. Instead of the **OK** button it has the Back and Finished buttons.

50

The Back button takes you back to the Tality Report screen and the Finished button schedules the report.
How to use report filter

14. Once you are done editing changes are reflected in the Report Scheduler spreadsheet.

15. Click on **OK** to save changes and exit the **Scheduler** screen.

To remove a report out of Report Scheduler temporarily

1. Click on the **Report Scheduler** toolbar icon.
   Alternately, click on **Reports→ Report Scheduler** on the main menu.
   The **Report Scheduler** screen comes up.

2. Go to the desired report record and click on the green ball in the **Active** field. The ball's color changes to red.

   .

   This report will still exist in **Report Scheduler** but it will not be run.

3. Click on **OK** to save changes and exit the **Scheduler** screen.

To delete a scheduled report

1. Click on the **Report Scheduler** toolbar icon.
   Alternately, click on **Reports→ Report Scheduler** on the main menu.
   The **Report Scheduler** screen comes up.

2. Go to the desired report record and click the record selector .

3. Click on **Delete**. Click on **OK** to the confirmation message.

4. Click on **OK** to save changes and exit the **Scheduler** screen.

5. If you deleted a wrong report, provided you didn't close the **Scheduler** screen yet, you can bring that report

   back by clicking on **Undo All** .

Pricing

Custom Pricing

Custom Pricing screen allows 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.

To add a new pricing record

1. Click on the **Custom Pricing** toolbar icon.
   Alternately, click on **Pricing → Custom Pricing** on the main menu.
   The **Custom Pricing** screen comes up.

2. Click on the **New** button. A new row is highlighted. The **Call Type** (first) field of the new row is a drop down list. When the new row is created the list displays **Enter Number** item by default.

   The **Call Type** list contains several predefined entries.

   If you select any of them, the corresponding **Number Dialed** value appears in the adjacent cell.
   However, if the desired call type is not on the list you need to enter the **Number Dialed** value manually. To do this select **Enter Number** from the **Call Type** list (if not already selected) and press on Tab to move to the **Number Dialed** filed.

3. In the **Number Dialed** field type a number, consisting of an area code and an exchange, or a special country code.
   It supports partial numbers i.e.

   NPA976 – prices all the calls with exchange 976 for any area code.
   973 – prices all the calls with an area code 973 for any exchange.
   NPANXX – default price for all the calls.
   L – prices all local calls. It overwrites V&H prices if you have them downloaded.
   LD - prices all long distance calls. It overwrites V&H prices if you have them downloaded.

4. Type time in the first **From** field (this would be a start time of the first time period). You can move from cell to cell by pressing on Tab.

5. Type rate for the first minute in the **First Minute** field.

6. Type rate for each additional minute in the **Next Minute** field.

7. Enter time and rates for the additional time periods only if they are different. Otherwise, TALITY will assume that calls are priced at the same rate all day long.

8. Click on **New** to create another record or **OK** to save the changes and leave the screen. If you do not wish to save any changes click on **Cancel**.

To delete pricing record

1. Click on the **Custom Pricing** toolbar icon.
   Alternately, click on **Pricing → Custom Pricing** on the main menu.
   The **Custom Pricing** screen comes.

2. Click anywhere on the record to select it and click on the **Delete** button.

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

To sort pricing records

The **Custom Pricing** screen is a combination of rows and columns. You can sort pricing data using the column headers.

For example, clicking on the **Number Dialed** column header sorts pricing table by the **Number Dialed**

field in the direction indicated by a sort button [A↓Z] located in the right hand corner of the screen.

A↓Z
Number Dialed

To change the sort direction click on the sort button [Z↓A].

Click on the column's header to sort the list in a new direction.

Z↓A
Number Dialed
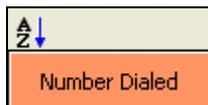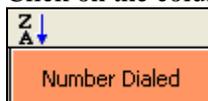
Surcharge

Surcharges are typically used to generate additional revenue for the establishment. When a surcharge is applied to a guest/user account it defines how calls from the extension(s) assigned to the guest/user 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

The **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.

To create surcharges

1. Click on the **Surcharge** toolbar icon.
   Alternately, click on **Pricing → Surcharge** on the main menu.
   The **Surcharge** screen comes up.

2. Enter surcharges.

3. Click on **OK** to save changes.

   Some examples of surcharges:

- **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.

	Grace Period		——— Surcharge ———		
	MM : SS		Per Call	Per Min	Multiplier
Operator:	0 : 30		0.50	0.50	0%

- **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** $1 per call **plus** 50 cents for each minute **multiplied by** 20%.

Long Distance:	0 : 30		1.00	0.50	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%.

International:	0 : 50		3.00	0.50	35%

- For all the call types below surcharge will be added on top of the rate in Custom Pricing (if any).

- **Local** calls have no grace period and they have a surcharge of 50 cents per call.

Local:	0 : 0		0.50	0.00	0%

- **411** calls have no grace period and they have a surcharge of 75 cents per call.

411 Calls:	0 : 0		0.75	0.00	0%

- **NPA-555** calls have no grace period and they have a surcharge of 50 cents per call.

NPA-555 Calls:	0 : 0		0.50	0.00	0%

- **Toll Free-NXX** calls have no grace period and no surcharge.

Toll Free-NXX Calls:	0 : 0		0.00	0.00	0%

- **700-NXX** calls have no grace period and have a surcharge of 30 cents per call.

700-NXX Calls:	0 : 0		0.70	0.00	0%

- **NPA-976** calls have 30 seconds grace period and have a surcharge of $2 per call.

NPA-976 Calls:	0 : 30		2.00	0.00	0%

- **900-NXX** calls have no grace period and they have a surcharge of $5 dollars per call plus $1 for each minute.

900-NXX Calls:	0 : 0		5.00	1.00	0%

- 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 with a 30 seconds grace period and a surcharge of 50 seconds per minute.

877-NXX Calls:	0 : 30		0.50	0.00	0%

4. Press **OK** to save your work and leave the screen.

To edit surcharges

1. Click on the **Surcharge** toolbar icon.
    Alternately, click on **Pricing → Surcharge** on the main menu.
    The **Surcharge** screen comes up.

2. Overwrite existing values with new ones and click **OK** to save changes.

Recurring Charge

Recurring Charge is a fixed charge for use of the phone equipment, access to multiple telephone lines, etc. It can be applied daily or monthly. For example, if you create a monthly recurring charge of $10.00 and apply this charge to the selected **Guest/User** account (via the Guest/User screen) the charge will be added to this guest/user bill. In other words recurring charges have to be assigned to **Guest/User** accounts in order to affect billing.

To add a new recurring charge

1. Click on the **Recurring Charge** toolbar icon.
    Alternately, click on **Pricing → Recurring Charge** on the main menu. The **Recurring Charge** screen comes up.
    You can also access this screen by clicking on the **Recurring Charges** button on the **Guest/Users** screen.

2. Click on the **New** button.

3. The **New Recurring Charge** entry screen comes up.

4. Enter the recurring charge dollar value into the **Amount** field.

5. Enter short description of the recurring charge into the **Description** field.

6. Select the appropriate time frame from the **Applied** list.

Daily
Daily
Monthly
Weekly

7. Click on **OK**

8. The new recurring charge is added to the **Recurring Charges** list.

9. Click on **OK** when finished to leave this screen.

To edit Recurring Charge

1. Click on the **Recurring Charge** toolbar icon.
    Alternately, click on **Pricing → Recurring Charge** on the main menu. The **Recurring Charge** screen comes up.
    You can also access this screen by clicking on the **Recurring Charges** button on the **Guest/Users** screen.

2. Click on the desired recurring charge record to select it.

3. Click on **Edit**.

4. The **Edit Recurring Charge** entry screen comes up

5. Overwrite field entries with new values.

6. Click on **OK** to save changes.

7. The **Recurring Charge** screen reflects changes.

8. Click on **OK** to leave this screen.

To delete Recurring Charge

1. Click on the **Recurring Charge** toolbar icon.
    Alternately, click on **Pricing → Recurring Charge** on the main menu. The **Recurring Charge** screen comes up. You can also access this screen by clicking on the **Recurring Charges** button on the **Guest/Users** screen.

2. Click on the desired recurring charge record to select it.

3. Click on **Delete**.

4. Click on **OK** to the confirmation message.

5. The selected recurring charge is removed from the charges list

6. Click on **OK** to leave this screen.

To sort Recurring Charge records

The **Recurring Charge** screen is a combination of rows and columns.
You can sort this table data using the column headers.
For example, clicking on the **Amount** column header sorts pricing table by the **Amount** field in the direction indicated by a sort button located in the right hand corner of the screen.

To change the sort direction click on the sort button ![Z↓].
Notice, the table sort order changes accordingly.
Click on the column's header to sort the list in a new direction.

Z↓
Amount
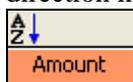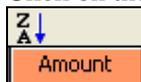
Edit Destination File

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 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.) Check the check box under the **Local** field.

To find the Destination File record

1. Click on the **Edit Destination File** toolbar icon.
   Alternately, click on **Pricing → Edit Destination File** on the main menu. The **Destination File** screen comes up.

2. Click on the **Search** button.
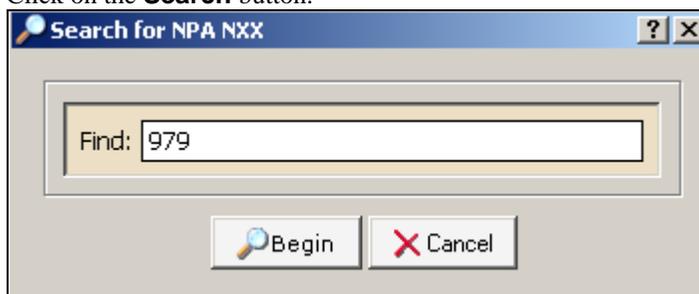
   Enter the number you would like to look for in the **Find** text box and click on **Begin** to proceed with the search.

3. The records selector of the **Destination File** screen moves to the desired record.

   | 979 | NPA SUMMRY | TX | ☐ |

To add new area code or exchange to the Destination File

1. Click on the **Edit Destination File** toolbar icon.
   Alternately, click on **Pricing → Edit Destination File** on the main menu. The **Destination File** screen comes up.

2. Click on the **New** button. The record selector [▶] moves down to an empty row of cells.

Enter the appropriate values

3. In the **NPA NXX** 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 **State** field. If it is your local exchange check the check box under the **Local** field.

NPA NXX	City/Country	State	Local
01148	POLAND		☐

4. Click on **OK** to save changes and exit.

To change the Destination File record

1. Click on the **Edit Destination File** toolbar icon.
   Alternately, click on **Pricing → Edit Destination File** on the main menu. The **Destination File** screen comes up.

2. Place the cursor in a field you want to edit. Type in the new values.

3. Click on **OK** to save changes and exit.

To delete the Destination File record

1. Click on the **Edit Destination File** toolbar icon.
   Alternately, click on **Pricing → Edit Destination File** on the main menu. The **Destination File** screen comes up.

2. Place the cursor anywhere in a record you want to delete.

3. Click on **Delete**.

4. Click on **OK** to save changes and exit.

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 **Import V&H Pricing** toolbar icon.
   Alternately, click on **Pricing → Import V&H Pricing** on the main menu. The **V&H Pricing File Import**

screen comes up.
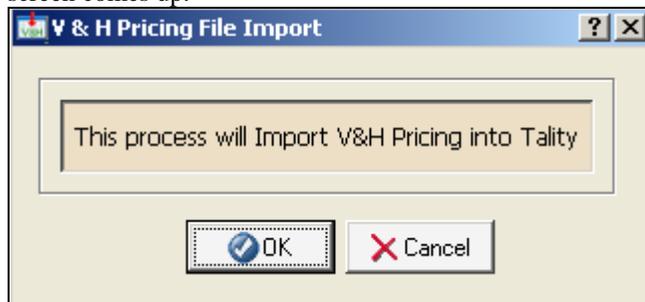
2. Click on **OK** if you want to proceed, **Cancel** if you want to abort.

3. The message "This process will overwrite current pricing information" may appear. Click on **OK.**

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

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4. Click on the **Call Editor** toolbar icon.
   Alternately, click on **Controls → Call Editor** on the main menu.
   The **Call Editor** screen comes up. It is populated with all the calls in collected by TALITY.

5. To find the records you want to recost you can use the **Set** button to narrow down call.
   Click on the **Set** button.

6. The Call Editor filter screen appears.
   For instruction on how to use filter screen see **How to use report filter** on page 20.

   To go back to the "before filter" selection click on the **Clear** button .

7. If you want to recost only one record position cursor on the record to be recosted. Otherwise, if you want to recost all records displayed by Call Editor, proceed with the next step.

8. Go to the recosting options located in the right-hand lower corner of the **Call Editor** screen.

9. Click on the down arrow of the **Recosting** list to select type of recosting you want to perform.

Quick Recost = current charges are recalculated based on the Custom Pricing and the V&H rate tables.
Add Flat Amount = existing charges + the specified flat dollar amount.
Percentage Adjust = existing charges + the specified percentage of the existing charges.

For example if the Actual Cost is $5.00 recosting by 10% with Percentage Adjust would result in increasing Actual Cost by 50 cents (10% of $5.00). Actual Cost would change to $5.50.

Percentage Adjust + Add Flat Amount = existing charges + the specified percentage of the existing charges + the specified flat dollar amount.

For example, recosting a record with actual cost of $1.00 and amount charged of $1.00 and applying the following criteria

 results in actual cost and amount charged increased to

$2.50 = $1.00 (existing cost) + $0.50 (Percentage, 50% of $1.00) + $1.00 (Flat Amount).

Add Flat Amount + Percentage Adjust = existing charges + the specified flat dollar amount + specified percentage of the sum of existing charges and the specified flat dollar amount.

For example, recosting a record with actual cost of $1.00 and amount charged of $1.00 and applying the following criteria

 results in actual cost and amount charged increased to

$3.00 = $1.00 (existing cost) + $1.00 (Flat Amount) + $1.00 (Percentage, 50% of $2.00- existing cost + Flat Amount)

Replace With Flat Amount = dollar amount entered in the Flat Amount field overwrites excising charges (see example below)

10. In our example we've selected **Replace With Flat Amount** recosting.

    Enter dollar amount into the **Actual Cost** field and the **Amount Charged** field

11. If you want to recost only one record click on **Recost**. Otherwise, if you want to recost all records displayed by Call Editor, click on **Recost All**.

12. In our example we've recosted only selected record. The **Call Editor** screen reflects changes.

13. Click on **OK** to save changes and exit the **Call Editor** screen.

Import Destination File Data

This utility is used to import an update for City and State Database. Such an update is available to purchase, when needed through your dealer.

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

1. Click on the **Import Destination File** ![icon] toolbar icon.
   Alternately, click on **Pricing → Import Destination File** on the main menu. The **Destination File Import** screen comes up.
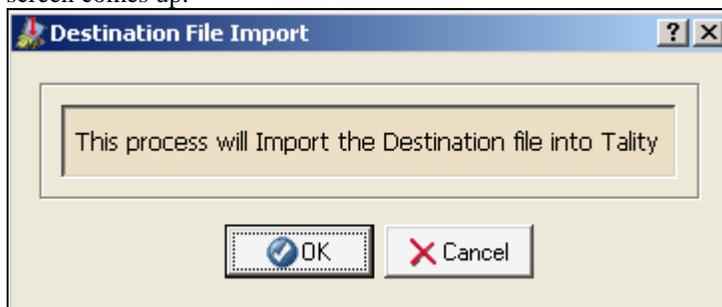
2. Click on **OK** if you want to proceed, **Cancel** if you want to abort.

3. The message "This process will overwrite current files" may appear. Click on **OK.**

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

Trunks

![icon]

The Trunks Screen is used to assign carriers to trunks if you purchased a V&H data package.

To add a new trunk

1. Click on the **Trunks** ![icon] toolbar icon.
   Alternately, click on **Pricing → Trunks** on the main menu.
   The **Trunks** screen comes up.

2. Click on **New** button.

   The record selector ![icon] moves to the empty row.

   ![field] Enter trunk number in a first cell corresponding to the **Trunk** field.

   ![field 0156]
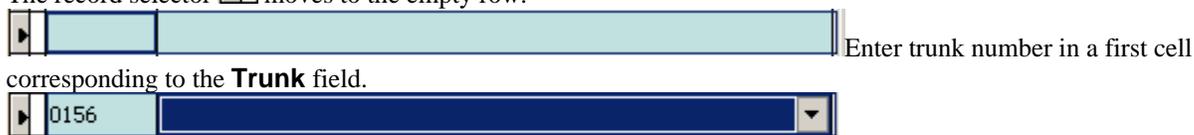
3. Click on a down arrow of the list corresponding to the **Carrier** field to bring up a list of carriers. Select the appropriate carrier.

4. Click on **OK** to save the changes. The message "Information Saved" will appear in the left corner of your main screen.

To edit an existing trunk

1. Click on the **Trunks** toolbar icon.
   Alternately, click on **Pricing → Trunks** on the main menu.
   The **Trunks** screen comes up.

2. To edit trunk number simply place your cursor in the Trunk field of a desired record and type in the new value. To edit a carrier select desired carrier form the list.

3. Click on **OK** to save the changes. The message "Information Saved" will appear in the left corner of your main screen.

To delete a trunk

1. Click on the **Trunks** toolbar icon.
   Alternately, click on **Pricing → Trunks** on the main menu.
   The **Trunks** screen comes up.

2. Click anywhere on a desired record to select it.

3. Click on **Delete** button.

4. TALITY prompts you to confirm deletion with the message.
   Click on **OK**. The record is deleted.

To sort trunks

The **Trunks** screen is a combination of rows and columns.
You can sort this table data using the column headers.
For example, clicking on the **Trunk** column header sorts pricing table by the **Trunk** field in the direction

indicated by a sort button located in the right hand corner of the screen.
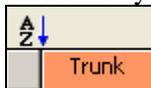
To change the sort direction click on the sort button .
Notice, the table sort order changes accordingly.
Click on the column's header to sort the list in a new direction.
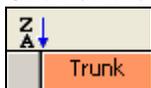
Controls

Call Editor

The **Call Editor** allows you to modify existing call records as well as add information for calls made outside your telephone system.

To open Call Editor

1. Click on the **Call Editor** toolbar icon.
    Alternately, click on **Controls → Call Editor** on the main menu.
    The **Call Editor** screen comes up. It is populated with the calls collected by TALITY.

2. You can use the **Set** button to narrow down call data to the call records you are interested in.
    Click on the **Set** button.

3. The Call Editor filter screen appears. How to use report filter

4. The top of the **Call Editor** screen indicates its contents have been filtered .

    To go back to the "before filter" selection click on the **Clear** button .

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 Editor records

1. Click on the **Call Editor** toolbar icon.
    Alternately, click on **Controls → Call Editor** on the main menu.
    The **Call Editor** screen comes up. It is populated with all the calls in collected by TALITY.

2. You can use the **Set** button to narrow down call data to the call records you are interested in.
    Click on the **Set** button.

3. The Call Editor filter screen appears. How to use report filter

4. The top of the **Call Editor** screen indicates its contents have been filtered .

    To go back to the "before filter" selection click on the **Clear** button .
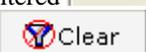
5. Once you found the record you need to change click on the desired field and type in a new value.

6. Click on **OK** to save changes.

Every field can be edited.

Components of a Call Record

- **Date:**
  Date of the call (provided by either the telephone system or the computer).

- **Time:**
  Time of the call provided by the telephone system.

- **Call Length:**
  Length of the call provided by the telephone system in hh:mm:ss format.

- **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.

- **Call Direction:**
  In = Incoming
  Out = Outgoing

- **Phone Number:**
  This field describes the telephone number dialed. The phone number should be entered in the following format: 0|1 (Areacode) Number i.e. 1 973 3602300

- **Price Call:**
  Check this check box if you need to price this call record.

- **Actual Cost:**
  Actual cost associated with Trunks and Carriers.

- **Amount Charged:**
  Combination of Actual Cost and Surcharge/Multiplier.

- **Authorization Code:**
  A unique identifier used for administrative extensions (optional).

To add a call record

1. Click on the **Call Editor** toolbar icon.
   Alternately, click on **Controls → Call Editor** on the main menu.
   The **Call Editor** screen comes up. It is populated with all the calls in collected by TALITY.

2. Click on the **New** button.
   The record selector moves to the empty record on the bottom of the call data list.

   | ▶ | 08/02/2006 | ▦ ▼ | 15:14 | 00 : 00 : 00 | 9999999999 | ▼ | In | ▼ |

   The first two cells corresponding to the **Date** and **Time** are filled with current date and time. Populate all of the fields with desired values.

3. Click on **OK** to save changes.

To delete a call record

1. Click on the **Call Editor** toolbar icon.
   Alternately, click on **Controls → Call Editor** on the main menu.
   The **Call Editor** screen comes up. It is populated with all the calls in collected by TALITY.

2. You can use the **Set** button [Y Set] to narrow down call data to the call records you are interested in. Click on the **Set** button.

3. The Call Editor filter screen appears. How to use report filter

4. The top of the **Call Editor** screen indicates its contents have been filtered [**Filter In Use**].

    To go back to the "before filter" selection click on the **Clear** button [Clear].

5. Once you found the record you want to delete click on the **Delete** button.

6. Click on **OK** to save changes.

To recost call records

1. Click on the **Call Editor** [icon] toolbar icon.
    Alternately, click on **Controls → Call Editor** on the main menu.
    The **Call Editor** screen comes up. It is populated with all the calls in collected by TALITY.

2. To find the records you want to recost you can use the **Set** button [Y Set] to narrow down call. Click on the **Set** button.

3. The Call Editor filter screen appears. How to use report filter

    To go back to the "before filter" selection click on the **Clear** button [Clear].

4. If you want to recost only one record position cursor on the record to be recosted. Otherwise, if you want to recost all records displayed by Call Editor, proceed with the next step.

    | ► | 01/28/2006 | 8:01 | 00 : 05 : 08 | 179 | 0048 ▼ | Out ▼ | 1 (800) 3269642 | ☑ | $1.00 |

5. Go to the recosting options located in the right-hand lower corner of the **Call Editor** screen.

6. Click on the down arrow of the **Recosting** list to select type of recosting you want to perform.

    Recosting
    | Replace With Flat Amount ▼ |
    | Quick Recost |
    | Add Flat Amount |
    | Percentage Adjust |
    | Percentage Adjust + Add Flat Amount |
    | Add Flat Amount + Percentage Adjust |
    | Replace With Flat Amount |

    Quick Recost = current charges are recalculated based on the Custom Pricing and the V&H rate tables.
    Add Flat Amount = existing charges + the specified flat dollar amount.
    Percentage Adjust = existing charges + the specified percentage of the existing charges.
    For example if the Actual Cost is $5.00 recosting by 10% with Percentage Adjust would result in increasing Actual Cost by 50 cents (10% of $5.00). Actual Cost would change to $5.50.
    Percentage Adjust + Add Flat Amount = existing charges + the specified percentage of the existing charges + the specified flat dollar amount.
    For example, recosting a record with actual cost of $1.00 and amount charged of $1.00 and applying the following criteria

results in actual cost
and amount charged increased to

$2.50 = $1.00 (existing cost) + $0.50 (Percentage, 50% of $1.00) + $1.00 (Flat Amount).

Add Flat Amount + Percentage Adjust = existing charges + the specified flat dollar amount + specified percentage of the sum of existing charges and the specified flat dollar amount.

For example, recosting a record with actual cost of $1.00 and amount charged of $1.00 and applying the following criteria

results in actual cost
and amount charged increased to

$3.00 = $1.00 (existing cost) + $1.00 (Flat Amount) + $1.00 (Percentage, 50% of $2.00- existing cost + Flat Amount)

Replace With Flat Amount = dollar amount entered in the Flat Amount field overwrites excising charges (see example below)

7. In our example we've selected **Replace With Flat Amount** recosting.

   Enter dollar amount into the **Actual Cost** field and the **Amount Charged** field

8. If you want to recost only one record click on **Recost**. Otherwise, if you want to recost all records displayed by Call Editor, click on **Recost All**.

9. In our example we've recosted only selected record. The **Call Editor** screen reflects changes.

10. Click on **OK** to save changes and exit the **Call Editor** screen.

To sort Call Editor records

The **Call Editor** screen is a combination of rows and columns. You can sort pricing data using the column headers.

For example, clicking on the **Date** column header sorts pricing table by the **Date** field in the direction indicated by a sort button located in the right hand corner of the screen.
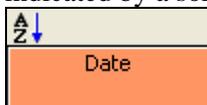
To change the sort direction click on the sort button ![Z↓ icon].
Notice, the table sort order changes accordingly.
Click on the column's header to sort the list in a new direction.
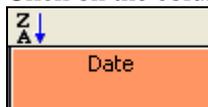
System Parameters

The **System Parameters** settings have to be entered before using TALITY.

1. Click on the **Call Editor** toolbar icon.
   Alternately, click on **Controls → System Parameters** on the main menu.
   The **Call Editor** screen comes up. It is populated with all the calls in collected by TALITY.

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

2. The **General** tab:

   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 available telephone systems.
   Click on the name of your phone equipment.

   EXTENDED PROCESSING
   Check this option if the expanded call data file (TPOUTWX.DAT) is being used.

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

   PRICE CALLS EVERY - this field defines the time interval for automatic pricing updates.

   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.

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

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

   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.

3. The **Switches** tab:

☑ Calculate Actual Charges After Grace Period
☐ Disable V+H Pricing
☐ Disable Credit Limit Checking
☑ Do Not Print Zero Cost Calls on Bill
☑ Price Operator Calls
☑ Remove Guest/User After Billing (Default)
☑ Separate V+H Long Distance and International Rates
☑ Surcharge Operator Calls
☑ Still print Bill when Guest/User owes recurring charge ONLY

CALCULATE ACTUAL CHARGES AFTER GRACE PERIOD

DISABLE V&H PRICING – Tality will not use V&H rates for pricing calls.

DISABLE CREDIT LIMIT CHECKING – if checked Tality will not verify that the Guest/User credit limit has been reached.

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.

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

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

SEPARATE V&H LONG DISTANCE AND INTERNATIONALL RATES – If checked, Tality will price calls differently for LONG DISTANCE and INTERNATIONAL calls. Example: Create an LD entry under custom pricing and check this option on the system parameters screen. Tality will then use the LD entry for domestic LONG DISTANCE and still use V&H for international pricing.

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

STILL PRINT BILL WHEN GUEST/USER OWES RECURRING CHARGE ONLY – If checked, Tality will print a Guest/User bill when there has not been any phone call activity but you still want to bill for the recurring charge.

4. The **Guest/User Charges** tab:

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

TAX RATE 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.

5. The **Email** tab:

ENABLE TALITY EMAIL SERVICE – check this option if you want to email reports and bills from TALITY.

MAIL SERVER – enter the name or IP Address of your SMTP Mail Server.

SMTP PORT – this field is by default set to port 25. If port 25 is blocked this value needs to be changed.

MAIL SERVER REQUIRES AUTHENICATION – check this option if your outgoing server (SMTP) requires authentication. Enter **User Name** and **Password**.

SMTP LOGGING – check this option if you want to log every email sent from TALITY.
You can view the log information by clicking on the **View** button. To delete a log file click on the **Clear** button.

FROM NAME and **FROM ADDRESS** – the sender name and the email address for all emails sent from TALITY. For example, **From Name** could be "Your Company Name – Billing Department" and **From Address** could be "billing@yourcompany.com".

EMAIL BILLING – click on this button to enter the subject and the comments for the automatic bill emailing. The subject and the comments are going to be send with the billing report unless another subject or comments are entered via the Guest/User screen.

6. The **Reports** tab:

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

Add Logo to Reports – check this check box if you want your reports to show your company logo in the report header.
Browse for the logo file by clicking on the **Select File** button, or enter the path to the logo file in the provided **Report Logo** field. Once found, you can control your graphic size by increasing or decreasing **Height** and **Width** values.

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

TOP FOR LONGEST AND MOST REPORTS (DEFAULT) – enter the number of records counted from the top to be shown on the Longest and Most reports by default. A user will be able to change this setting individually for any given report on via the Tality Report screen.

HIGHLIGHT ALTERNATING REPORT ROWS(DEFAULT) – check this option if you want all report to have every other row highlighted by default. A user will be able to change this setting individually for any given report on via the Tality Report screen.

DISPLAY AUTHORIZATION CODE (DEFAULT) – check this option if you want to show authorization code on the reports (where applicable) by default.
A user will be able to change this setting individually for any given report on via the Tality Report screen

7. The **Other** tab:

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).

Save Archived Calls For: –how long would you like to keep call records in the archive location. 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 the auto archive/optimize runs as scheduled.

View – click on this button to view archive/optimize log.

Clear – click on this button to clear archive/optimize log.

Room Label – enter a label you want to use to as a part of a room name.
If you enter Suite into a Room Label field all report and screen entry fields referring to rooms will use Suite label instead.
The example below of how room label has changed is taken from the **Guest/User** screen.

Suite: [732 ▼]

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

System Access Control

System Access Control is used to create user profiles with different permission levels.

To create user profile

1. Click on the **System Access Control** toolbar icon.
    Alternately, click on **Controls → System Access Control** on the main menu.

2. The **System Access Control** screen opens on **New Profile** by default. However, if you are working with the Edit Profile screen you need to click on the **New** button to get to the **New Profile** screen.

3. Enter the new profile description in the **Description** field. For example the user's first and last name can be entered here.

4. Enter a password for this user.

5. To grant a user unlimited access to TALITY check the [☑ Check All] check box located in the right-hand lower corner.
    Otherwise, provide partial access by checking appropriate boxes.
    Most of the check boxes correspond to Tality utilities or reports.
    You can **grant** ☑ or **forbid** ☐ access to any TALITY screen

6. Click on **OK** to save changes when done creating new profile.

To edit user profile

1. Click on the **System Access Control** toolbar icon.
    Alternately, click on **Controls → System Access Control** on the main menu.

2. Click on the **Edit** button.

3. Select desired profile from the list.

4. Click on **OK**.

5. The **System Access Control** screen populates with settings of the selected profile.

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6. Make desired changes.

   To grant a user unlimited access to TALITY check the ☑ Check All check box located in the right-hand lower corner.
   Otherwise, provide partial access by checking appropriate boxes.
   Most of the check boxes correspond to Tality utilities or reports.
   You can **grant** ☑ or **forbid** ☐ access to any TALITY screen.

7. Click on **OK** to save changes when finished editing.

To delete user profile

1. Click on the **System Access Control** toolbar icon.
   Alternately, click on **Controls → System Access Control** on the main menu.

2. Click on the **Edit** button.

3. Select desired profile from the list.

4. Click on **OK**.

5. The **System Access Control** screen populates with settings of the selected profile.

6. Click on **Delete**.

7. Click on **OK** to the confirmation message.

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 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 COM Port (Serial or RS-232 port) make sure that this port doesn't conflict with the dedicated one.

To define the PMS parameters

1. Click on the **Property Management System** toolbar icon.
   Alternately, click on **Controls → Property Management System** on the main menu. The **Property Management System** screen comes up.

2. Click on the down arrow of the **System** box to invoke the list of the available systems. Select the appropriate **Property Management System**.

In case your Property Management System is not on the list click on the **Format** button [🗁 Format].
The **Format** screen appears. From this screen a custom record layout can be designed to meet your specific needs.

3. **Communications**
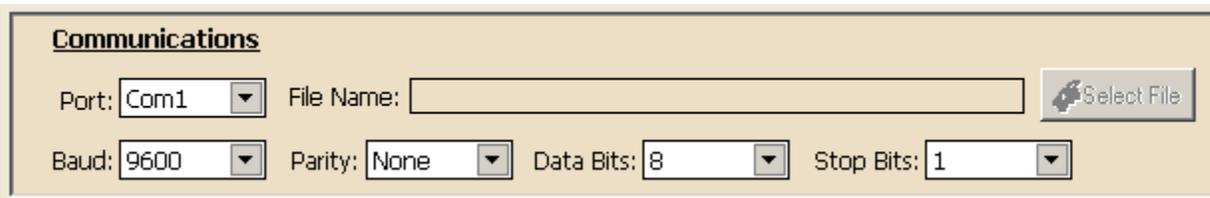
Pull down the **Port** listing. Select available COM Port or choose **File**. If you selected **File** option the **Select File** button and the **File Name** text box become active. Enter the path to the file that your Property Management System can work with into the text box, or browse for it by clicking on **Select File** button. Enter communication parameters **Baud**, **Parity**, **Data Bits** and **Stop Bits**.

4. **Flow Control**

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.

5. Checksum

6. **ENQ**
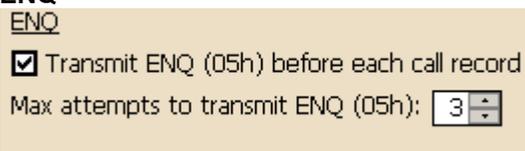
ENQ check box enables you to transmit the inquiry to the PMS system before the record is sent to verify if the system is ready to receive data. This option is only available with **ACK/NAK** type of flow control.

7. **Timers**

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.

8. **Maximum time to wait for ACK/NAK (Secs)….**- how long Tality will wait for an acknowledgment of record receipt form PMS. If an acknowledging signal is not received on time the record is regarded as not sent and Tality will attempt to send it out again. This option is available for the **ACK/NAK** flow control only.

9. **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.

10. **Other Parameters**

    Other Parameters

    Location Identifier: ABC

    ⊙ Do Not Print

    ☑ Transmit Admin extensions

    ○ Print All Posted and Unposted Records

    ☑ Transmit Zero Cost Calls

    ○ Print Unposted Records Only

    ☐ Monitor

    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.

    Enter the 3-character value identifying the installed location in **Location Identifier** field.

    Transmit Admin extensions– check this box if you want to process call records for extensions assigned to employees.

    Transmit Zero Cost Calls - this option will transmit the call record to the PMS even when the pricing on the call is $0.00. By default these call records do not get transmitted to the PMS.

    Monitor - enabling this option will display a screen that monitors the transmission of the call records to the PMS.

11. If you would like to save the settings click on **OK** or otherwise click on **Cancel**.

To create a new record format

This screen allows you to create a new record format that would meet the demands of your PMS. It also displays information about record formats for 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 clicking on the **New** button. In any case a new format will have to meet the requirements of your PMS (refer to PMS documentation for more information).

Creating new record format USING AN EXISTING FORMAT as a template

1. Click on **Edit**. A list of **Property Management Systems** displays. Highlight the name of the PMS format that you would like to make changes to and click **OK**.

2. The name of the system is displayed on the top of the screen in the **Property Management System** text box. It is read-only.

    Property Management System: CHOICE Format

3. The line below system's name represents the output layout of each record sent to the PMS. You can modify it by adding and taking away fields as described below.

    Output Layout

    ac01RRRRNNNNNPPPPPPPPPPPPPPPPP{CR}{LF}

4. **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 the **Add>** command button. Notice, selected item appears in the **Output** box. You can also remove any item or all items from the **Output** list box by clicking on **<Remove** or **<<Remove All** respectively.

The **Output Layout** line reflects changes to the **Output** box.

In our example we've added **Call Duration** to the **Output** list. The **Output Layout** line reflects this change – the **DDD.D** has been added to the end of the line.

5. The properties of the items listed in **Output** can be modified. To do this, select the desired filed name in the **Output** list. The **Format** section of the screen, located next to the **Output** list, is populated with the properties available to the selected field. Modify them according to your requirements. The **Output Layout** changes when the applicable properties are modified. For example: changing **Width** property of the field results with the changed width in the **Output Layout** line.

6. When finished editing you can save changes by clicking on the **Save As** button on the bottom of the screen. Note, only the **Save As** option is available in case of creating PMS format based on an existing format. This is to prevent you from overwriting the original PMS format.
    The **Save As** box displays. Enter the unique name for the new PMS format.
    Click on **OK**.

7. Click on **Exit** to return to the **Property Management System** Screen.

Creating new record format FROM SCRATCH

1. If you decide that you would rather create a record format for your PMS from scratch click on the **New** button and start with the blank form.

2. Fill in the name of your new system in the **Property Management System** text box. The name has to be unique.

    Property Management System: trisys format

3. Refer to your PMS documentation to find out what fields and characters your PMS format needs. Highlight the required fields and characters in the **Available** list box and transfer them one by one to the **Output** box using the **Add>** button. You can also remove any item or all items from the **Output** list box by clicking on **<Remove** or **<<Remove All** respectively.

The **Output Layout** line reflects changes to the **Output** box.

Output Layout

LID MM/DD/YY HH:MM EEEEEEE RRRR

4. The properties of the items listed in **Output** can be modified. To do this, select the desired filed name in the **Output** list. The **Format** section of the screen, located next to the **Output** list, is populated with the properties available to the selected field. Modify them according to your requirements. The **Output Layout** changes when the applicable properties are modified. For example: changing **Width** property of the field results with the

changed width in the **Output Layout** line.

5. To save the new format click on **Save**. The name of a new PMS format has to be unique.

To edit a record format

1. You can only edit custom formats. The pre-existing formats are read-only.
   You can create a new custom format using a preexisting format as a template and save it under a different name. See the section above for instructions on how do to that.

2. Click on the **Property Management System** [icon] toolbar icon.
   Alternately, click on **Controls → Property Management System** on the main menu. The **Property Management System** screen comes up.
   Click on the Format button next to the **Property Management System** text box.

3. The **Edit Format** screen appears. Click on the **Edit** button and select the desired custom format.

4. Click on **OK** to go back to **Edit Format** screen. The screen displays the selected format.

5. The name of the PMS custom format is displayed on the top of the screen in the **Property Management System** text box. It is read-only.

   Property Management System: trisys format

6. The line below system's name represents the output layout for each record sent to the PMS. You can modify it by adding and taking away fields as described below.

   Output Layout
   LID MM/DD/YY HH:MM EEEEEEE

7. **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 the **Add>** command button. Notice, selected item appears in the **Output** box. You can also remove any item or all items from the **Output** list box by clicking on **<Remove** or **<<Remove All** respectively.

The **Output Layout** line reflects changes to the **Output** box.

Output Layout

LID MM/DD/YY HH:MM EEEEEEE RRRR
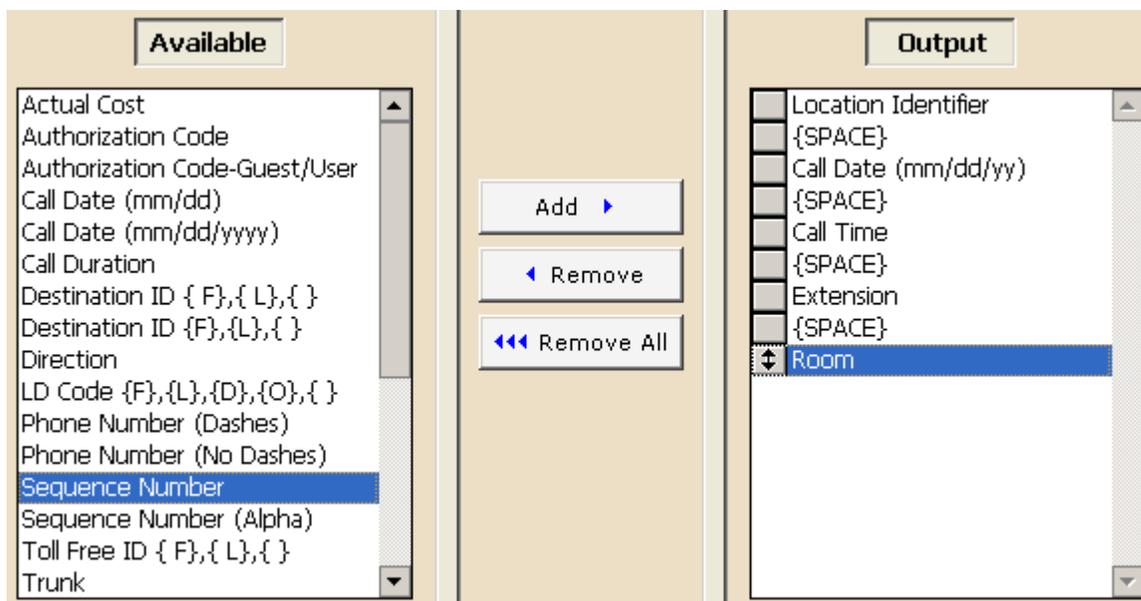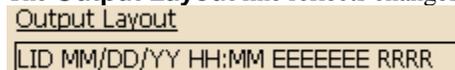
In our example we've added **Room** to the **Output** list. The **Output Layout** line reflects this change – the **RRRR** has been added to the end of the line.

8. The properties of the items listed in **Output** can be modified. To do this, select the desired filed name in the **Output** list. The **Format** section of the screen, located next to the **Output** list, is populated with the properties available to the selected field. Modify them according to your requirements. The **Output Layout** changes when the applicable properties are modified. For example: changing **Width** property of the field results with the changed width in the **Output Layout** line.
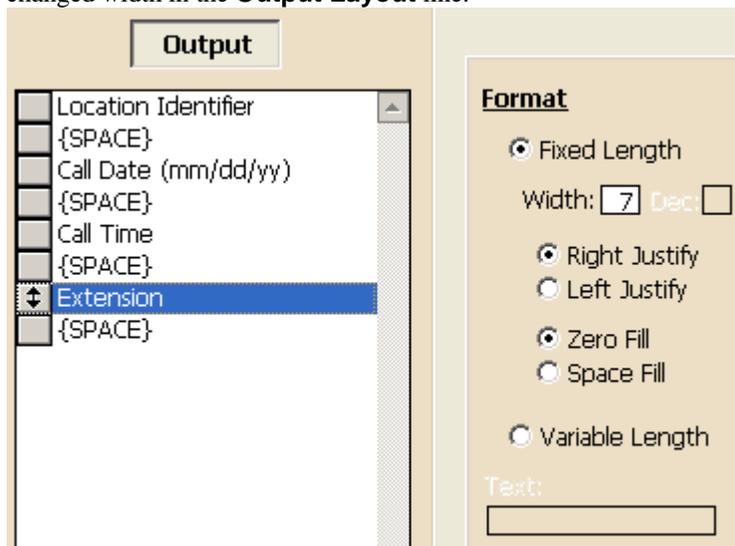
9. When finished editing you can save changes by clicking on the **Save** button on the bottom of the screen. Click on **OK** to the confirmation message.

10. Click on **Exit** to return to the **Property Management System** Screen.

To delete record format

1. You can only delete custom formats. The preexisting formats are read-only.

2. Click on the **Property Management System** toolbar icon.
   Alternately, click on **Controls → Property Management System** on the main menu. The **Property Management System** screen comes up.
   Click on the Format button next to the **Property Management System** text box.

3. The **Edit Format** screen appears. Click on the **Edit** button and select the desired custom format.

4. Click on **OK** to go back to **Edit Format** screen. The screen displays the selected format.

5. The name of the PMS custom format is displayed on the top of the screen in the **Property Management System** text box. It is read-only.

   Property Management System: trisys format

6. Click on **Delete**.

7. Click on **OK** to the confirmation message. The custom format is deleted.

8. Click on **Exit** to return to the **Property Management System** Screen.

Telephone Filter

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** box left unchecked, no costing information will apply to these calls. If you define another type of call with **Price** box checked, these 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.

1. Click on the **Telephone Filter** toolbar icon.
   Alternately, click on **Controls → Telephone Filter** on the main menu. The **Telephone Filter** screen comes up.

2. Enter any necessary dialing patterns following above.
   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:

   "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
1-203-589-1212	TTTTTTTTTTT
1-865-4156 (Intralata)	TTTTTTTT
0-865-4156	TTTTTTTT
10244-1-677-3100	10NNNTTTTTTTT
10288-1-203-589-1212	10NNNTTTTTTTTTTTT
4994-1-212-655-0909	4994TTTTTTTTTTT
(To access a specific long distance trunk, e.g., AT&Tor MCI Sprint)	01-49-81552203
(International operator assisted calls)**DO NOT CREATE ANY PATTERN**	011-49-81552203
(International calls)	**DO NOT CREATE ANY PATTERN**

3. Click on **OK** to save the changes.

Archive Calls

Archive utility moves selected call records from TALITY database to the archive file.

1. Click on the **Archive Calls** ⬢ toolbar icon.
    Alternately, click on **Controls → Archive Calls** on the main menu. The **Archive Calls** filter screen comes up.

2. If you have a filter that you would like to use click on the **Filter List** button ⎍ Filter List . Select the desired filter and click on **OK**. Notice the changes on the filter screen. Check if all the criteria are correct and click on **OK**.

3. In case you do not have a predefined filter you will have to enter archive criteria manually.
    How to use filter screen

4. Once you have entered all archive criteria you can save them as a filter for future use by clicking on **Save Filter** button ⎍ Save Filter . The **Save Filter** screen comes up. Enter a name for this filter and click on **OK**. The filter is saved.

5. When all the settings are correct click on the **OK** button to run the archive. It there are no records found for the specified criteria you will be notified with the message **No Matching Records Found**. Otherwise, TALITY will proceed with archive.

6. If you'd like to start over, click on the **Clear** button ⎍ Clear .
    All previously entered criteria are erased from the filter screen.

Export

Export utility saves Call Details, Guest/Users or Departments information outside Tality in a specified format. The available file formats are: comma delimited (*.csv), MS Excel (*.xls), and tab delimited (*.txt).

1. Click on the **Export** [icon] toolbar icon.
   Alternately, click on **Controls → Export** on the main menu. The **Export** screen comes up.

2. Make a selection from the Export list.

   Export: | Call Details | ▼ |
   - Call Details
   - Departments
   - Guests/Users
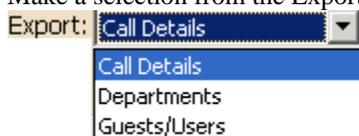
   If you select **Call Details** the filter screen icon next to the list becomes available.

   Export: | Call Details | ▼ | 🔽 |

   You can click on it and specify criteria for the calls you want to export.
   How to use the filter screen

   If you decide you do not need to filter your export data you can clear the criteria by clicking on the 🔽 icon. **Call Details** is the only option that can be filtered. Tality exports **Departments** and **Guests/Users** in their entirety.

3. Select the desired export format from the **Export File Type** list.

   Export File Type: | Comma Delimied (.csv) | ▼ |
   - Comma Delimied (.csv)
   - MS Excel (.xls)
   - TAB Delimited (.txt)
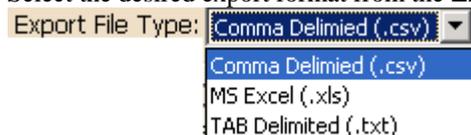
4. Enter the path to the export file into the **Export File Name** text box or click on the **Select File** button to browse for it.

5. Select the field name to be exported from the **Available** list and click on the **Add** button to transfer it to the **Selected** list. Repeat this for each export field. Clicking on **Add All** moves all field names from the **Available** list to the **Selected** list.

   To remove the field name form the **Selected** list, select the field name and click on the **Remove** button. You can also remove all field names by clicking on **Remove All**.

6. Click on **OK** to export.
   You will receive a confirmation message when export is completed. Click on **OK**.

Address Book

[@ icon]

The Address Book maintains email contact information for users and guests.

7. Click on the **Address Book** [@ icon] toolbar icon.
   Alternately, click on **Controls → Address Book** on the main menu.
   The **Address Book** screen comes up. This screen contains email information of your billing and non-billing

contacts.
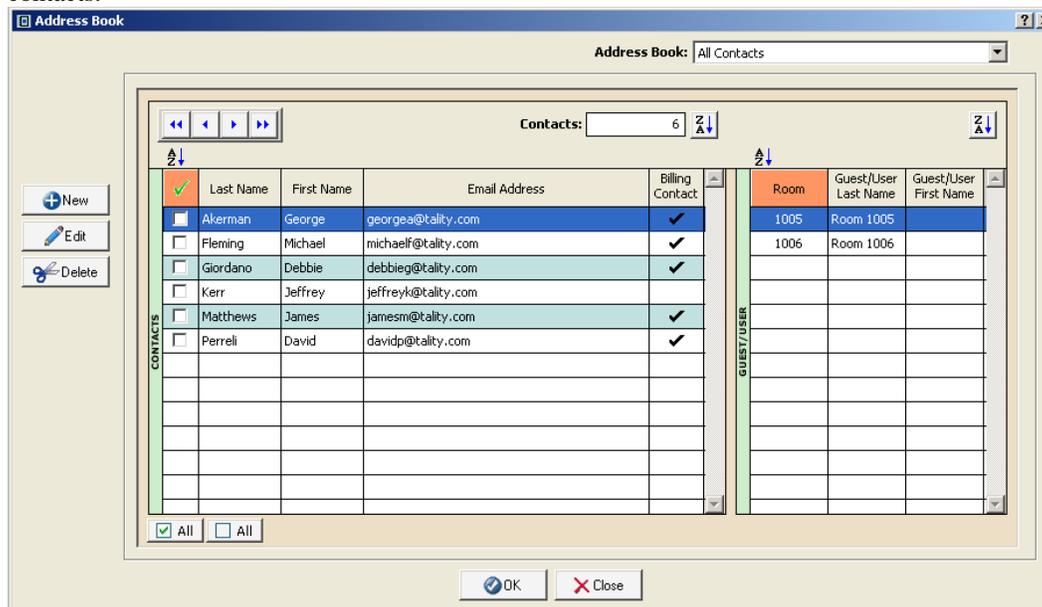
8.

You can navigate the contacts list by clicking the arrows in the upper left corner of the screen.

The count of contacts is displayed on the top of the screen. The sort order button is adjacent to it. The sort order button displays the sort order opposite to the current sort order of the list.

If you want to reverse the sort order of the list you need to click on the sort order button.

For example, the first column of the **Contacts** list indicates the current sort order is A to Z. The sort order button on the screen shot above displays Z to A.

If you want to sort the list Z to A you have to click on the sort order button. The list is sorted Z to A and the sort order button changes to A to Z.

You can sort contacts by clicking on the column headers.

For example, clicking on the **First Name** column header sorts contacts list by the **First Name** field in the currently selected direction indicated by a sort icon located above the column header.
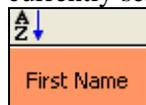
To change the sort direction click on the sort button .

Notice, the table sort order has been changed.

9. You can sort the Guest/User list (the right-hand panel) the same way.

You can select all rows of the contact list by clicking on the button. To unselect all rows, click on button.

To add a new email contact

10. Click on the **Address Book** [@] toolbar icon.
    Alternately, click on **Controls → Address Book** on the main menu.
    The **Address Book** screen comes up.

11. Click on the **New** button (the left-hand side of the screen). The **Add Contact** screen appears.

12. Enter the **First Name**, **Last Name**, and **Email Address** information.

13. If this is a guest and you would like to send billing information to his email address, check the **Billing Contact** box.

14. If **Billing Contact** is checked you need to select the rooms this guest is responsible for. To do this click on the **Rooms** button. The **Guest/User List** screen appears.
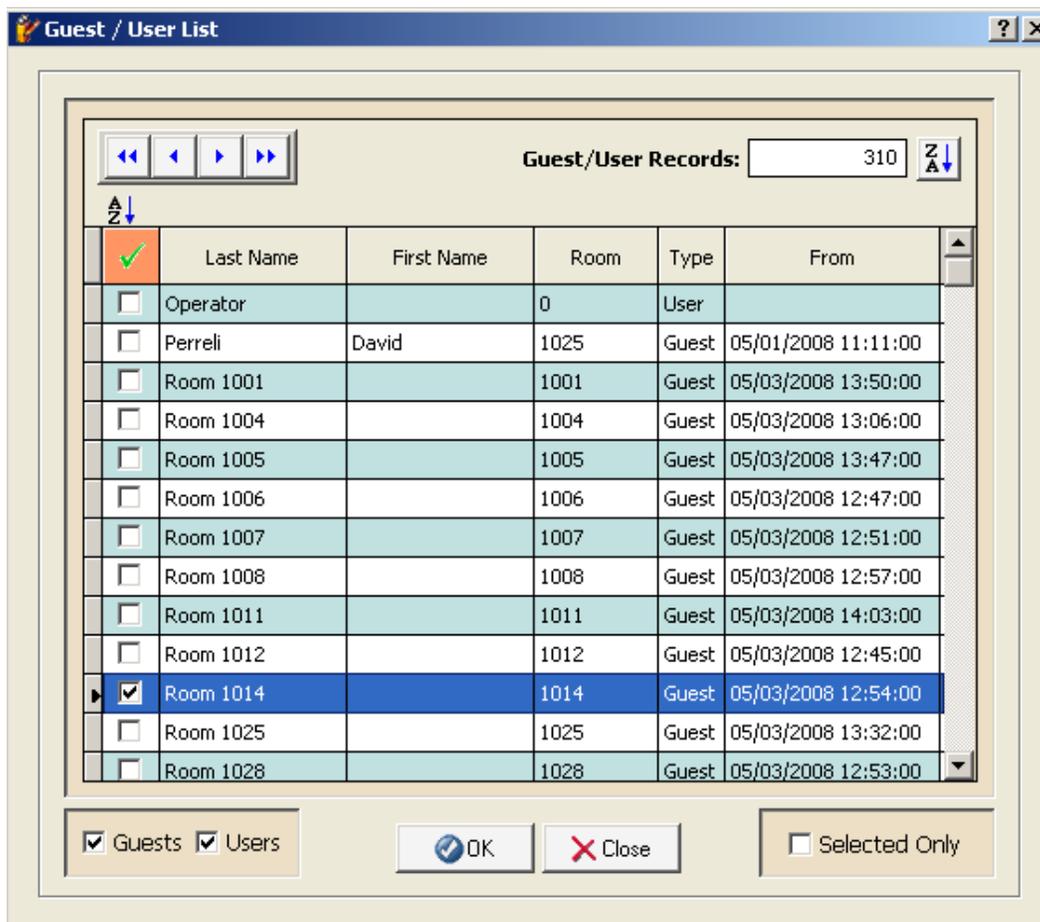
Check the boxes corresponding to the rows with desired room numbers to select them. Click on **OK**.

15. The selected room/s are listed on the **Add Contact** screen.

16. If you'd like to add another contact click on **OK…Add More** button. Otherwise, click on **OK…Done**.

To edit the email contact

1. Click on the **Address Book** toolbar icon.
   Alternately, click on **Controls → Address Book** on the main menu.
   The **Address Book** screen comes up.

Click on the row with the contact you want to change to select it.

2. Click on the **Edit** button. The **Change Contact** screen comes up.

3. Make desired changes.
   If this is a billing contact, use the **Rooms** button to add/remove room.

4. Click on the **Rooms** button.
   The **Guest/User List** screen appears.
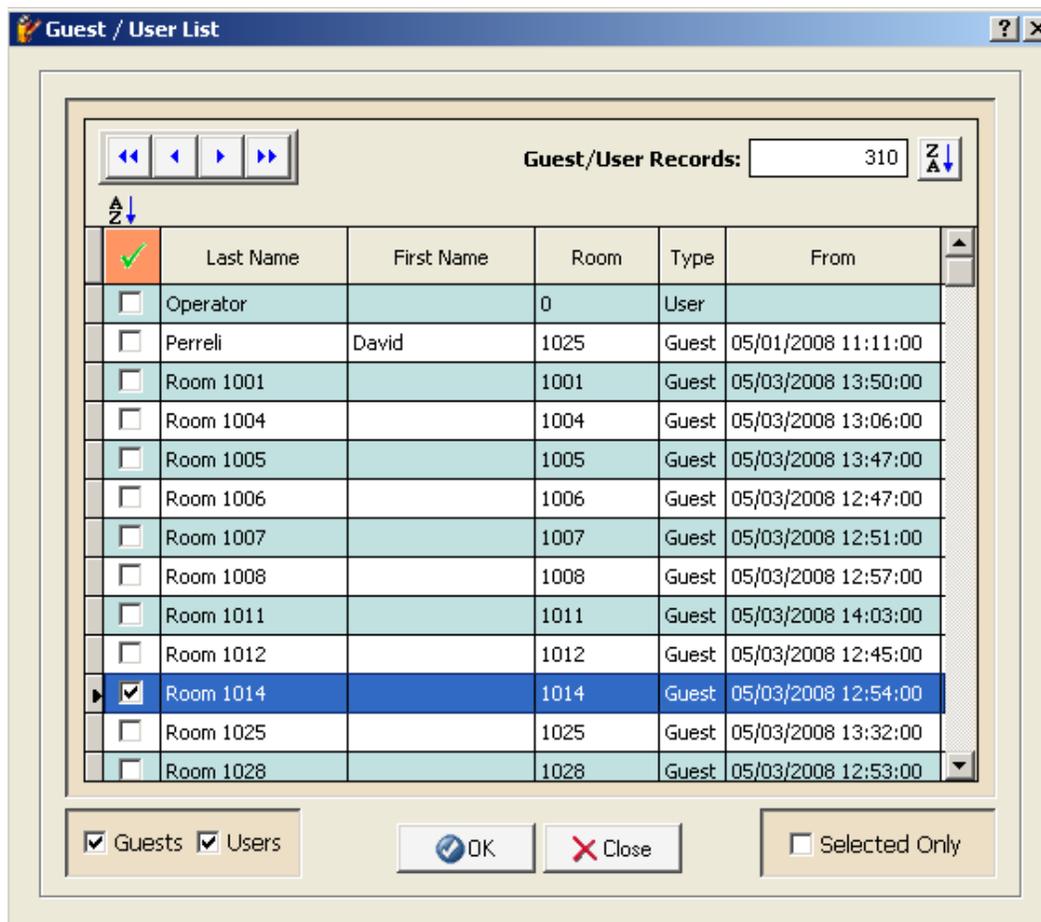
Check the boxes for the room numbers you would like to include.
Uncheck the boxes for the room numbers you would like to exclude.

5. Click on **OK**.

6. Click on **OK** to save changes back at the **Change Contact** screen.

To delete the email contact

1. Click on the **Address Book** [@] toolbar icon.
    Alternately, click on **Controls → Address Book** on the main menu.
    The **Address Book** screen comes up.

Click on the row with the contact you want to delete.

2. Click on the **Delete** button. The confirmation message appears.

3. Click **OK** to the confirmation message. The contact is deleted.

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.

To access Optimize Utility screen

1. Click on the **Optimize** toolbar icon.
   Alternately, click on **Controls → Optimize** on the main menu.
   The **Optimize** screen comes up.

2. This process requires exclusive control of TALITY files.
   Make sure all users are logged out of TALITY before you continue.
   Click on **OK**.

3. When finished the program will notify you with the message "Optimize completed".

Preferences

The **Preferences** screen lets you customize TALITY appearance. You can choose the color of background, captions, grid, insert a logo, etc..

1. Click on the **Preferences** toolbar icon.
    Alternately, click on **Controls → Preferences** on the main menu.
    The **Preferences** screen comes up.

2. Make appropriate changes. Notice they are reflected on the sample screen.

3. When finished click on **OK**.

SMDR Monitor

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 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.
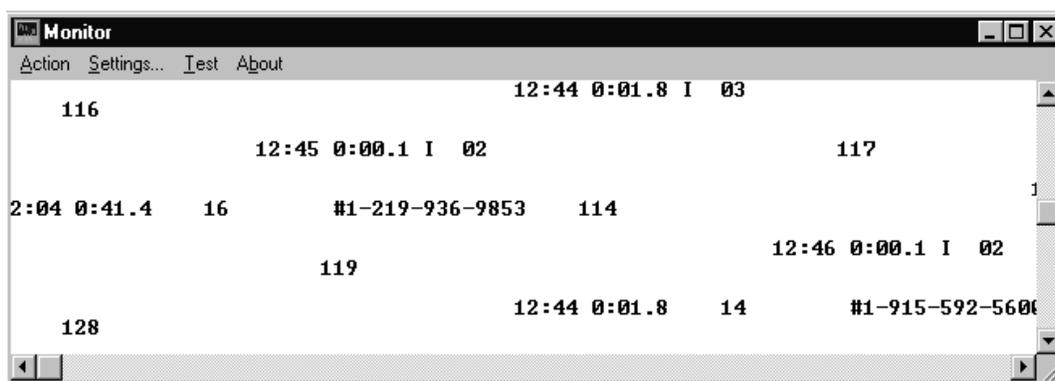
SMDR Monitor Action
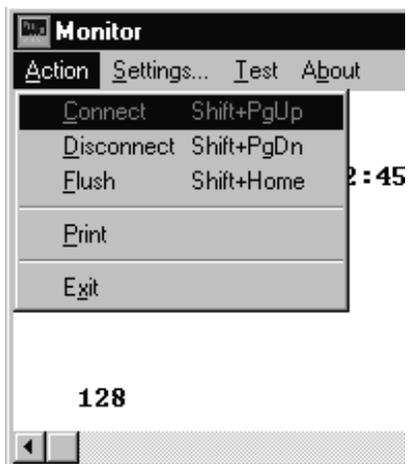
Connect - will allow you to connect to a specified serial port.

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 Monitor Settings

TALITY COM Port Options

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

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

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

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

Stop Bits - Click on the down arrow of 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 always be on the foreground of the desktop.

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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).

Testing SMDR Monitor

Load Telmsg.dat file – for test purposes Monitor can process the Telemsg.dat file residing in your TALITY directory.

Technical Support

Contact Information

You can reach Trisys Technical Support at 973-360-2300, Monday through Friday. Please have your **Tality serial number** ready when calling for tech support. Our technician may need you to email **talityerror.dbf** and **talityeror.fpt** files to troubleshoot your system. These files are located in **Tality50** folder. Please have both files handy at the time of call.

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 communicated 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.

2   OVERRUN   Character was not read from the hardware before the next character arrived. The character was lost.

512   PTO   Timeout occurred during an attempt to communicate with a

parallel device.

128   RLSDTO   RLSD (receive-line-signal-detect) timeout. While a character was being transmitted, RLSD 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   RXPARITY   Hardware detected a parity error.

256   TXFULL   Transmission queue was full when a function attempted to queue a character.

Registration

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

To register go to http://www.trisys.com/register.

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