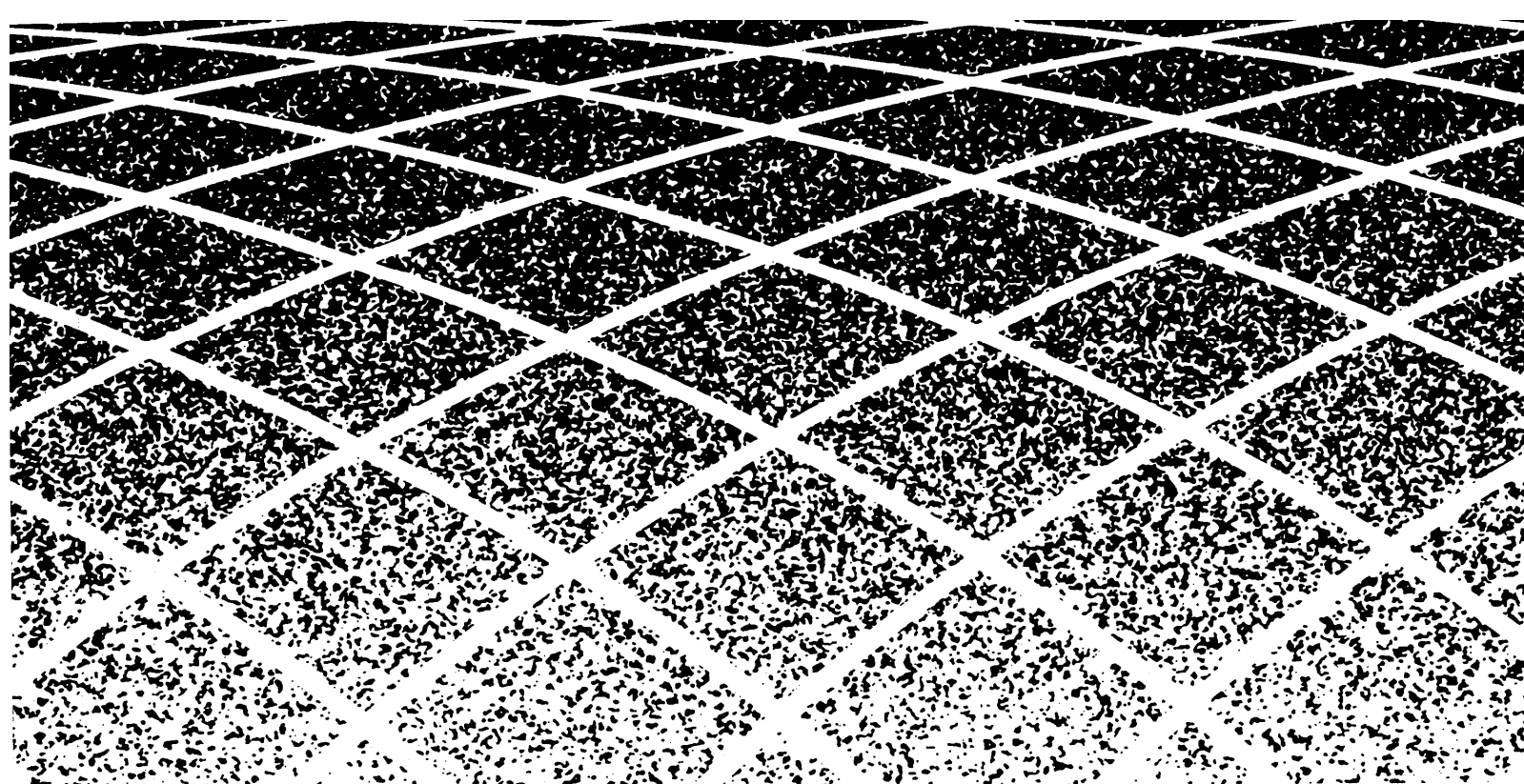




MERLIN MAIL™
Voice Messaging System
Release 2

for **MERLIN LEGEND™** Communications System
Planning Guide and Forms



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**AT&T 585-320-501
Issue 1
October 1991**

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Eastern Canada and Ottawa:	1 800 363-1882
Ontario:	1 800 387-4268
Central and Western Canada	1 800 663-9817

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About This Guide

This guide provides planning information and forms for the MERLIN MAIL™ Voice Messaging System. It is intended for use by you, the system owner, along with your AT&T support personnel, to help in planning and integrating the MERLIN MAIL system with the MERLIN LEGEND™ Communications System.

In addition to planning instructions, this guide contains blank MERLIN MAIL planning forms in Appendix A, a table of factory settings in Appendix B, a glossary of terms used in this guide, and an index.

Related Guides

The following guides are available to help you set up, use, and maintain the MERLIN MAIL system when it is installed with the MERLIN LEGEND system. The guides that are supplied with the MERLIN MAIL system are marked with an asterisk.

You can order additional copies of the related system guides listed in the following table from the AT&T Customer Information Center. Phone numbers are listed on the inside front cover.

Guide Title	Order Number
MERLIN MAIL	
System Administrator's Guide*	585-320-702
Installation, System Programming and Maintenance Guide	585-320-101
Quick Reference Card*	585-320-701
MERLIN LEGEND	
System Programming Guide	555-610-111
PBX System Planning	555-610-113
PBX System Planning Forms	555-610-117
Key System Planning	555-610-112
Key System Planning Forms	555-610-116

* Shipped with MERLIN MAIL system.

Introduction

1

Use this Planning Guide and the planning forms to plan and configure the MERLIN MAIL™ Voice Messaging System with the MERLIN LEGEND™ Communications System. Before you begin to plan the system, read through this guide for information on what planning you must do.

When planning the voice messaging system, you must work closely with the MERLIN LEGEND System Manager to coordinate the programming. (In many companies, the System Administrator for the MERLIN MAIL system and the System Manager for the MERLIN LEGEND system are the same person.) It is essential that the two systems work together as an integrated unit.

MERLIN LEGEND planning is the initial step. The *MERLIN LEGEND (PBX or Key) System Planning Guide* provides the planning forms for setting up the MERLIN LEGEND system. You will need to obtain the MERLIN LEGEND planning forms and make copies for your use in planning the integration with the MERLIN MAIL system. Note that the MERLIN LEGEND system can work with the MERLIN MAIL system in either the hybrid/PBX mode or the key mode. Make sure you have the planning forms that match your system.

Chapter 1 of this Planning Guide describes the many features available with the MERLIN MAIL Voice Messaging System. Keep in mind that your company's needs dictate how you plan to use this flexible system. Determine which features you want to implement for your company and then move on to Chapter 2, which leads you through the process of filling out the MERLIN LEGEND system planning forms needed to integrate the MERLIN MAIL system.

Once you determine the essential MERLIN LEGEND information, then complete the MERLIN MAIL system planning forms found in Chapter 3.

You need to fill out the planning forms before AT&T personnel can install the MERLIN MAIL system and program it to work with the MERLIN LEGEND system.

System Features

Before you can begin to fill in the planning forms, you must consider how your company wants to use the MERLIN MAIL system, Figure 1-1 provides an overview of the services available through the MERLIN MAIL system. Read the following descriptions of Automated Attendant, Call Answer Service, Voice Mail Service and the related features; then keep in mind the type of service and features your company needs as you fill out the planning forms.

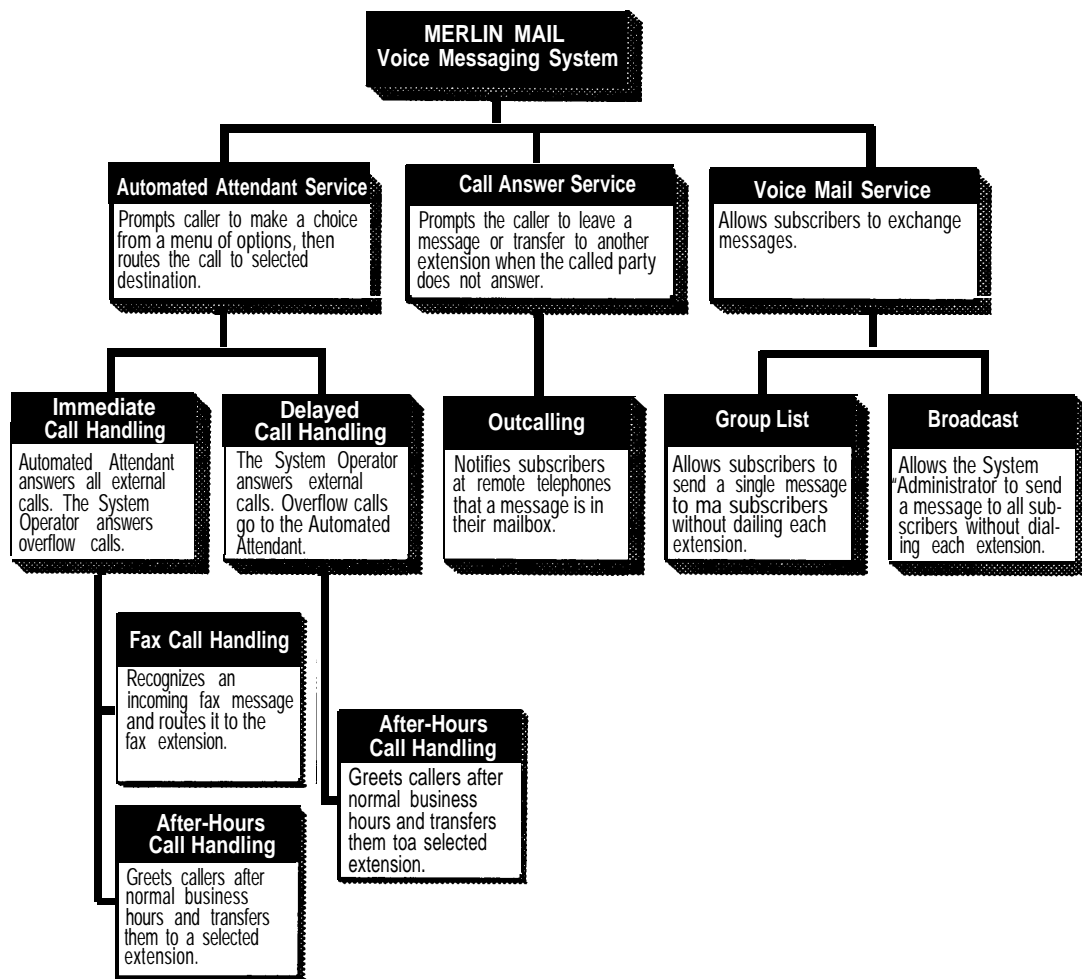


Figure 1-1. Overview of MERLIN MAIL Services

Automated Attendant

The Automated Attendant Service consists of an announcement and a multi-level menu, providing callers with a number of options that allow them to quickly get an extension, a department, or information by pressing a single digit. This service provides several major benefits, both to the callers and to the company:

- Calls are efficiently routed to the correct party.
- If the party the caller wants does not answer or the phone is busy, the caller is prompted to leave a message or try another extension.
- If the caller does not know the extension needed, he or she can access the directory.
- Announcements of frequently requested information (such as directions or business hours) can be included as menu options, thereby freeing an employee's time for other tasks.

The following is an example of a typical Automated Attendant menu that allows a caller to quickly get the extension he or she wants:

*Good afternoon, thank you for calling the XYZ Company.
For sales, press [1].*

For customer service, press [2].

If you know the extension of the person you are calling, press [5] and dial the extension now.

If you do not know the extension you need, press [x] and [A] to hear the extensions available, listed by last names.

Or stay on the line for assistance.

The following is an example of a more complex Automated Attendant menu that includes submenus and prerecorded announcements:

*Good afternoon, you have reached the ANY City Zoo.
For current rates, press [1].*

For special events, press [2].

For ticket information, press [3].

For directions, press [4].

If you know the extension of the person you are calling, press [5] and dial that person's extension.

Or press [0] for operator assistance.

Assuming that the caller needs directions to the zoo and presses [4], the following submenu is played to the caller:

If you are coming by subway, press [1].

If you are coming by bus, press [2].

If you are coming by car, press [3].

If you are walking, press [4].

After the caller makes a selection, the next menu tier might ask the caller to enter the direction he or she is coming from and would then play the requested directions.

This multi-tiered menu approach is useful for many businesses, such as banks, insurance agencies, post offices, and department stores. For example, an Automated Attendant could be used in the stock brokerage business. A multi-tier menu allows clients to select recordings of specific information they need, such as current quotes on stocks in their portfolio or current interest rates on money market funds, or to wait for an available broker.

The menu allows brokers to handle customers placing orders instead of being tied up reciting repetitive information. In a business like this, the Automated Attendant should always be programmed to allow the caller to stay on the line or enter an extension to reach a broker.

Call Handling Methods

The Automated Attendant can be set to handle calls in one of two ways: Immediate Call Handling or Delayed Call Handling.

Immediate Call Handling

With Immediate Call Handling, Automated Attendant answers every external call by playing the Automated Attendant Greeting and the Main Menu. Calls from rotary phones (which cannot use the menu) or callers requesting assistance will automatically be transferred to the System Operator.

Overflow calls will be answered by the System Operator, as shown in Figure 1-2.

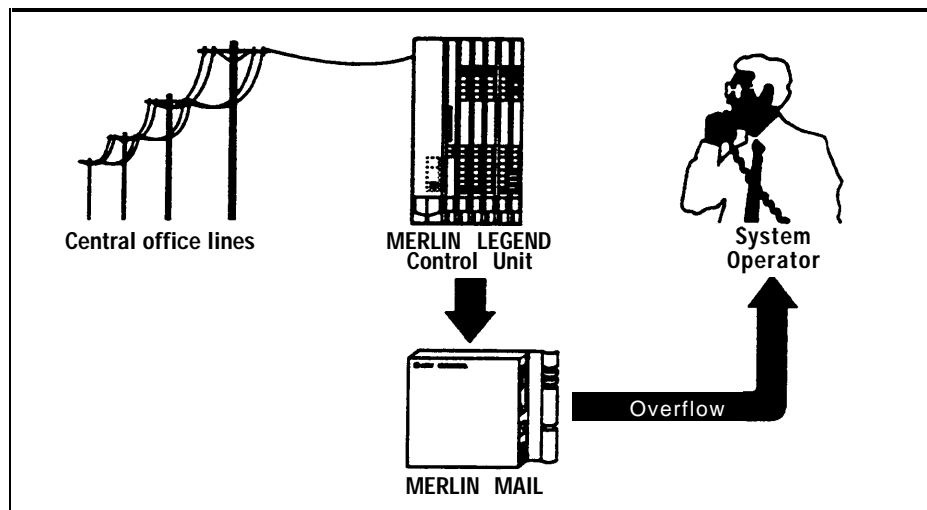


Figure 1-2. MERLIN MAIL System as Immediate Call Handler

The MERLIN MAIL system provides the following two additional features:

- *Fax Call Handling*— MERLIN MAIL is capable of receiving fax calls and transferring them to a designated extension. Fax call handling can be combined only with Immediate Call Handling.
- *After-Hours Call Handling*— The Automated Attendant also provides Night Service for calls received after business hours. Calls to individuals with Night Service coverage are answered by the Automated Attendant, which gives the caller the option of placing a message in a Mailbox. The MERLIN LEGEND system is programmed to switch between day and night mode at the times the System Manager specified (see the *MERLIN MAIL System Administrator's Guide* for instructions). After-Hours Call Handling can be combined with either Immediate or Delayed Call Handling.

Delayed Call Handling

With Delayed Call Handling, external calls ring at the System Operator's console. If the System Operator does not answer within a preset number of rings, or if the console is busy, the call automatically goes to the Automated Attendant, as shown in Figure 1-3. The System Administrator determines the number of times the phone will be allowed to ring before switching to the Automated Attendant (see the *MERLIN MAIL System Administrator's Guide* for instructions).

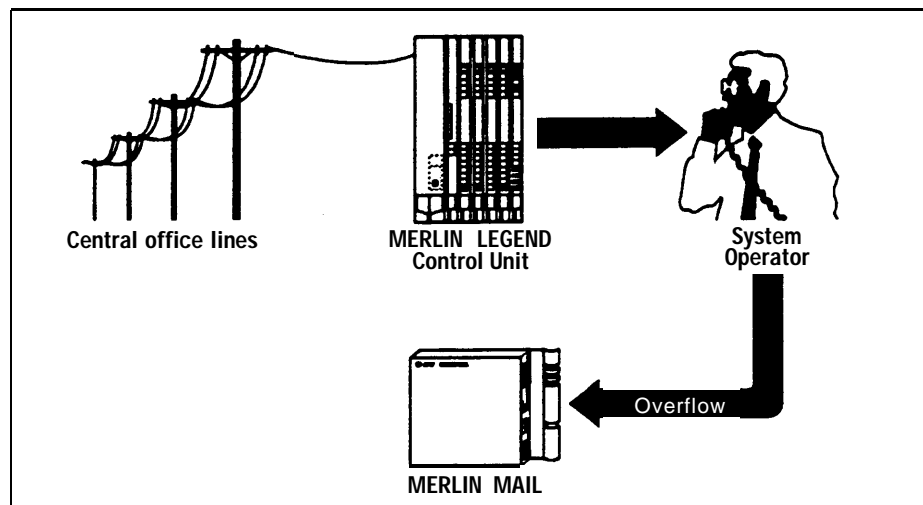


Figure 1-3. MERLIN MAIL System as Delayed Call Handler

Call Answer Service

The Call Answer Service allows callers to leave messages or transfer to another extension when the extension called is busy or not answered. When a message is left, Call Answer deposits the message in the called person's mailbox, then lights the message-waiting indicator on the called party's phone. Subscribers with the Outcalling feature can also have the system call an off-site telephone, to inform the subscriber that a new message has arrived in his or her mailbox.

in addition to acting as an answering machine, Call Answer Service enables callers to perform any of the following functions:

- Dial 0 for the System Operator
- Transfer to another extension
- Review and edit messages before depositing them in the mailbox.

Call Answer Service is useful to sales representatives who rely exclusively on the telephone, are on the road during the day, and may be unavailable much of the time. With Call Answer, potential clients can leave detailed messages in the salesperson's mailbox. The salesperson can then retrieve the message at his or her convenience and get back to the client.

Outcalling

The Outcalling feature allows subscribers at a remote telephone to be notified when a message is in their mailbox. Individual subscribers who have the Outcalling feature can change their outcalling number through the Voice Mail Service.

Outcalling is particularly useful because it allows businesspeople on the road or at an alternate work location to be notified immediately by car phone, beeper, or telephone that there are messages in their mailbox, and enables them to retrieve their messages.

Voice Mail Service

The Voice Mail Service allows subscribers (people registered on the MERLIN MAIL system) to:

- Create a message and send it to one or more subscribers
- Receive messages from other subscribers
- Receive a message and forward it to one or more subscribers, with additional comments, if desired
- Record their own personal greetings and names
- Assign their own passwords, which they can change at any time to ensure that messages are kept confidential.

The following features enable subscribers to send and receive messages:

Group Lists

Group Lists give subscribers the ability to send a single message to multiple subscribers without dialing each extension. This feature is useful in many different situations. Following are some examples:

- A sales manager can send a single message to a group of sales personnel who are often traveling and hard to reach by telephone.
- A faculty department chairperson can send a message to department members, not all of whom are on campus on the same day.
- A hospital or plant administrator can send a message to a group of personnel who work different shifts.

Group Lists are created and updated by the System Administrator. See the *MERLIN MAIL System Administrator's Guide* for programming instructions.

Broadcast Message

Broadcast Message is a time-saving feature that allows the System Administrator to send a message to all subscribers without having to dial each subscriber's extension.

Planning Forms

After you have determined which MERLIN MAIL system features you want, you must complete the MERLIN LEGEND planning forms and the MERLIN MAIL planning forms. These forms are used to record and verify the required settings needed to program the MERLIN MAIL and MERLIN LEGEND systems.

MERLIN LEGEND Forms

The MERLIN LEGEND planning forms have already been filled out for the MERLIN LEGEND Communications system. Update these forms to include MERLIN MAIL system features, following the instructions in Chapter 2 of this guide, and refer to them for information required on some MERLIN MAIL planning forms. Be sure to coordinate the additions and changes with the MERLIN LEGEND System Manager. Photocopy the completed MERLIN LEGEND forms and place the copies in the back cover pocket of the *MERLIN MAIL System Administrator's Guide*.

You need to update and verify information on ten MERLIN LEGEND planning forms. These forms are listed at the beginning of Chapter 2.

MERLIN MAIL Forms

Fill out the blank MERLIN MAIL planning forms (located in Appendix A of this guide) after you have determined which MERLIN MAIL system feature you want, and have completed the MERLIN LEGEND planning forms. Be sure to first photocopy the blank forms and retain the originals for future changes. After completing the forms, fold both the completed forms and the blank forms and insert them in the back cover pocket of the *MERLIN MAIL System Administrator's Guide*.

You must complete nine MERLIN MAIL planning forms. These forms are listed at the beginning of Chapter 3.

MERLIN LEGEND Planning

2

General Instructions

It is essential that the MERLIN MAIL Voice Messaging System be properly integrated with the MERLIN LEGEND Communications System. This requires careful planning of both systems. This chapter describes how to update the MERLIN LEGEND planning forms to integrate the two systems.

Locate the correct MERLIN LEGEND planning forms. Be sure that the forms indicate the mode of your MERLIN LEGEND system. To determine which system mode (hybrid/PBX or key) you have, look on the back of MERLIN LEGEND Form 1: System Planning under the heading *Set System Mode*.

The MERLIN LEGEND forms you need are listed below:

- Form 2a: System Numbering—Station Jacks
- Form 2c: System Numbering—Trunk Jacks
- Form 2d: System Numbering—Special Renumbers
- Form 4a: Analog Multiline Telephone
- Form 4b: Digital/ISDN (MLX) Telephone
- Form 6d: Group Coverage
- Form 6e: Group Calling
- Form 6f: System Features
- Form 7a: Night Service—Group Assignment
- Form 7b: Night Service—Outward Restriction
- Form 8b: Label Form—Stations and Calling Groups

Store copies of the completed forms in the pocket of the back cover of the *MERLIN MAIL System Administrator's Guide*. Make sure that the original forms with updates are returned to the MERLIN LEGEND System Manager.

MERLIN LEGEND Form 2a: System Numbering—Station Jacks

MERLIN LEGEND Form 2a identifies current extension assignments for individuals and functions at the company. For each extension, it indicates the MERLIN LEGEND jack type (analog, digital, or basic telephone), jack number (logical ID), whether the extension is a 2-digit or 3-digit type, and set-up space (used for assigning 1- or 4-digit extensions).

Add the following applicable information to Form 2a to reflect the addition of the MERLIN MAIL system to the MERLIN LEGEND system:

① **MERLIN MAIL ports**

For each MERLIN LEGEND jack connected to a MERLIN MAIL port, check the Jack Type as "B" and write MERLIN MAIL Port 1, 2, and soon in the *Person, Location, or Function* column for that jack. Match the lowest numbered logical ID to the lowest numbered MERLIN MAIL port, the next higher ID to the next higher port, and so on, sequentially matching the IDs with the ports.

② **Remote Maintenance Device (modem) connection**

Identify the jack to which the MERLIN MAIL Remote Maintenance Device (RMD) will be connected. Check the Jack Type as "B" and write MERLIN MAIL RMD in the *Person, Location, or Function* column.

③ **Fax connection**

Identify the jack to which the fax machine will be connected. Check the Jack Type as "B" and write "fax" in the *Person, Location, or Function* column. If you are connecting more than one fax machine, repeat this step until all jacks for fax machines have been identified.

④ **Call Handling Methods**

Indicate extension assignments for any of the following MERLIN MAIL services that you have selected.

■ **Delayed Call Handling Extension**

Select an unused multiline extension (phone with line buttons) and write "Delayed Call Handling" in the *Person, Location, or Function* column. Check the Jack Type as "A" or "D."

■ **After-Hours Call Handling Extension**

This step applies only if the Automated Attendant Service will not be used during the day. Select an unused multiline extension (phone with line buttons) and write "After-Hours Call Handling" in the *Person, Location, or Function* column. Check the Jack Type as "A" or "D."

PBX System Form 2a

System Numbering — Station Jacks

Renumber System

- 2-Digit ♦
- Selected extension numbers
- 3-Digit
- Set Up Space

Logical ID	Jack Type			2-Digit Ext. No. ♦	3-Digit Ext. No.	Set Up Space	Renumber To	Person, Location, or Function
	A	D°	B					
1		✓		10	100	7100		Pat H. System Operator
2		✓		11	101	7101		Joanne R.
3		✓		12	102	7102		Janet S.
4		✓		13	103	7103		Pam P.
5		✓		14	104	7104		Lou L.
6		✓		15	105	7105		Amy S.
7		✓		16	106	7106		Tony F.
8		✓		17	107	7107		Susan P.
9			✓	18	108	7108		MERLIN MAIL Port 1
10			✓	19	109	7109		MERLIN MAIL Port 2
11			✓	20	110	7110		MERLIN MAIL Port 3
12			✓	21	111	7111		MERLIN MAIL Port 4
13			✓	22	112	7112		MERLIN MAIL RMD
14			✓	23	113	7113		FAX
15			✓	24	114	7114		FAX
16				25	115	7115		
17				26	116	7116		
18				27	117	7117		
19				28	118	7118		
20				29	119	7119		
21	✓			30	120	7120		Delayed Call Handling
22	✓			31	121	7121		After-Hours Call Handling
23				32	122	7122		
24				33	123	7123		
25				34	124	7124		
26				35	125	7125		
27				36	126	7126		
28				37	127	7127		
29				38	128	7128		
30				39	129	7129		



° Use Form 2b for adjuncts connected via MFM a 7500B Data Module
 Shaded lines indicate possible operator positions
 ♦ Factory Setting

Figure 2-1. MERLIN LEGEND Form 2a

MERLIN LEGEND Form 2c: System Numbering—Trunk Jacks

Use MERLIN LEGEND Form 2c to verify that loop-start lines on the MERLIN LEGEND system are set to “reliable.” Loop-start lines must be set to “reliable” so that calls will be properly disconnected.

① **Loop-Start Reliable Disconnect**

Verify that the “Yes” box is checked, indicating you have loop-start lines (LS) that have a reliable disconnect signal.

PBX System Form 2c

System Numbering — Trunk Jacks

Music-on-Hold, Logical ID _____ Source _____ Maintenance Alarm, Logical ID _____

Loudspeaker Page, Logical ID _____ Loop-Start Reliable Disconnect
 No Yes ①

Logical ID	Jack Type (LS,GS, DID,Tie, DSI)	Trunk Number	Trunk Type (Basic LS, Basic GS, WATS,FX, etc.)	Telephone Numbs or Equipment	Outmode Rotary Dial		Toll Prefix Not Needed for LD		Short Hold Disconnect Interval		QCC Operator to Receive Calls (No ♦)	QCC Queue Priority Level (4 ♦)
					Yes	No ♦	Yes	No ♦	Yes	No ♦		
1	LS	801	Basic LS	555-1200								
2	LS	802	Basic LS	555-1201								
3	LS	803	Basic LS	555-1202								
4	LS	804	Basic LS	555-1203								
5	LS	805	Basic LS	555-1204								
6	LS	806	Basic LS	555-1205								
7	LS	807	Basic LS	555-1206								
8	LS	808	Basic LS	555-1207								
9		809										

Figure 2-2. MERLIN LEGEND Form 2c

MERLIN LEGEND Form 2d: System Numbering—Special Renumbers

Use MERLIN LEGEND Form 2d to identify the designated Calling Groups. This example shows a Calling Group for the MERLIN LEGEND system and for the fax machines. The Group Calling number is needed when you fill out MERLIN LEGEND Form 6e.

① **Group Calling**

Identify the MERLIN LEGEND Group Calling number for:

- The MERLIN LEGEND Calling Group
- Fax machines (if you have more than 1).

PBX System Form 2d

System Numbering — Special Renumbers

	Group Calling (Form 6e) Group ID	Factory-Set Number	Renumber To																																					
①	25 (MERLIN LEGEND)	770		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Pools (Form 3b) Description</th> <th style="width: 15%;">Factory-Set Number</th> <th style="width: 15%;">Renumber To</th> </tr> </thead> <tbody> <tr><td></td><td>70</td><td></td></tr> <tr><td></td><td>890</td><td></td></tr> <tr><td></td><td>891</td><td></td></tr> <tr><td></td><td>892</td><td></td></tr> <tr><td></td><td>893</td><td></td></tr> <tr><td></td><td>894</td><td></td></tr> <tr><td></td><td>895</td><td></td></tr> <tr><td></td><td>896</td><td></td></tr> <tr><td></td><td>897</td><td></td></tr> <tr><td></td><td>898</td><td></td></tr> <tr><td></td><td>899</td><td></td></tr> </tbody> </table>	Pools (Form 3b) Description	Factory-Set Number	Renumber To		70			890			891			892			893			894			895			896			897			898			899	
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Group Paging (Form 6c) Group ID	Factory-Set Number	Renumber To

Figure 2-3. MERLIN LEGEND Form 2d

MERLIN LEGEND Form 4a or 4b

Complete MERLIN LEGEND Form 4a or 4b if you have either of the following services:

- Automated Attendant Service with Delayed Call Handling
- Automated Attendant Service with After-Hours Call Handling

Form 4a (for analog telephones) and Form 4b (for digital telephones) are used to identify information about the telephones. Which form you use depends on the type of telephone you are connecting. A separate form is required for each individual telephone connecting to the MERLIN LEGEND system, so you may have some of each type.

For the MERLIN LEGEND Automated Attendant to work in the Delayed Call Handling or After-Hours Call Handling modes, an unused multiline extension must be identified as a Delayed Call Handling or After-Hours Call Handling Group Coverage Extension.

Delayed Call Handling

If you want the MERLIN MAIL Automated Attendant to work in Delayed Call Handling mode, you must assign a Delayed Call Handling extension. This must be an unused multiline extension. You selected this extension on MERLIN LEGEND Form 2a. It can be either an analog or digital phone. The example illustrates an analog phone. Assign the Delayed Call Handling only if the Automated Attendant Service will not be used during the day. Fill in the following information for the Delayed Call Handling extension:

- ① **Logical ID**
Write the corresponding Logical ID (jack number) for this extension.
- ② **Extension No.**
Write the Delayed Call Handling extension number.
- ③ **Person or Location**
Write "Delayed Call Handling" in the space provided.

Page ___ of ___

PBX System Form 4a

Analog Multiline Telephone

① *Make copy for each telephone.* ② Logical ID 21 Extension No. 30 Person or Location Delayed Call Handling ③

Station Jack Pair

- Voice Announce to Busy (voice/voice)
- Simultaneous Voice and Data (voice/data)
Even-numbered jack
Logical ID _____ Ext. No. _____

Telephone Model

- MLC-5 BIS-22D
- BIS-10 BIS-34
- BIS-22 BIS-34D
- Other _____

Adjuncts

- General Purpose Adapter

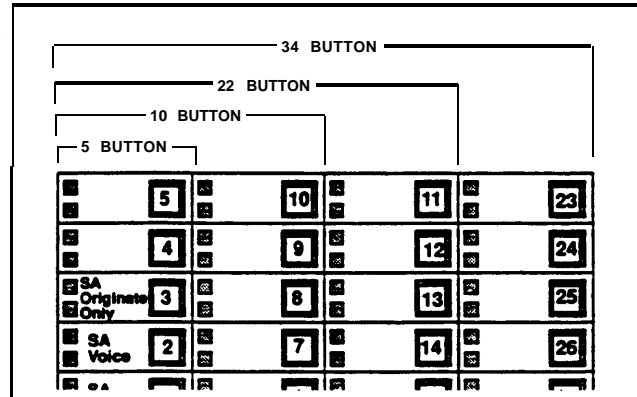


Figure 2-4. MERLIN LEGEND Form 4a

After-Hours Call Handling

If you want the MERLIN MAIL Automated Attendant to work in After-Hours Call Handling mode, you must assign an After-Hours Call Handling extension. This must be an unused multiline extension. You selected this extension on MERLIN LEGEND Form 2a. It can be either an analog or digital phone. The example illustrates a digital phone. Fill in the following information for the After-Hours Call Handling extension:

- ① **Logical ID**
Write the Logical ID (jack number) for this extension.
- ② **Extension No.**
Write the After-Hours Call Handling extension number.
- ③ **Person or Location**
Write "After-Hours Call Handling" in the space provided.

Page ____ of ____

PBX System Form 4b

Digital/ISDN (MLX) Telephone

Make copy for each telephone

① Logical ID 22 ② Extension No. 31 ③ Person or Location After-Hours Call Handling

<p>Telephone Model</p> <p><input type="checkbox"/> MLX-20L™</p> <p><input type="checkbox"/> MLX-28D™</p> <p><input type="checkbox"/> MLX-10D™</p> <p><input type="checkbox"/> MLX-10™</p>	<p>Adjuncts</p> <p><input type="checkbox"/> Headset</p> <p><input type="checkbox"/> Hearing-impaired handset</p> <p><input type="checkbox"/> Noisy environment</p> <p><input type="checkbox"/> Multi-Function Module (MFM) Extension No. _____</p> <p style="margin-left: 20px;"><input type="checkbox"/> Fax machine</p> <p style="margin-left: 20px;"><input type="checkbox"/> Answering machine</p> <p style="margin-left: 20px;"><input type="checkbox"/> Data terminal</p> <p style="margin-left: 20px;"><input type="checkbox"/> Alert device, type _____</p> <p style="margin-left: 20px;"><input type="checkbox"/> Other _____</p>
--	---

Figure 2-5. MERLIN LEGEND Form 4b

MERLIN LEGEND Form 6d: Group Coverage

Use MERLIN LEGEND Form 6d to create coverage groups. When a call to an extension (sender) in a coverage group is unanswered or busy, the call is transferred to an extension (designated receiver) in a specified Calling Group. There is no limit on the number of extensions in a coverage group. A Calling Group can be shared among the following different MERLIN MAIL services:

- Delayed Call Handling
- After-Hours Call Handling
- Call Answer Service

Sample Form 6d shows a shared Coverage Group (Group No. 1) for the services listed above. If a call to any extension in Coverage Group 1 is unanswered, it will be transferred to extension 770, the MERLIN MAIL Calling Group.

Delayed Call Handling

- ① **Sender Group No.**
Have the MERLIN LEGEND System Manager supply a group number for the Delayed Call Handling Group Coverage. Write that number here. Group numbers run from 1 to 30.
- ② **Extension Nos.**
Write the Delayed Call Handling extension identified on MERLIN LEGEND Form 2a in this column.
- ③ **Receivers' Extension Nos.**
Write the MERLIN MAIL (Integrated VMI) *Group Calling Group ID* number from MERLIN LEGEND Form 2d.

After-Hours Call Handling

Assign a coverage group for After-Hours Call Handling *only* if the Automated Attendant Service will not be used during the day.

- ① **Sender Group No.**
Have the MERLIN LEGEND System Manager supply a group number for the After-Hours Call Handling Group Coverage. Write that number here. Group numbers run from 1 to 30.
- ② **Extension Nos.**
Write the After-Hours Call Handling extension identified on MERLIN LEGEND Form 2a.
- ③ **Receivers' Extension Nos.**
Write the MERLIN MAIL (Integrated VMI) *Group Calling Group ID* number from MERLIN LEGEND Form 2d.

Call Answer Service

- ① **Sender Group No.**
Have the MERLIN LEGEND System Manager supply a group number for the Call Answer Service Group Coverage. Write that number here. Group numbers run from 1 to 30.
- ② **Extension Nos.**
Write the extension numbers for all the subscribers who need Call Answer Service.
- ③ **Receivers' Extension Nos.**
Write the MERLIN MAIL (Integrated VMI) *Group Calling Group ID* number from MERLIN LEGEND Form 2d.

PBX System Form 6d, Continued

	Sender Group No. <u>1</u>	Sender Group No. _____	Sender Group No. _____	Sender Group No. _____
①	Group No.	Group No.	Group No.	Group No.
②	Extension Nos.	Extension Nos.	Extension Nos.	Extension Nos.
	11			
	12			
	13			
	14			
	15			
	16			
	17			
	30 (Delayed Call Handling Extension)			
	31 (After-Hours Call Handling Extension)			

	Receivers* Extension Nos.	Receivers* Extension Nos.	Receivers* Extension Nos.	Receivers* Extension Nos.
③	Extension Nos.	Extension Nos.	Extension Nos.	Extension Nos.
	1 770	1	1	1
	2	2	2	2
	3	3	3	3
	4	4	4	4
	5	5	5	5
	6	6	6	6
	7	7	7	7
	8	8	8	8
	QCC queue	QCC queue	QCC queue	QCC queue

* A maximum of 8 multiline telephones can be used as receivers. The QCC queue can also be a receiver, but it is not counted in the 8 receiver maximum. If a calling group is the receiver, it must be the only receiver for a coverage group.

Figure 2-6. MERLIN LEGEND Form 6d

MERLIN LEGEND Form 6e: Group Calling

Use MERLIN LEGEND Form 6e to create an Integrated VMI (MERLIN MAIL) Calling Group or a Calling Group for faxes if you have more than one fax machine (shown in the second example for Form 6e). You can have from 1 to 32 Calling Groups, and will need a separate copy of Form 6e for each group. Make sufficient photocopies before starting to fill out this two-page form.

Designated extensions in the Calling Group act as receivers for unanswered calls forwarded from group coverage. Use Form 6e for all services. You will need MERLIN LEGEND Form 2d to locate group numbers and extension numbers.

Integrated VMI Calling Group

Page 1:

- ① **Group No.**
Write the MERLIN MAIL Group Calling Number here and at the top of Page 2 of this form. The Group Number should be the next available Group Calling Number on MERLIN LEGEND Form 2d. The MERLIN LEGEND System Manager can determine that number for you.
- ② **Group ID**
Identify the group as Integrated VMI or MERMAIL, whichever name is more meaningful to your company,
- ③ **Factory-Set Ext. No.**
Write the factory-set extension number here. The MERLIN LEGEND System Manager can supply this number for the Calling Group, using the number in the *Factory-Set Number* column of Form 2d.
- ④ **Renumber To:**
If the extensions for the MERLIN LEGEND system have been renumbered, write the renumbered extension here. This number is also supplied on MERLIN LEGEND Form 2d.
- ⑤ **Stations**
 - *Ext. No.* —Enter the extension (jack) numbers that the MERLIN MAIL system should be connected to. This will be either two or four extensions, depending on the number of ports on the MERLIN MAIL system. These are the extensions identified as VMI or MERLIN MAIL ports on MERLIN LEGEND Form 2a.
 - *Person or Location* —Identify the extensions as Integrated VMI or MERLIN MAIL ports.

- ⑥ **TRUNKS** (Immediate Call Handling Only)
 If the MERLIN MAIL Automated Attendant is to be the immediate (primary) call handler, you need to enter the number of the trunks (lines) that should ring immediately at the Calling Group. The MERLIN LEGEND System Manager can help determine these numbers.

In the Trunks section, write the number for each line or pool in the column labeled *Trunk No.* The numbers under *Logical ID* identify the corresponding jack connections on the MERLIN LEGEND processor.

PBX System Form 6e

Group Calling

Maximum: 32 groups. Make a copy for each group.

- ① — Group No. (1-32) 25 Group ID MERMAIL ②
- ③ — Factory-Ser Ext. No. 770 Renumber To _____
- ⑤ — Stations ④

	Ext. No.	Person or Location		Ext. No.	Person or Location		Ext. No.	Person or Location		Ext. No.	Person or Location
1	<u>18</u>	<u>MM Port 1</u>	6			11			16		
2	<u>19</u>	<u>MM Port 2</u>	7			12			17		
3	<u>20</u>	<u>MM Port 3</u>	8			13			18		
4	<u>21</u>	<u>MM Port 4</u>	9			14			19		
5			10			15			20		

- ⑥ — Trunks

Logical ID	Trunk No.	Logical ID	Trunk No.	Logical ID	Trunk No.	Logical ID	Trunk No.
1	<u>B01</u>	21	<u>B21</u>	41		61	
2	<u>B02</u>	22	<u>B22</u>	42		62	
3	<u>B03</u>	23		43		63	
4	<u>B04</u>	24		44		64	
5	<u>B05</u>	25		45		65	
6	<u>B06</u>	26		46		66	

Figure 2-7. MERLIN LEGEND Form 6e, Page 1

Page 2:

⑦ Group No.

Write in the same Group No, that you used on Page 1 of this form, if you have not already done so.

⑧ Group ID

Write in the same Group ID that you used on Page 1 of this form, if you have not already done so.

⑨ Hunt Type

Check the box marked *Linear*.

⑩ Overflow Coverage

You can provide backup coverage for a Calling Group by designating another Calling Group to receive unanswered calls when the number of calls waiting exceeds a certain level. If you have a hybrid/PBX system, you can designate a QCC (Queued Call Console) operator position to receive overflow calls.

- If you want to designate a Calling Group for Overflow Coverage, write the Calling Group number in the space provided.
- If you want the QCC operator to handle Overflow Coverage, check the box labeled *QCC*.

⑪ Overflow Threshold

You can also change the Overflow Threshold from the factory setting of "1" by writing the new number (from 2 to 99) in the space provided. When the number of calls in the queue exceeds this number, calls go to overflow coverage. Check the appropriate box.

⑫ Group Type

Identify the MERLIN MAIL Calling Group as an Integrated VMI Group by checking the *Integrated VMI* box.

PBX System Form 6e, Continued

- ⑦ — Group No. 25
⑧ — Group ID MERMAIL

Calling Group Options

⑨ — **Hunt Type**

- Circular ◆
 Linear

Delay Announcement

- No ◆
 Extension No. _____

Message-Waiting Receiver

- No ◆
 Extension No. _____

Calls-in-Queue Alarm Threshold

- 1 call ◆
 ____ calls (2 - 99)

External Alert for Calls-in-Queue Alarm

- No
 Extension No. _____

⑩ — **Overflow Coverage**

- No ◆
 Calling Group No. _____
 QCC queue

⑪ — **Overflow Threshold**

- 1 call ◆
 ____ calls (2 - 99)

⑫ — **Group Type**

- Auto Logout ◆
 Auto Login
 Integrated VMI
 Generic VMI

Figure 2-8. MERLIN LEGEND Form 6e, Page 2

Immediate Call Handling with Fax

If you have more than one fax machine, you can use the first page of MERLIN LEGEND Form 6e to create a fax Calling Group.

- ① **Group No.**
Write the group number for the fax extensions. The MERLIN LEGEND System Manager can provide the next available Group Calling Number from MERLIN LEGEND Form 2d.
- ② **Group ID**
Write the Group ID for the Fax Calling Group.
- ③ **Factory-Set Ext. No.**
Write the factory-set extension number here. The MERLIN LEGEND System Manager can supply this number for the Calling Group. This number is also printed on MERLIN LEGEND Form 2d.
- ④ **Renumber To:**
If the extensions for the MERLIN LEGEND system have been renumbered, write the renumbered extension here. This number is also written on MERLIN LEGEND Form 2d.
- ⑤ **Stations**
Write all the fax extension numbers in the *Ext. No.* column. Write "Fax" in the corresponding spaces under *Person or Location*.

PBX System Form 6e

Group Calling

Maximum: 32 groups. Make a copy for each group.

① — Group No. (1–32) 26 Group ID FAX ②

② — Factory-Set. Ext. No. 771 Renumber To _____

⑤ — Stations ④

	Ext. No.	Person or Location		Ext. No.	Person or Location		Ext. No.	Person or Location		Ext. No.	Person or Location
1	<u>23</u>	<u>FAX</u>	6			11			16		
2	<u>24</u>	<u>FAX</u>	7			12			17		
3			8			13			18		
4			9			14			19		
5			10			15			20		

Trunks

Logical ID	Trunk No.	Logical ID	Trunk No.	Logical ID	Trunk No.	Logical ID	Trunk No.
1		21		41		61	
2		22		42		62	
3		23		43		63	
4		24		44		64	
5		25		45		65	
6		26		46		66	
7		27		47		67	
8		28		48		68	
9		29		49		69	
10		30		50		70	
11		31		51		71	
12		32		52		72	
13		33		53		73	
14		34		54		74	
15		35		55		75	

Figure 2-9. MERLIN LEGEND Form 6e, Page 1

MERLIN LEGEND Form 6f: System Features

Use MERLIN LEGEND Form 6f to specify information on the following system features:

- Transfer Return Interval—the number of rings before the transferred call returns to the transfer originator. This value should be greater than the Group Coverage Delay Interval (factory setting is three rings), which is the number of rings before a call is sent to a Group Coverage receiver.
 - Transfer Redirect Extension—the extension to which calls to unassigned extensions or numbers with no coverage can be transferred.
- ① **Return Time Interval**
Under *Transfer Options* on Form 6f, verify the Transfer Return Interval (shown as Return Time Interval). Check with the MERLIN LEGEND System Manager to make sure that it is greater than the Group Coverage Delay Interval. If a change is necessary, check the appropriate box and write the new Transfer Return Interval.
- ② **Calls to Unassigned Extensions**
Verify the current Transfer Redirect Extension. Calls can be transferred to a Queued Call Console (QCC), an individual extension, or a Calling Group extension. If a change is necessary, check the appropriate box and write the new extension.

PBX System Form 6f

System Features

① — Transfer Options

- Return Time Interval
- 4 rings ◆
 - 0 rings
 - _____ rings (1-3, 5-9)

- One-Touch Call Handling
- One-Touch Transfer ◆
 - Automatic Completion ◆
 - Manual Completion
 - One-Touch Hold

- Transfer Audible
- Music-On-Hold ◆
 - Ring

- Type of Transfer
- Ring button ◆
 - Voice button

- Camp-On Return Time
- 90 seconds ◆
 - _____seconds (30-89, 91-300)

- Call Park Return Time
- 180 seconds ◆
 - _____ seconds (30-179, 181-300)

- Automatic Callback Rings Interval
- 3 rings ◆
 - _____ rings (1-2, 4-6)

Extension Status

- Assign To operator positions

- Group Calling/CMS ◆
- Hotel

SMDR Options

- Call Repro Format
- Basic ◆
 - ISDN
- Call Length
- 40 seconds ◆
 - ___ seconds (0-39, 41-255)
- Calls Reported
- Incoming and outgoing ◆
 - Outgoing only

Inside Dial Tone

- Inside ◆
- Outside

Reminder Service Cancel

- No
- _____time of day

Calls To Unassigned Extensions — ②

- Qcc, Ext. No. _____
- Another extension,
 ext. No. 10
- Calling Group,
 ext. No. _____

Note: If you use equipment that rebroadcasts music or other copyrighted material, you maybe required to obtain a copyright license form and pay license fees to a third party such as the American Society of Composers, Artists, and Producers (ASCAP) or Broadcast Music incorporated (BMI). Or you can purchase a Magic on Hold® system, which does not require you to obtain a license, from AT&T or an authorized representative.

Figure 2-10. MERLIN LEGEND Form 6f

MERLIN LEGEND Form 7a: Night Service—Group Assignment

Use MERLIN LEGEND Form 7a to specify information on the use of Automated Attendant After-Hours Call Handling. Use Form 7a if you are using the Automated Attendant after normal business hours only.

- ① **Operator Ext. No.**
Write the night-service operator's extension (from MERLIN LEGEND Form 2a). This can be more than one extension.
- ② **Ext. No.**
Write the After-Hours Call Handling extension (from MERLIN LEGEND Form 2a). This can be more than one extension.
- ③ **Name**
Write "After-Hours Call Handling."

PBX System Form 7a

Night Service — Group Assignment

① — Operator Ext. No. 10 Operator Ext. No. _____ Operator Ext. No. _____ Operator Ext. No. _____

② — Ext. No. Name Ext. No. Name Ext. No. Name Ext. No. Name

③ — 31 After-Hours
Call Handling

Ext. No.	Name	Ext. No.	Name	Ext. No.	Name	Ext. No.	Name
31	After-Hours Call Handling						

Figure 2-11. MERLIN LEGEND Form 7a

MERLIN LEGEND Form 7b: Night Service—Outward Restriction

The MERLIN LEGEND system's Outward Restriction feature requires anyone using the telephones outside normal business hours (Night Service mode) to enter a password. You can specify extensions that are exempt from this restriction by using MERLIN LEGEND Form 7b.

Use Form 7b to make all MERLIN MAIL system ports exempt from the restriction. You must place all MERLIN MAIL system ports on the Exclusion List so that the MERLIN MAIL system works in Night Service. Place all MERLIN MAIL ports on the Exclusion List by identifying the extensions of each MERLIN MAIL port. You identified these extensions on MERLIN LEGEND Form 2a.

① **Ext. No.**

Write the extension numbers of the MERLIN MAIL ports.

② **Name**

Write the corresponding MERLIN MAIL port numbers.

PBX System Form 7b

Night Service — Outward Restriction

Password _____ (To keep your password private, do not fill in the blank.)

Emergency Allowed List			
Item No.	Telephone No. (12 digits maximum)	Item No.	Telephone No. (12 digits maximum)
0		5	
1		6	
2		7	
3		8	
4		9	

②

Exclusion List (Telephones not restricted during Night Service)					
Ext. No.	Name	Ext. No.	Name	Ext. No.	Name
18	MERLIN MAIL Port 1				
19	MERLIN MAIL Port 2				
20	MERLIN MAIL Port 3				
21	MERLIN MAIL Port 4				

Figure 2-12. MERLIN LEGEND Form 7b

MERLIN LEGEND Form 8b: Label Form—Stations and Calling Groups

Use MERLIN LEGEND Form 8b to identify the labels you will see on display phones. You need to identify the Calling Groups you have selected and the MERLIN MAIL extensions. This example shows labels selected for the MERLIN MAIL Calling Group and the four MERLIN MAIL ports. Fill in the appropriate information for each Calling Group and the MERLIN MAIL ports:

MERLIN MAIL Calling Group

- ① **Ext. No.**
Write the MERLIN MAIL (Integrated VMI) Calling Group number here. This number is from MERLIN LEGEND Form 6e. You may want to use the 3-digit factory-set extension number instead, as shown in the example (also from Form 6e).
- ② **Label**
Write MERMAIL here. Whenever the MERLIN MAIL system calls a subscriber who has a display phone, this is the name that appears on the display.

MERLIN MAIL Ports

- ① **Ext. No.**
Write the extension numbers of the MERLIN MAIL ports. These numbers are from MERLIN LEGEND Form 6e.
- ② **Label**
Write MERMAIL here for each corresponding extension.

PBX System Form 8b

①
②
Label Form — Stations and Calling Groups

Ext. No.	Label (7 characters maximum)	Ext. No.	Label (7 characters maximum)	Ext. No.	Label (7 characters maximum)
770	M E R M A I L				
18	M E R M A I L				
19	M E R M A I L				
20	M E R M A I L				
21	M E R M A I L				

Figure 2-13. MERLIN LEGEND Form 8b

MERLIN MAIL Planning

3

General Instructions

In this chapter you will complete the MERLIN MAIL planning forms. You need information from the MERLIN LEGEND forms to fill in these forms.

You can find blank MERLIN MAIL planning forms in Appendix A. Make copies of the forms for your use, leaving the blank forms in this manual. Store the completed forms in the pocket of the back cover of the *MERLIN MAIL System Administrator's Guide*.

The MERLIN MAIL forms you need are listed below:

- Form A: Voice Mail Assignments
- Form B: System Parameters
- Form C: System Greetings
- Form D: Automated Attendant Settings
- Form E: Automated Attendant Day Main Menu
- Form F: Automated Attendant After-Hours Main Menu
- Form G: Automated Attendant Submenus
- Form H: Automated Attendant Announcements
- Form I: Group Lists

MERLIN MAIL Form A: Voice Mail Assignments

Use MERLIN MAIL Form A to create mailboxes for extensions and identify the person and type of service assigned to each mailbox. Complete items 1 through 4 as instructed below. Fill in the applicable information for items 5 and 6 if you have Delayed Call Handling or After-Hours Call Handling Service.

- ① **Name**
Refer to MERLIN LEGEND Form 2a and copy the name of each MERLIN MAIL subscriber in this column.
- ② **Ext.**
Refer to MERLIN LEGEND Form 2a and copy the extension number of each subscriber in this column, next to the corresponding name.
- ③ **COS (Class of Service)**
Write in the Class of Service, choosing a COS number from the *Class* column of the following table. The Class of Service defines the characteristics of a mailbox.

Class of Service (COS) Key					
<i>Class</i>	<i>Mins</i>	<i>Transfer</i>	<i>Type</i>	<i>Outcalling</i>	<i>Service</i>
1	5	Unsupervised	No	CA	CA
2	0	Unsupervised	No	CA	CA
3	5	Unsupervised	No	CA	CA
4	5	Supervised	No	CA	CA
5	10	Supervised	No	CA	CA
6	15	Supervised	No	CA	CA
7	15	No Transfer	No	CA	CA
8	5	Unsupervised	Yes	CA	CA
9	10	Unsupervised	Yes	CA	CA
10	15	Unsupervised	Yes	CA	CA
11	5	Supervised	Yes	CA	CA
12	10	Supervised	Yes	CA	CA
13	15	Supervised	Yes	CA	CA
14	15	No Transfer	Yes	CA	CA
15*	0	No Transfer	No	AA	AA
16**	60	No Transfer	No	CA	CA

NOTE:

* Class 15 is assigned only for extensions with Automated Attendant Service, used for backup call handling and night service.

** Class 16 is a special mailbox used for purposes such as order taking, message drop, or Dictaphone. The General Mailbox should be designated Class 16.

Use the following guidelines to select the Class of Service:

- **Mins** (Minutes)—the size of the mailbox. Each mailbox can have 5, 10, 15, or 60 minutes of storage available. Use the 60-minute size only for special cases such as order taking, message drop, or dictaphone. The total storage time for all mailboxes is four hours.
- **Transfer Type**—how the MERLIN MAIL system handles a call. Unsupervised transfer is strongly recommended. Supervised transfer should be used only when the business indicates a special need.

Unsupervised Transfer

Unsupervised Transfer can be used both for extensions with or without Call Answer coverage. The MERLIN MAIL system will transfer the call without checking to see if the phone is busy or no one answers.

- If Call Answer coverage is provided, an unanswered call then goes to the MERLIN MAIL Calling Group or to a designated extension.
- If no Call Answer coverage is provided, the MERLIN MAIL system transfers the call to the System Operator if the phone is busy, or if the phone is not answered within four rings.

This is the most efficient transfer type, since calls are transferred immediately without waiting for them to be answered. It also reduces call processing time on the MERLIN MAIL port .

Supervised Transfer

The MERLIN MAIL system monitors a call until it is answered. If the subscriber's phone is busy or no one answers, it will prompt the caller to either enter another extension (and will transfer the call to that extension) or to leave a message. Processing calls takes longer with Supervised Transfer because the MERLIN MAIL system must wait until each call is answered. However, if the called party's extension does not have Call Answer coverage, it allows the caller to transfer or leave a message.

NOTE:

Supervised Transfer should *not* be used if an extension has Call Answer coverage.

No Transfer

Assign this Class of Service to people who do not have dedicated extensions, such as visitors, guests, or employees who do not have their own phones. Callers can leave messages in a designated mailbox where the subscriber can retrieve them. This type of mailbox has either 15 or 60 minutes of message storage. When a caller dials an extension assigned as No Transfer, the caller is prompted to leave a message.

- **Outcalling**—if outcalling is allowed, the MERLIN MAIL system will call the subscriber at a designated outside telephone number whenever there is a new message in the subscriber’s mailbox. Discretion should be used when allowing the outcalling feature, as there are no constraints placed on the destination of the outside the call. Business needs should dictate the use of this feature. The factory setting for the outcalling feature is “OFF and the individual subscriber must use the Voice Mail Service to turn it on.
- **Service**—indicates the type of service that will be used for covering calls on extensions with this class of service. (Automated Attendant=AA; Call Answer=CA.)

④ **Letter Key**

In the *Letter Key* column, translate up to ten letters of the first or last name of the person to whom the extension is assigned. Each letter of the name has a two-digit code. Except for the letters Q and Z, the first digit represents the number on the dial pad where the letter appears. The second digit represents whether the letter appears first, second, or third on the button. For example, “Smith” translates to 73 61 43 81 42—”S” is the third letter on the “7” button, “M” is the first letter on the “6” button, and so on.

The name you write here will be used in the directory list. The directory is automatically created as mailboxes are created for each subscriber. First and last names will appear in the directory in the same order that you specify on Form A. If the Automated Attendant Main Menu you create informs callers how to access the directory service, be sure to indicate which name (first or last) is used in the directory.

If callers do not know the extension of the person they want, they can access the directory of extensions by pressing [*] [A].

Letter Key					
A	=	21	N	=	62
B	=	22	O	=	63
C	=	23	P	=	71
D	=	31	Q	=	74
E	=	32	R	=	72
F	=	33	S	=	73
G	=	41	T	=	81
H	=	42	U	=	82
I	=	43	V	=	83
J	=	51	W	=	91
K	=	52	X	=	92
L	=	53	Y	=	93
M	=	61	Z	=	94

⑤ **Delayed Call Handling Service**

If you have Delayed Call Handling Service, fill in the following information:

- **Name**
Write "Delayed Call Handling."
- **Ext.**
Write the Delayed Call Handling extension number identified on MERLIN LEGEND Form 2a.
- **COS**
Write "15" for the Class of Service for this extension.

⑥ **After-Hours Call Handling Service**

If you have After-Hours Call Handling Service, fill in the following information:

- **Name**
Write "After-Hours Call Handling."
- **Ext.**
Write the After-Hours Call Handling extension number identified on MERLIN LEGEND Form 2a.
- **COS**
Write "15" for the Class of Service for this extension.

NOTE:

This information is not needed if the Automated Attendant service is used both day and night.

MERLIN MAIL Form A

Voice Mail Assignments

Mailbox Assignments:

- Identify the mailbox owner's name, extension and the COS selected (see "COSKey" on back of form).
- Translate the first ten letters of the owner's last name using the "Letter Key" shown on back of form. ④

①	Name	Ext.	COS	Letter Key															
②	Joanne R.	11	1	51	63	21	62	62	32										
③	Janet S.	12	8	51	21	62	32	81											
	Ram P.	13	1	72	21	61													
	Lou L.	14	8	53	63	82													
	Amy S.	15	1	21	61	93													
	Tony F.	16	1	81	63	62	93												
	Susan P.	17	1	73	82	73	21	62											
⑤	Delayed Call Handling	30	15																
⑥	After Hours Call Handling	31	15																

Figure 3-1. MERLIN MAIL Form A

MERLIN MAIL Form B: System Parameters

Complete MERLIN MAIL Form B to define the parameters of your MERLIN MAIL system.

Considerations

Review the operation of each available MERLIN MAIL service before deciding which of the services your company needs.

- **Automated Attendant Service**—takes the place of a human operator. External callers are greeted with a multilevel menu (customized to suit business needs) and prompted to select an extension or announcement, or to stay on the line for assistance. The call is then routed to the selected extension or the caller hears the requested information announcement.
- **Call Answer Service**—provides subscribers with an answering machine. When a called extension is busy or does not answer, callers are prompted to leave a message in the mailbox of the called party or to transfer to another extension. If they do not know the extension, they can enter a code to get a directory of listed extensions. If you have Call Answer coverage for selected extensions, you will always have Call Answer Service for those extensions regardless of the port allocation you select.
- **Voice Mail Service**—allows subscribers to send and receive messages and to customize their personal greeting.

Guidelines for Selecting Services

Read the following to determine which port allocation is needed for your company. Use this information to fill out Form B.

- *All ports Automated Attendant service*
 - You want external callers to get the Automated Attendant. If callers want to use Voice Mail, they can dial [*****][**7**] and will then be prompted to login to Voice Mail. Whether callers need direct access to Voice Mail depends on the nature of your business. If your callers will use Voice Mail occasionally, assign the Automated Attendant to all MERLIN MAIL ports.
- *All ports Call Answer Service*
 - You do not need Automated Attendant service and you want calls (on some lines) to get Voice Mail Service directly (they do not have to dial [*****][**7**] to access Voice Mail). In this case assign Call Answer service to all ports.

- *Split System* with Call Answer Service assigned to Ports 1 and 2, and Automated Attendant Service assigned to Ports 3 and 4.
 - You want to use the Automated Attendant service on some lines; on other lines you want callers to get Voice Mail directly. In this case, use a split system. Calls directed to lines on Ports 1 and 2 must dial [*] [7] to access Voice Mail; calls directed to lines on Ports 3 and 4 get Voice Mail directly.

Filling Out Form B

Once you have determined the correct port allocation for your MERLIN MAIL system, fill out Form B as follows:

Page 1:

① Services that Callers Need

- Automated Attendant Service—check this box if you want all phones to have Automated Attendant Service.
- Call Answer—check this box if you want to use only Call Answer Service.
- Both—check this box if your company needs Automated Attendant for some lines and Call Answer for others. Special installation steps are required when both services are used. Call the AT&T National Service Assistance Center (NSAC) or your AT&T authorized dealer for more information on using both services. The NSAC phone number is located on the inside front cover of this guide.

② Port Allocation

Use MERLIN LEGEND Form 2a to identify which jacks are to be connected to the four MERLIN MAIL ports. Write the lowest of the four jack numbers next to Port 1, the next lowest next to Port 2, and so on. The Port Allocation table on page 3-9 shows which ports will be programmed for each service when the MERLIN MAIL programming is complete.

③ Remote Maintenance Device Port

Use MERLIN LEGEND Form 2a to identify which jack is to be connected to the remote maintenance device (RMD). Write the jack number here.

④ Voice Mail Positions

Use MERLIN LEGEND Form 2a to identify the *Name* and *Ext.* for the System Administrator, the General Mailbox Owner, and the System Operator. Write the name and extension number in the spaces provided.

⑤ Maximum Digits in Extension

Use MERLIN LEGEND Form 2a to determine the maximum number of digits in the extensions: 2, 3, or 4. Write the number here.

MERLIN MAIL Form B

System Parameters

Services that Callers Need: —①

- Check one:
 Automated Attendant
 Call Answer
 Both

Port Allocation: —②

- Fill in the corresponding jack number from the Basic Telephone (012) Module in the space next to the appropriate MERLIN MAIL system port number.

Service Requested	Ports Assigned			
	Port 1 <u>18</u>	Port 2 <u>19</u>	Port 3 <u>20</u>	Port 4 <u>21</u>
All ports programmed for Automated Attendant (factory setting)	AA	AA	AA	AA
All ports programmed for Call Answer	CA	CA	CA	CA
Two ports programmed for Automated Attendant and two ports programmed for Call Answer	AA	AA	CA	CA

Remote Maintenance Device Port: —③

- Fill in the jack number used to connect the MERLIN MAIL system RMD. 22

Voice Mail Positions: —④

- The System Operator and General Mailbox Owner are usually the same person.

Position	Name	Ext.
System Administrator	<i>Ram P.</i>	<i>27</i>
General Mailbox Owner	<i>Janet S.</i>	<i>19</i> 10 ♦
System Operator	<i>Janet S.</i>	blank ♦

Maximum Digits In Extension: —⑤

- Write in the maximum number of digits in an extension _____ (2 ♦).

Figure 3-2. MERLIN MAIL Form B (Page 1)

Page 2:

⑥ **Weekly Business Schedule**

Determine if the MERLIN LEGEND business schedule is to be used. If so, use the MERLIN MAIL system factory setting of "CLOSED." If the MERLIN MAIL system is to have its own schedule, fill in the appropriate time for each day. If the MERLIN MAIL system is to operate 24 hours a day, write 00:00 both in the *Open* and in the *Closed* columns for each day.

MERLIN MAIL Form B

Weekly Business Schedule:

- For Automated Attendant Service after hours only, specify all days as CLOSED
- The factory setting is "CLOSED ALL DAY "
- For 24-hour operation, open = 12:00 midnight, closed = 12:00 midnight
- Use the MERLIN LEGEND schedule to drive the MERLIN MAIL schedule If you do not want to use the MERLIN LEGEND schedule, then administer an appropriate schedule for your company. Fill in the open and closed times for your business schedule.
- If you are not using Night Service on MERLIN LEGEND, then You should administer the schedule Fill in the open and closed times for your business schedule.

Option	Day	Open	Closed
1	Sunday	CLOSED	CLOSED
2	Monday		
3	Tuesday		
4	Wednesday		
5	Thursday		
6	Friday		
7	Saturday		

⑥

Figure 3-3. MERLIN MAIL Form B (Page 2)

MERLIN MAIL Form C: System Greetings

Use MERLIN MAIL Form C to create the greetings that callers hear when they reach the MERLIN MAIL system.

Automated Attendant Services

① **Day Greeting**

Write in the greeting that plays when callers reach the Automated Attendant Service during business hours. Ten seconds are allocated for the greeting. If the Touch-Tone Gate is set to "On," instruct the caller to press 1. For a discussion of Touch-Tone Gate considerations, see the instructions for Form D.

② **Night Greeting**

Write in the greeting that plays when callers reach the Automated Attendant Service after business hours. Ten seconds are allocated for the greeting. If the Touch-Tone Gate is set to "On," instruct the caller to press 1. For a discussion of Touch-Tone Gate considerations, see the instructions for Form D.

All Services

③ **Voice Mail Greeting**

Write in the greeting that plays to voice mail subscribers. Your greeting can be up to two minutes long and must include the instructions to enter the subscriber's extension and the pound sign. It is recommended that you use the factory-set Voice Mail Greeting, which welcomes the caller to the MERLIN MAIL system and prompts the caller to enter an extension followed by the pound sign.

MERLIN MAIL Form C

System Greetings

Automated Attendant Greeting:

- Greeting cannot exceed ten seconds.
- Record two separate greetings if using Automated Attendant for Day and Night Operation.
- If Touch Tone Gate is set to "On." inform callers with Touch Tone phones to press 1

① ————— Day Greeting

<i>Thank you for calling ANY Travel Agency. If you are</i>
<i>calling from a Touch-Tone phone, press 1 now</i>

② ————— Night Greeting

<i>We are sorry, ANY Travel Agency is closed. If you</i>
<i>would like to leave a message or hear an announcement</i>
<i>and are calling from a Touch-Tone phone, please</i>
<i>press 1 now.</i>

③ ————— Voice Mail Greeting

<i>Welcome to ANY Travel's message center. Please enter</i>
<i>your extension followed by the pound sign.</i>

Figure 3-4. MERLIN MAIL Form C (Page 1)

MERLIN MAIL Form D: Automated Attendant Settings

Complete MERLIN MAIL Form D only if your company wants to use Automated Attendant Service.

Immediate Call Handling

① **Call Handling**

Check the box marked *Immediate Call Handling*.

② **Fax Machine Extension**

Use MERLIN LEGEND Form 2a to identify the fax extension and write “fax” in this space. If there is more than one fax machine, create a Fax Calling Group on MERLIN LEGEND Form 6e. If you create a Fax Calling Group, do not assign lines to the group. Be sure that the MERLIN LEGEND System Manager has identified message-waiting receivers for the fax machines. Fax Call Handling can be used only when Immediate Call Handling is selected.

③ **Touch-Tone Gate**

Read the following guidelines before setting the Touch-Tone gate.

- If you have a fax machine, the Touch-Tone gate is automatically set to “On” and it cannot be turned off.
- If you do not have a fax machine, the following will help you, decide whether to set the the Touch-Tone gate “On” or “Off.” When the Touch-Tone Gate is on, callers from Touch-Tone phones are instructed to press [1] to hear the menu. If the system then does not detect a Touch-Tone, it recognizes that the caller is using a rotary phone and transfers the call directly to the System Operator or After-Hours Call handling extension.
 - If the Touch-Tone gate is on, rotary callers will get faster service because they will not have to listen to the menu before being transferred to a selected extension.
 - If the Touch-Tone gate is off, rotary callers will not be transferred until the menu is played. However, if most callers to your company have Touch-Tone phones, you should leave the Touch-Tone gate off, eliminating the step of pressing [1] to hear the menu.

Check the box marked “On” so that callers do not have to listen to the Main Menu before the call is transferred for assistance.

④ **Extensions in Dial Plan**

Check the first digit of each extension used in the dial plan. The dial plan is the record of all extension assignments at your company. Keep these in mind when deciding on Selector Codes on MERLIN MAIL Forms E, F, and G. For example, if your extensions number 10 to 39, then you should reserve Selector Codes 1, 2, and 3 for Transfer Type 5, transfer to a direct extension. This allows the system to recognize the caller’s selection as an extension.

Delayed Call Handling

- ① **Call Handling Type**
Check the box marked *Delayed Call Handling*.
- ② **Fax Machine Extension**
You cannot have a fax extension with Delayed Call Handling Service. Leave this space blank.
- ③ **Touch-Tone Gate**
See the guidelines for setting the Touch-Tone gate described above under Immediate Call Handling for those who do not have a fax machine. Check the box marked "On" so that callers do not have to listen to the Main Menu before the call is transferred for assistance.
- ④ **Extension in Dial Plan**
Check the first digit of each extension used in the dial plan. Keep these in mind when deciding on Selector Codes on MERLIN MAIL Forms E, F, and G.

After-Hours Call Handling

Use this only if the Automated Attendant will not be used during the day.

- ① **Call Handling Type**
Check the box marked *After-Hours Call Handling*.
- ② **Fax Machine Extension**
You cannot have a fax extension with After-Hours Call Handling Service. The fax tone will stop before the MERLIN MAIL system can answer the call. Leave this space blank.
- ③ **Touch-Tone Gate**
See the guidelines for setting the Touch-Tone gate described above under Immediate Call Handling for those who do not have a fax machine. Check the box marked "On" so that callers do not have to listen to the Main Menu before the call is transferred for assistance.
- ④ **Extension in Dial Plan**
Check the first digit of each extension used in the dial plan. Keep these in mind when deciding on Selector Codes on MERLIN MAIL Forms E, F, and G.

MERLIN MAIL Form D

Automated Attendant Settings

Call Handling Type: —①

Check one:

- Immediate Call Handling
- Delayed Call Handling
- After-Hours Call Handling

Fax Machine Extension: —②

- Fill in one extension number. If more than one fax machine is used, assign them to Group Calling
26

Touch-Tone Gate: —③

- Automatically set to "On" if *Fax Machine Extension* is filled in above.
 - On
 - Off

Extensions in Dial Plan: ④

- Check the first digit of each extension used in the dial plan.

1	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	4	<input type="checkbox"/>	5	<input type="checkbox"/>	6	<input type="checkbox"/>	7	<input type="checkbox"/>	8	<input type="checkbox"/>	9	<input type="checkbox"/>
---	-------------------------------------	---	-------------------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------	---	--------------------------

Figure 3-5. MERLIN MAIL Form D

MERLIN MAIL Form E: Automated Attendant Day Main Menu

Use MERLIN MAIL Form E to create the Day Main Menu and the script a caller hears if Automated Attendant coverage is selected for hours when the business is open.

NOTE:

If you plan to use submenus or a prerecorded announcement as options on your Main Menu, you must create them *before* you can complete the Day Main Menu programming. See MERLIN MAIL Form G for setting up submenus and MERLIN MAIL Form H for setting up announcements.

Write the following information on the *Automated Attendant Day Main Menu* form:

Page 1:

① Selector Code

The Selector Codes allow callers to enter a single digit from the Main Menu so that their calls are transferred to the department, individual, announcement, or submenu they select. Be sure to assign the most requested department or extension as the first route and list the Selector Codes in ascending order so that it's easier for callers to remember them. For the same reason, try to limit the menu to five or fewer selections.

Since some older model fax machines do not send the signal that the MERLIN MAIL system uses to detect fax calls, you must assign a Selector Code for fax calls (using Transfer Type 1—transfer to a specified extension) to the fax extension or Group Calling number. Be sure to include instructions in the Day Main Menu Script to tell callers to dial the Selector Code to send a fax.

Selector Codes 1, 2, 3, and 4 are factory-set to Transfer Type 5—transfer directly to an extension. If any of these Selector Codes are not being used, cross them off the Main Menu.

② Transfer Type

The Transfer Type determines where the call will be transferred when a caller enters a Selector Code. Write in one of the transfer types shown below:

- *Type 1*—Transfer to a Selector Code
When a caller presses the Selector Code, the call is transferred to a specific extension or Calling Group assigned to a Selector Code.
- *Type 2*—Transfer to an Existing Submenu
When a caller presses the Selector Code, another menu plays from which the caller enters another Selector Code. Be sure to complete Form G: Automated Attendant Submenus. *The submenu must already exist before you can program this transfer type.*

- **Type 3—Transfer to an Existing Announcement**
If the information needed by callers—for example, your business hours or a mailing address—can be provided in an announcement, use this type of transfer. When a caller presses the Selector Code, the caller hears a prerecorded announcement. Be sure to complete MERLIN MAIL Form H: Automated Attendant Announcements. *The announcement must already exist before you can program this transfer type.*
- **Type 4—Prompt for an Extension**
Callers must enter a Selector Code before they can dial an individual extension. Use this type of transfer if your company's extensions coincide with the Selector Codes the company wants to use. For example, if all company extensions begin with 1 or 2, use Selector Codes 1 and 2 and Transfer Type 4 to enable a transfer from the Day Main Menu following a prompt.
- **Type 5—Transfer Directly to an Extension**
Callers can dial an individual extension from the Day Main Menu if the Selector Code(s) matching the first digit(s) of the extensions in a company are reserved for this type of transfer. For example, if all company extensions begin with 1 or 2, use Selector Codes 1 and 2 to enable a direct transfer from the Day Main Menu. This allows the system to recognize the caller's selection as an extension.

③

Number

For Transfer Type 1, 2, or 3, write in the corresponding extension number, announcement number, or submenu number to which the Selector Code will transfer a call. Transfer Types 4 and 5 do not require an entry in the *Number* column.

④

Destination

Write in the name of the submenu, announcement, business function, or extension destination where the call will be transferred when the caller enters a Selector Code.

MERLIN MAIL Form E

Automated Attendant Day Main Menu

Day Main Menu:

- If you are using Automated Attendant for Day and for Night Operation, complete both the Day Main Menu and the Night Main Menu tables, even if the menus are identical.

Day Main Menu			
Selector Code	Transfer Type*	Number	Destination
1	2 (5)	31	Cruise submenu
2	1 (5)	11	Corporate Travel Agent - Joanne
3	1 (5)	17	Personal Travel Agent - Susan
4	3 (5)	32	Discount Trip Announcement
5	4		Requested extension
6	1	26	Fax extension
7			
8			
9			

***Transfer Type Key**

- 1 to a Selector Code
- 2 to an existing submenu
- 3 to an existing announcement
- 4 prompt for an extension
- 5 transfer directly to an extension

Figure 3-6. MERLIN MAIL Form E (Page 1)

Page 2:

⑤ Day Main Menu Script

Write a Day Main Menu Script that identifies the department, person, or type of information the caller receives after choosing a Selector Code from the Day Main Menu.

If applicable, the script should explain to callers how they can reach an individual extension, how to send a fax, how to use the directory, and how to get assistance. If you offer a caller the directory list, tell them whether it is listed by first or last name. Make sure that the Dial 0/Timeout Action Option matches the menu.

⑥ **Day Dial 0/Timeout Action Options**

These three options offer you a choice of how to handle calls when callers press 0 or do not enter a Selector Code or extension within four seconds. The Day Dial 0/Timeout Action Option can be different from the Night Dial 0/Timeout Action Option. The example shows that calls are being transferred to the System Operator. Select one of the following options by checking the appropriate box.:

- Transfer to the System Operator for assistance (factory setting).
- Transfer to the General Mailbox to leave a message.
- Disconnect the call.

MERLIN MAIL Form E

Day Main Menu Script:

- Write a script for the Day Main Menu that callers will hear after the Automated Attendant Day Greeting.

⑤

Day Main Menu Script	
<i>If you know the extension of the person you are calling, press 5, then the extension. If you would like</i>	
FOR <i>cruise information</i>	press <i>1</i>
FOR <i>to speak to the Corporate Travel Agent</i>	press <i>2</i>
FOR <i>to speak to a Personal Travel Agent</i>	press <i>3</i>
FOR <i>discount trip information</i>	press <i>4</i>
FOR <i>to send a fax</i>	press <i>6</i>

Day Dial 0/ Timeout Options: — ⑥

- Specify where calls should be transferred if the caller does not enter a Selector Code within four seconds.
 - Check one:
 - System Operator
 - General Mailbox
 - Disconnect

Figure 3-7. MERLIN MAIL Form E (Page 2)

MERLIN MAIL Form F: Automated Attendant After-Hours Main Menu

Complete MERLIN MAIL Form F to create the after-hours menu and script a caller hears if Automated Attendant coverage is chosen for hours when the business is closed.

Use this form even if the After-Hours Main Menu and the Day Main Menu are identical.

NOTE:

If you plan to use submenus or a prerecorded announcement as options on your Main Menu, you must create them *before* you can complete the After-Hours Main Menu programming. See MERLIN MAIL Form G for setting up submenus and MERLIN MAIL Form H for setting up announcements.

Fill in the following information on the *Automated Attendant After-Hours Main Menu* form:

Page 1:

① **Selector Codes**

The Selector Codes allow callers to enter a single digit from the Main Menu so that their calls are transferred to the department, individual, announcement, or submenu they select. Be sure to assign the most frequently requested department or extension as the first route and list the Selector Codes in ascending order so that it is easier for callers to remember them. For the same reason, try to limit the menu to five or fewer selections.

Since some older model fax machines do not send the signal that the MERLIN MAIL system uses to detect fax calls, you must assign a Selector Code for fax calls (using Transfer Type 1—transfer to a specified extension) to the fax extension or Group Calling number. Be sure to include instructions in the After-Hours Main Menu Script to tell callers to dial the Selector Code to send a fax.

Selector Codes 1, 2, 3, and 4 are factory-set to Transfer Type 5—transfer directly to an extension. If any of these Selector Codes are not being used, cross them off the Main Menu.

② **Transfer Type**

The Transfer Type determines where the call will be transferred when a caller enters a Selector Code. Write in one of the transfer types shown below:

- *Type 1* —Transfer to a Selector Code

When a caller enters the Selector Code, the call is transferred to a specific extension or Calling Group assigned to a Selector Code.

- **Type 2** —Transfer to an Existing Submenu
When a caller chooses the Selector Code, another menu plays from which the caller enters another Selector Code. Be sure to complete Form G: Automated Attendant Submenus. *The submenu must already exist before you can program this transfer type.*
- **Type 3** —Transfer to an Existing Announcement
If the information needed by callers—for example, your business hours or a mailing address—can be provided in an announcement, use this type of transfer. When a caller presses the Selector Code, the caller hears a prerecorded announcement. Be sure to complete Form H: Automated Attendant Announcements. *The announcement must already exist before you can program this transfer type.*
- **Type 4** —Prompt for an Extension
Callers must enter a Selector Code before they can dial an individual extension. Use this type of transfer if your company's extensions coincide with the Selector Codes the company wants to use. For example, if all company extensions begin with 1 or 2, use Selector Codes 1 and 2 and Transfer Type 4 to enable a transfer from the Day Main Menu following a prompt.
- **Type 5** —Transfer Directly to an Extension
Callers can dial an individual extension from the After-Hours Main Menu if the Selector Code(s) matching the first digit(s) of the extensions in a company are reserved for this type of transfer. For example, if all company extensions begin with 1 or 2, use Selector Codes 1 and 2 to enable a direct transfer from the Day Main Menu. This allows the system to recognize the caller's selection as an extension.

③

Number

For Transfer Type 1, 2, or 3, write in the corresponding extension number, announcement number, or submenu number to which the Selector Code will transfer a call. Transfer Types 4 and 5 do not require an entry in the *Number* column.

④

Destination

Write in the name of the submenu, announcement, business function, or extension destination where the call will be transferred when the caller enters a Selector Code.

MERLIN MAIL Form F

Automated Attendant After-Hours Main Menu

After-Hours Main Menu:

- If using Automated Attendant for Day and After-Hours Operation, complete the After-Hours Main Menu form, even if the Day Main Menu is identical.

After-Hours Main Menu			
① Selector Code	Transfer Type*	Number	Destination
1	2 <input checked="" type="checkbox"/>	31	Cruise submenu
② 2	1 <input checked="" type="checkbox"/>	11	Corporate Travel Agent — Joanne
③ 3	1 <input checked="" type="checkbox"/>	17	Personal Travel Agent — Susan
4	3 <input checked="" type="checkbox"/>	32	Discount Trip Announcement
5	4		Requested extension (after prompt)
6	5		Individual's extension (direct
④ 7			transfer)
8			
9			

***Transfer Type Key**

- 1 to a Selector Code
- 2 to an existing submenu
- 3 to an existing announcement
- 4 prompt for an extension
- 5 transfer directly to an extension

Figure 3-8. MERLIN MAIL Form F (Page 1)

Page 2:

- ⑤ **After-Hours Main Menu Script**
Write an After-Hours Main Menu script that identifies the department, person, or type of information the caller receives after entering a Selector Code from the After-Hours Main Menu.

If applicable, the script should explain to callers how they can reach an individual extension, how to send a fax, how to use the directory, and how to get assistance. If you offer a caller the directory list, tell them whether it is listed by first or last name. Make sure that the Dial 0/Timeout Action Option matches the menu.

⑥ **After-Hours Dial 0/Timeout Options**

These three options offer you a choice of handling calls when callers press 0 or do not enter a Selector Code or extension within four seconds. The After-Hours Dial 0/Timeout Action Option can be different from the Day Dial 0/Timeout Action Option. Enter one of the following options by checking the appropriate box:

- Transfer to the System Operator for assistance (factory setting).
- Transfer to the General Mailbox to leave a message.
- Disconnect the call.

MERLIN MAIL Form F

After-Hours Main Menu Script:

- Write a script for the After-Hours Main Menu that callers will hear after the Automated Attendant After-Hours Greeting.

⑤

After-Hours Main Menu Script	
<i>If you wish to leave a message, press 5, then the extension.</i>	
For <u> <i>cruise information</i> </u>	press <u> <i>1</i> </u>
For <u> <i>the Corporate Travel Agent</i> </u>	press <u> <i>2</i> </u>
For <u> <i>the Personal Travel Agent</i> </u>	press <u> <i>3</i> </u>
For <u> <i>discounted trip information</i> </u>	press <u> <i>4</i> </u>
For _____	press _____

After-Hours Dial 0/Timeout Options: ⑥

- Specify where calls should be transferred if the caller does not enter a Selector Code within four seconds.

- Check one:
- System Operator
 - General Mailbox
 - Disconnect

Figure 3-9. MERLIN MAIL Form F (Page 2)

MERLIN MAIL Form G: Automated Attendant Submenus

Use MERLIN MAIL Form G when you specify Transfer Type 2 (transfer to a submenu) for any of the Selector Codes. You can create up to 99 submenus, but keep in mind that more than two levels of menus can confuse callers. You must create and record each submenu (last level first) *before* you record the Main Menu. Use a separate copy of MERLIN MAIL Form G to plan each submenu.

Write the following information on the *Automated Attendant Submenus* form:

Page 1:

- ① **Submenu No.**

Assign each submenu an identifying number (01 through 99), then write the submenu script in the space provided. If you want to record more than three submenus, make additional copies of this blank planning form. Note that *a submenu must be created and recorded before you can program a Selector Code for it*. A Selector Code is the digit that callers will enter to select a menu option, such as a submenu. Selector Codes are assigned using MERLIN MAIL Forms E, F, and G.
- ② **Selector Code**

The Selector Codes allow callers to enter a single digit from the Submenu to have their calls automatically transferred to the department, individual, announcement, or submenu they select. Be sure to assign the most frequently requested department or extension to Selector Code 1 and list the Selector Codes in ascending order, so that it is easier for callers to remember them. For the same reason, try to limit the menu to five or fewer selections.
- ③ **Transfer Type**

The Transfer Type where the call will be transferred when a caller enters a Selector Code. Write in one of the transfer types shown below:

 - **Type 1**—Transfer to a Selector Code
When a caller enters the Selector Code, the call is transferred to a specific extension or Calling Group assigned to a Selector Code.
 - **Type 2**—Transfer to an Existing Submenu
When a caller enters the Selector Code, another menu plays from which the caller chooses another Selector Code. Be sure to complete another copy of Form G: Automated Attendant Submenus for this additional submenu. *The submenu must already exist before you can program this transfer type.*
 - **Type 3**—Transfer to an Existing Announcement
If the information needed by callers can be provided in an announcement, use this type of transfer. When a caller chooses the Selector Code, the caller hears a prerecorded announcement. Be sure to complete MERLIN MAIL Form H: Automated Attendant Announcements. *The announcement must already exist before you can program this transfer type.*

- *Type 4*—Prompt for an Extension
Callers must enter a Selector Code before they can dial an individual extension. Use this type of transfer if your company's extensions coincide with the Selector Codes the company wants to use. For example, if all company extensions begin with 1 or 2, use Selector Codes 1 and 2 and transfer Type 4 to enable a transfer from the Day Main Menu following a prompt.
- *Type 5*—Transfer Directly to an Extension
Callers can dial an individual extension from the Day Main Menu, if the Selector Code(s) matching the first digit(s) of the extensions in a company are reserved for this type of transfer. For example, if all company extensions begin with 1 or 2, use Selector Codes 1 and 2 to enable a direct transfer from the Day Main Menu. This allows the system to recognize the caller's selection as an extension.

④ **Number**

For Transfer Type 1, 2, or 3, write in the corresponding extension number, announcement number, or submenu number to which the Selector Code will transfer a call. Transfer Types 4 and 5 do not require an entry in the *Number* column.

⑤ **Destination**

Write in the name of the submenu, announcement, or extension destination where the call will be transferred when the caller enters a Selector Code.

MERLIN MAIL Form G

Automated Attendant Submenus

Submenu Selector Codes:

- During administration of Automated Attendant, you must create and record each submenu (last one f first) before the Main Menu
- Make copies for multiple submenus.

Submenu No. <u>31</u>			
Selector Code	Transfer Type*	Number	Destination
1	2	33	<i>Cruise submenu</i>
2	3	34	<i>Hawaiian Cruise Announcement</i>
3	3	35	<i>Alaskan Cruise Announcement</i>
4	1	15	<i>Cruise Travel Agent - Amy</i>
5	4		<i>Requested extension (after prompt)</i>
6	5		<i>Requested extension (direct transfer)</i>
7			
8			
9			

***Transfer Type Key**

- 1 to a Selector Code
- 2 to an existing submenu
- 3 to an existing announcement
- 4 prompt for a specified extension
- 5 transfer to a specified extension

Figure 3-10. MERLIN MAIL Form G (Page 1)

Page 2:

⑥ **Submenu Script**

Write a Submenu Script that identifies the department, person, or type of information the caller receives after choosing a Selector Code from the Submenu.

MERLIN MAIL Form G

Submenu No. 31 Script: ^⑥

- Write a script that callers will hear when they select the submenu above.

Submenu No. <u>31</u> Script		
ANY Travel Agency is pleased to offer three exciting cruise packages.		
For	<u>Caribbean Cruises</u>	press <u>1</u>
For	<u>Hawaiian Cruises</u>	press <u>2</u>
For	<u>Alaskan Cruises</u>	press <u>3</u>
For	<u>Cruise Travel Agent</u>	press <u>4</u>
For	_____	press _____

Figure 3-11. MERLIN MAIL Form G (Page 2)

MERLIN MAIL Form H: Automated Attendant Announcements

Complete MERLIN MAIL Form H to create announcements that provide current or frequently requested information to callers. You can create up to 99 sub-menus (providing the opportunity for a caller to access many different announcements), but keep in mind that more than two levels of submenus can confuse callers. The announcements can be updated regularly to provide callers with the latest information, such as weather reports, stock quotes, product information, directions, and entertainment listings. Each announcement can be up to two minutes in length.

Fill in the following information on the *Automated Attendant Announcements* form:

- ① **Announcement No.**
Assign each announcement an identifying number (1 through 99), then write the announcement in the space provided. If you want to record more than three announcements, make additional copies of this blank planning form. Note that *an announcement must be created and recorded before you can program a Selector Code for it*. A Selector Code is the digit that callers will enter to select a menu option, such as an announcement. Selector Codes are assigned using MERLIN MAIL Forms E, F, and G.

NOTE:

If a caller makes no response within four seconds MERLIN MAIL will hang up. Therefore, be sure to tell the caller near the end of the announcement to press [*****] [**7**] to go back to a previous menu, or to press [**0**] to transfer to the System Operator. Repeat the instructions to give them more time to decide.

MERLIN MAIL Form H

Automated Attendant Announcements

Announcements:

- Each announcement can be up to two minutes in length. When programming Automated Attendant, you must create and record all announcements before creating the Main Menu or submenu that refers to it.
- Make more copies of this blank form if you want to create more than three announcements.

① ————— Announcement No. 32

During the month of August, ANY Travel Agency is
proud to offer a complete Florida Fantasy Family Vacation.
Price quotes include roundtrip airfare, . . .

Announcement No. <u>34</u>
ANY Travel Agency offers a special Hawaiian Honeymoon
Heaven cruise. The all-inclusive package, . . .

Announcement No. <u>35</u>
View the spectacular shore line from a luxury cruise
ship. ANY Travel Agency's Summer Nights in Alaska
cruise offers, . . .

Figure 3-12. MERLIN MAIL Form H

MERLIN MAIL Form I: Group Lists

Voice Mail Service

Use MERLIN MAIL Form I to create Group Lists. Group Lists provide the ability to send voice mail to multiple subscribers without having to dial each extension. When sending a message, a subscriber can enter a Group List Number, rather than an extension, to send the message to all mailboxes on the Group List. Create the Group List to suit the business needs. Be sure to make copies for the subscribers so that they know to which Group List(s) they belong.

Fill in the following information on the *Group Lists* form:

- ① **Group List No.**
Write in the number of the Group List. This is the number subscribers dial instead of an extension number. If you want more than one Group List, number the lists sequentially.
- ② **Extension**
Write the extensions to be included on the Group List in this column. Your business needs will determine which subscribers to include in a Group List.
- ③ **Name**
Write in the name of the subscriber assigned to each extension.

Appendix A: MERLIN MAIL Forms

MERLIN MAIL Form A

Class of Service (COS) Key			
Class	Mins	Transfer Type	Outcalling
1	5	Unsupervised	No
2	10	Unsupervised	No
3	15	Unsupervised	No
4	5	Supervised	No
5	10	Supervised	No
6	15	Supervised	No
7	15	No Transfer	No
8	5	Unsupervised	Yes
9	10	Unsupervised	Yes
10	15	Unsupervised	Yes
11	5	Supervised	Yes
12	10	Supervised	Yes
13	15	Supervised	Yes
14	15	No Transfer	Yes
15	0	No Transfer	No
16	60	No Transfer	No

Letter Key			
A	=	21	N = 62
B	=	22	O = 63
C	=	23	P = 71
D	=	31	Q = 74
E	=	32	R = 72
F	=	33	S = 73
G	=	41	T = 81
H	=	42	U = 82
I	=	43	V = 83
J	=	51	W = 91
K	=	52	X = 92
L	=	53	Y = 93
M	=	61	Z = 94

MERLIN MAIL Form B

System Parameters

Services that Callers Need:

Check one:

- Automated Attendant
- Call Answer
- Both

Port Allocation:

- Fill in the corresponding jack number from the Basic Telephone (012) Module in the space next to the appropriate MERLIN MAIL system port number.

Service Requested	Ports Assigned			
	Port 1____	Port 2____	Port 3____	Port 4____
All ports programmed for Automated Attendant (factory setting)	AA	AA	AA	AA
All ports programmed for Call Answer	CA	CA	CA	CA
Two ports programmed for Automated Attendant and two ports programmed for Call Answer	AA	AA	CA	CA

Remote Maintenance Device Port:

- Fill in the jack number used to connect the MERLIN MAIL system RMD. _____

Voice Mail Positions:

- The System Operator and General Mailbox Owner are usually the same person.

Position	Name	Ext.
System Administrator		
General Mailbox Owner		10 ♦
System Operator		blank ♦

Maximum Digits in Extension:

- Write in the maximum number of digits in an extension _____ (2 ♦).

MERLIN MAIL Form B

Weekly Business Schedule

- For Automated Attendant Service after hours only, specify all days as closed.
- The factory setting is "CLOSED ALL DAY."
- For 24-hour operation, open = 12:00 midnight, closed = 12:00 midnight
- Use the MERLIN LEGEND schedule to drive the MERLIN MAIL schedule. If you do not want to use the MERLIN LEGEND schedule, then administer an appropriate schedule for your company. Fill in the open and closed times for your business schedule.
- If you are not using Night Service on the MERLIN LEGEND system, then you should administer the schedule. Fill in the open and closed times for your business schedule.

Option	Day	Open	Closed
1	Sunday		
2	Monday		
3	Tuesday		
4	Wednesday		
5	Thursday		
6	Friday		
7	Saturday		

Automated Attendant Settings

Call Handling Type:

Check one:

- Immediate Call Handling
- Delayed Call Handling
- After-Hours Call Handling

Fax Machine Extension:

- Fill in one extension number. If more than one fax machine is used, assign them to Group Calling.

Touch-Tone Gate:

- Automatically set to "On" if *Fax Machine Extension* is filled in above.
 - On
 - Off

Extensions in Dial Plan:

- Check the first digit of each extension used in the dial plan.

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

MERLIN MAIL Form E

Day Main Menu Script:

- Write a script for the Day Main Menu that callers will hear after the Automated Attendant Day Greeting.

Day Main Menu Script		
For _____	press _____	
For _____	press _____	
For _____	press _____	
For _____	press _____	
For _____	press _____	

Day Dial 0/ Timeout Options:

- Specify where calls should be transferred if the caller does not enter a Selector Code within four seconds.

Check one:

- System Operator
- General Mailbox
- Disconnect

MERLIN MAIL Form F

After-Hours Main Menu Script:

- Write a script for the After-Hours Main Menu that callers will hear after the Automated Attendant After-Hours Greeting.

After-Hours Main Menu Script	
For _____	press _____
For _____	press _____
For _____	press _____
For _____	press _____
For _____	press _____

After-Hours Dial 0/ Timeout Options:

- Specify where calls should be transferred if the caller does not enter a Selector Code within four seconds.
Check one:
 - System Operator
 - General Mailbox
 - Disconnect

MERLIN MAIL Form F

Automated Attendant After-Hours Main Menu

After-Hours Main Menu:

- If using Automated Attendant for Day and After-Hours Operation, complete the After-Hours Main Menu form, even if the Day Main Menu is identical.

After-Hours Main Menu			
Selector Code	Transfer Type*	Number	Destination
1	(5 ♦)		
2	(5 ♦)		
3	(5 ♦)		
4	(5 ♦)		
5			
6			
7			
8			
9			

*Transfer Type Key

- 1 to a Selector Code
- 2 to an existing submenu
- 3 to an existing announcement
- 4 prompt for an extension
- 5 transfer directly to an extension

Automated Attendant Submenus

Submenu Selector Codes:

- During administration of Automated Attendant, You must create and record each submenu (last one first) before the Main Menu.
- Make copies for multiple submenus.

Submenu No. _____			
Selector Code	Transfer Type*	Number	Destination
1			
2			
3			
4			
5			
6			
7			
8			
9			

*Transfer Type Key

- 1 to a Selector Code
- 2 to an existing submenu
- 3 to an existing announcement
- 4 prompt for a specified extension
- 5 transfer to a specified extension

MERLIN MAIL Form G

Submenu No. _____ Script:

- Write a script that callers will hear when they select the submenu above.

Submenu No. _____ Script	
For _____	press _____
For _____	press _____
For _____	press _____
For _____	press _____
For _____	press _____

Automated Attendant Announcements

Announcements:

- Each announcement can be up to two minutes in length. When programming Automated Attendant, you must create and record all announcements before creating the Main Menu or submenu that refers to it.
- Make more copies of this blank form if you want to create more than three announcements,

Announcement No. _____

Announcement No. _____

Announcement No. _____

Appendix B: Factory Settings

MERLIN MAIL System Factory Settings	
MERLIN MAIL Parameter	Factory Setting
Automated Attendant	
Automated Attendant Menu IDs	1-99
Automated Attendant Announcement IDs	1-99
Business Schedule	Closed All Day
Immediate Answer/Delayed Answer	Immediate Answer
No. of rings for Immediate Answer	1
No. of rings for Delayed Answer	4
No. of rings for Ring-No-Answer	4
System Operator's Extension	Blank
No. digits in extension number	2
Timeout Action Option No Fax	4 sec./Transfer to System Operator
Timeout Action Option With Fax	8 sec./Transfer to System Operator

(Continued)

MERLIN MAIL System Factory Settings	
MERLIN MAIL Parameter	Factory Setting
Greetings/Prompts	
Initial Greetings	10 sec.
Menu Prompts	2 min.
Personal Greetings	2 min.
Name Recordings	4 sec.
Messages	
Message length	1 sec. -2 min.
Mailboxes	
System Operator's Mailbox	Blank
System Administrator's Mailbox	9997 Password 1234
Trouble Mailbox	9998
General Mailbox Owner	9999 Extension 10
Miscellaneous	
Group List IDs	1-99
Host Switch	MERLIN II R3
Maximum Digits in Extension	2
Outcalling	Off

Glossary

Announcement

An informative message (usually provides frequently requested information) that is prerecorded by the System Administrator and plays to callers who select it from the Main Menu or a submenu. After an announcement plays, callers can transfer to the System Operator.

Automated Attendant Service

The system component that automatically answers and directs incoming calls to the desired extensions.

Business Schedule

The days and hours that a business is open or closed. The programmable option that determines when the Automated Attendant Day or Night Service is offered.

Broadcast

A feature that allows the System Administrator to send a message to all mail system subscribers at the same time without dialing each extension.

Call Answer Service

Allows callers to leave a message or to transfer to another extension when their calls are not answered (either busy or no answer).

Calling Group

An extension or group of extensions to which calls are redirected by phones from group coverage. See also *Group Calling*.

Class of Service (COS)

Defines the characteristics of a mailbox. Identifies the total message size (5, 10, 15, or 60 minutes), the type of transfer (Unsupervised, Supervised, or No Transfer), and the Outcalling permission.

Coverage

Designates an alternate answering position when the person called is not available to answer the phone. This feature is programmed by the MERLIN LEGEND System Manager.

Day Greeting

The Automated Attendant Greeting that plays during the hours that a company is open for business.

Delayed Answer

The feature that allows MERLIN MAIL ports to answer a call after a delay of four rings. A port administered for Call Answer service should be set for Delayed Answer. See also *Immediate Answer*.

Dial Plan

The extension assignments for all equipment (voice or data) connected to the communications system.

Dial 0/Timeout Option

Determines how a call is processed when a caller dials Selector Code 0 or when a caller does not make a selection from a menu within four seconds after the menu finishes playing. Calls can be transferred to the System Operator, to the General Mailbox, or can be disconnected. This option is programmed separately for day and night by the System Administrator.

Exclusion List

When the Outward Restriction feature is used, subscribers who are on the Exclusion List are able to call out after business hours without using a password.

Extension

Two to four digits that identify a phone or other voice or data equipment connected to the system.

Factory Settings

The settings that are in effect when the MERLIN LEGEND Communications System or the MERLIN MAIL Voice Messaging System is shipped. Sometimes these settings are known as "default settings."

General Mailbox

A storage area (Mailbox 9999) where callers who are dialing from rotary phones or callers who do not know the extension of the person they would like to contact can leave messages.

General Mailbox Owner

The individual responsible for transferring messages in the General Mailbox to the appropriate person. The message-waiting indicator on the General Mailbox Owner's phone lights whenever a message is placed in the General Mailbox.

Greetings

Different messages that play to callers depending on the service selected and the time of day.

Group Calling

A feature that identifies an extension or group of extensions to which calls are redirected by phones from group coverage. See also Calling Group.

Group Coverage

Extensions that are grouped for coverage by the Call Answer Service, a receptionist, a Calling Group, or another extension.

Group Coverage Delay Interval

The Group Coverage Delay Interval is the number of rings that will occur at a coverage extension before a call will be sent to an assigned Calling Group (group coverage receiver).

Group List

A list of subscribers programmed into the system and assigned a number so that people on the system can record a single message and send it to everyone on the list at the same time simply by using the Group List number. The System Administrator maintains the list.

Host Switch

The communications system and processor that routes incoming and outgoing calls between the MERLIN MAIL system and the central office lines.

Hunt Pattern

The hunt pattern defines the search pattern used by the Group Calling feature to search for the next available extension for answering a redirected call. VMI Group Calling uses a *linear* hunt pattern to search in the order in which phones are assigned to the group.

Immediate Answer

The feature that allows MERLIN MAIL ports to answer a call after one ring. MERLIN MAIL ports not set for Delayed Answer are automatically set for Immediate Answer. Immediate Answer is the factory setting. See also *Delayed Answer*.

Key System

A telephone system for telephones that have multiple buttons, permitting the user to select outgoing or incoming central office phone lines directly. With a key system, you do not have to dial "9" to get an outside line.

Mailbox

All registered MERLIN MAIL subscribers are assigned storage space where messages can be left. Mailbox numbers are usually the same as extension numbers, except for the General Mailbox and the Trouble Mailbox.

Main Menu

A list of options presented to the caller. It is the first choice point in what may be a hierarchy of menus and submenus. The caller enters a Selector Code from the menu and the call is routed on lines answered by the Automated Attendant Service to a specific extension, submenu, or an announcement.

Main Menu Script

The list of options that plays after the Automated Attendant Day or Night Greeting. It describes to callers what is available on the Main Menu and provides a list of Selector Codes that callers can select to get to the extension, submenu, or announcement they want.

Message-Waiting Receiver

The telephone in a Calling Group designated to receive message-waiting indications for calls that have been redirected from group coverage.

Night Greeting

The Automated Attendant greeting that plays during the hours that a company is closed for business.

Night Service

Night Service operation can be programmed to handle after-hours calls automatically, based on a predetermined schedule (Night Service with Time Set). It can also be turned on manually when the System Operator presses the Night button. Night Service with Outward Restriction requires subscribers to enter a password in order to dial outside calls. The system plays the Night Greeting and the Night Main Menu for callers during Night Service mode.

No Transfer

A transfer type that is normally used for visitors, guests, or employees who need to receive messages in the office but do not have a phone assigned to them. Callers can dial the visitor's extension number and leave a message that the visitor can retrieve by calling into Voice Mail. See also *Supervised Transfer* and *Unsupervised Transfer*.

Outcalling

A feature that will call an outside or inside number to inform a subscriber when a message has arrived in his or her mailbox. This feature is programmed by the System Administrator.

Overflow Coverage

The method of designating a secondary Group Calling or the Queued Call Console (hybrid/PBX only) to receive coverage calls when the number of calls waiting in the queue for the primary Calling Group is equal to or greater than the programmed Overflow Coverage Threshold. See also *Overflow Coverage Threshold*.

Overflow Coverage Threshold

The programmable number of calls that can wait in the queue for a Calling Group before overflow coverage calls are sent to another Calling Group. See also *Overflow Coverage*.

Port Allocation

The process of identifying which MERLIN LEGEND system jacks are connected to the MERLIN MAIL ports, and which MERLIN MAIL services are assigned to each port.

Return Time Interval

See *Transfer Return Interval*.

Selector Code

A one-digit number (1- 9) representing a menu option that callers select from the Main Menu or from a submenu to transfer them to an extension, a submenu, or an announcement. Selector Codes can also be reserved for direct dialing of individual extension numbers.

Submenu

A lower-level menu selected from the Main Menu or from another submenu that provides additional menu options or information to callers.

Submenu Script

The words callers hear when they select a submenu from the Main Menu or from another submenu. The script offers the list of options available on the submenu and gives the Selector Codes for callers to dial to reach the extension, submenu, or announcement they want.

Subscriber

A person whose extension is registered with the MERLIN MAIL system. Every subscriber has a Mailbox (the number is generally the same as the extension number) to receive messages left by callers when he or she cannot be reached.

Supervised Transfer

The MERLIN MAIL system monitors a call until it is answered. If the line is busy or is not answered, callers are given two options: choose another extension or leave a message. Supervised Transfer should be used only when a phone does not have coverage assigned to it. See also *Unsupervised Transfer* and *No Transfer*.

System Administrator

The person who updates and changes the MERLIN MAIL system to meet the company's requirements. The System Administrator is a registered subscriber and is also responsible for the Trouble Mailbox.

System Operator

The person who answers calls when callers press [0] or when callers do not enter a Selector Code within four seconds, if the Dial 0/Timeout Action Option is set for "transfer to System Operator."

System Parameters

Programmable settings that allow the MERLIN LEGEND Communications System and the MERLIN MAIL system to be customized according to business needs. Prior to installation, each system is programmed with factory-set system parameters.

Temporary Closure Greeting

A special greeting that plays to callers when a company closes unexpectedly because of inclement weather or an emergency.

Touch-Tone Duration

The Touch-Tone duration defines the length (specified in milliseconds) of Touch-Tone codes sent between a voice messaging system and the communications system.

Touch-Tone Gate

A programmable feature that determines quickly whether a caller is dialing from a rotary phone. When the Touch-Tone gate is set to "On," callers must dial a digit before the Main Menu plays. If the gate is set to "Off," callers who are calling from a rotary phone must listen to the entire Main Menu before their calls are transferred to the System Operator.

Touch-Tone Interval

The Touch-Tone interval is the interval (specified in milliseconds) between Touch-Tone codes sent between a voice messaging system and the communications system.

Transfer Redirect Extension

The Transfer Redirect Extension is the extension number to which calls to unassigned extensions can be redirected. The extension can be a queued call console (QCC), another extension, or the extension of a Calling Group.

Transfer Return Interval

The transfer return interval is the number of rings before a transferred call returns to the transfer originator.

Transfer Type

For a menu, Transfer Type specifies what action is taken when a caller enters a Selector Code. The actions are: calls are transferred to a predetermined extension, sub-menu, or announcement or to an individual extension requested by the caller. For a mailbox, it identifies the transfer type assigned to each mailbox (Supervised, Unsupervised or No Transfer).

Trouble Mailbox

This storage space is reserved for subscribers to report any problems they may experience with the MERLIN MAIL system so that the System Administrator can correct them. To report a problem, a subscriber logs into the Voice Mail, records a message, and addresses it to 9998. Whenever a message is left in the Trouble Mailbox, the System Administrator's message-waiting indicator lights.

Unsupervised Transfer

The Automated Attendant Service transfers calls without waiting to see if the extension requested is busy or is not answered. This reduces the time the MERLIN MAIL system port is tied up on a call and is the recommended type of transfer. See also *Supervised Transfer* and *No Transfer*.

Voice Mail Greeting

The greeting that plays to subscribers who call into the Voice Mail for messages.

Voice Mail Service

Allows subscribers to send messages to other subscribers, retrieve their own messages, record their own greetings, and create their own passwords.

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