9617
Telephone &
Personal
Call Manager
Online
User Guide

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AASTRA

List of Help Topics

The 9617 telephone and Personal Call Manager

Other applications

Welcome

Welcome to Aastra's 9617 telephone with Personal Call Manager.

The 9617 telephone is an advanced two-line telephone designed to work with Personal Call Manager software. Without the software, the 9617 telephone works on its own. When Personal Call Manager is running, you can control calls using either Personal Call Manager or the telephone.

The 9617 telephone and Personal Call Manager are designed to take full advantage of the latest services offered by your local telephone company—Caller ID and Call Waiting ID. (The names of these services may vary from area to area.)

For more information, refer to **Feature Highlights** on page 4.

Feature Highlights

The 9617 telephone features:

- a personal Directory that stores up to 100 contacts
- a Callers List and a Redial List that record incoming and outgoing calls
- two-line capability
- a three-line back-lit display that allows for features like Call Waiting ID
- advanced features such as Don't Disturb and Auto-busy Redial

Personal Call Manager features:

- an Address Book which allows you to store the names, addresses, and telephone numbers of an unlimited number of contacts on your computer
- the ability to export and import contact information to and from text files
- simplified multiline interaction so it is easier to manage multiple calls
- visual and audible caller identification
- advanced features such as call screening and pager notification

For more information, refer to **How the telephone and Personal Call Manager work together** on page 76.

Installing the 9617 telephone

The topics below take you step by step through the installation of the telephone. Follow them in the order that they appear.

Determining whether you have two telephone lines on one telephone cord

The 9617 telephone is a two-line telephone. Before you begin installing it, you need to know how your telephone lines are set up (you may have two telephone lines on one telephone cord). If you already know your setup, go to the next step: **Connecting the cords** on page 7. If you don't, follow the steps below first.

To determine your telephone line setup:

1   Connect one end of your telephone cord to the 1▯ jack on the telephone and the other end to the wall jack. Ensure nothing is plugged into the 2▯ jack on the telephone.

2   If you have not already done so, connect the small end of the power adaptor to the ⚠ jack on the back of the telephone, and plug the other end into a wall plug.

3   Read the telephone display. (If it prompts you to select a language, follow the directions on the telephone display to choose your language of choice.)

If only the time and date appear on the telephone display, you have two telephone lines on the telephone cord.

If the following message appears on the telephone display, you only have one line on that telephone cord:

```
Check line cord
Line 2
```

If you want to combine two lines onto one telephone cord, contact your telephone company.

Connecting the cords

Proceed with the following steps once you know whether both telephone lines are on one telephone cord. If you are not sure, refer to **Determining whether you have two telephone lines on one telephone cord** on page 6.

To connect the telephone cords:

1   Pass all cords except the coiled handset cord through the hole in the base as shown below.

Route the handset cord along this groove.
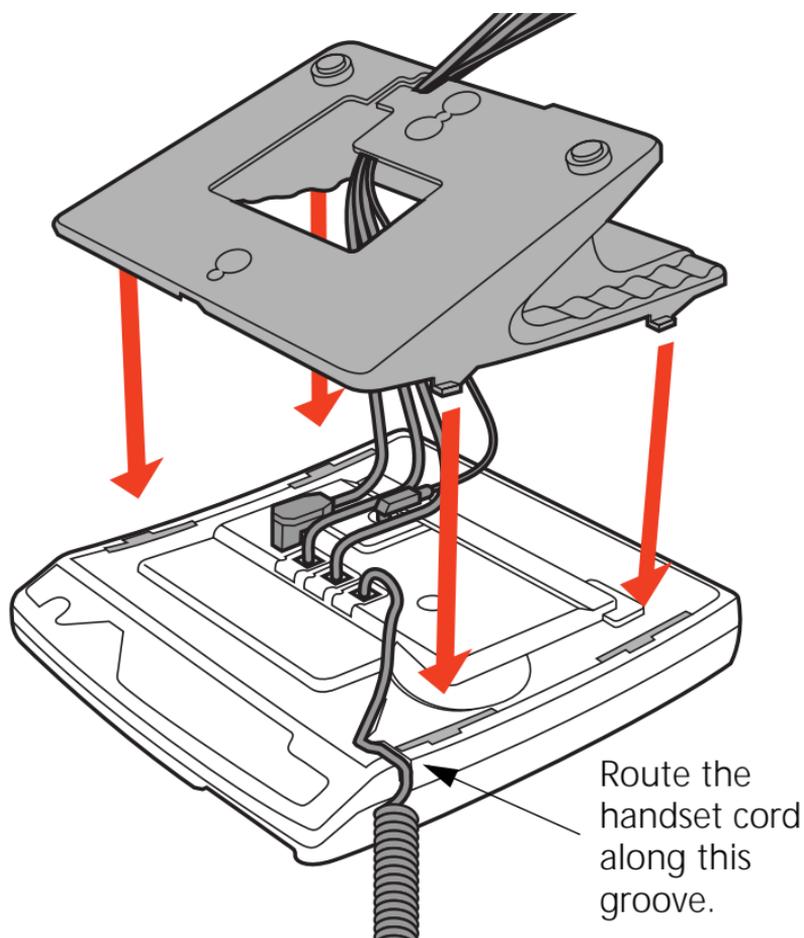
2 Connect the telephone cords.

Refer to the illustration of the telephone jacks on the right when following these steps.

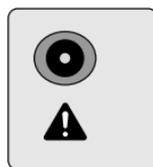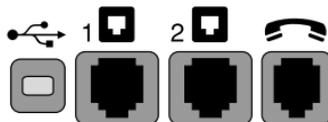You may find it helpful to refer to one of the following illustrations: **An illustration of a one telephone-cord setup** on page 10 or **An illustration of a two telephone-cord setup** on page 11.

If both telephone lines are on one telephone cord, plug one end of the telephone cord into the 1 ▢ jack, and plug the other end into the wall jack.

If your telephone lines are on separate telephone cords, plug one telephone cord into the 1 ▢ jack, and plug the other telephone cord into the 2 ▢ jack. Plug the other ends of the telephone cords into your wall jacks.

Attach one end of the coiled handset cord to the handset and the other end to the handset jack. Then route the handset cord along the groove leading off the side of the telephone as shown in the illustration on page 7.

3 Insert the hooked end of the thick USB cord into the USB jack on the back of the telephone. Insert the straight end into the ⟵⟶ jack at the back of your computer.

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4 Connect the small end of the power adaptor to the ⚠ jack on the back of the telephone, and plug the other end into a nearby electrical outlet.

To avoid potential electrical shock hazard or damage to the telephone, use **only** the manufacturer-supplied equipment and installation procedures. Specifically, use only 2 or 4 conductor modular teledapt plug/cords with this product, and an AC transformer that is CSA/UL or CSA-NRTL/C approved Class 2, Level C, rated.

Substitution of non-approved equipment will void the Aastra Telecom warranty.

If you want to attach a fax machine or modem, refer to **Connecting a fax machine or modem to the telephone** on page 387.

When ready, go to the next step: **Attaching the stand** on page 12.

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An illustration of a one telephone-cord setup

In a one telephone-cord setup, two telephone lines (each with a separate telephone number) are combined into one telephone cord. If this is your line setup, plug one end of the telephone cord into the 1 ▣ jack, and plug the other end into the wall jack. (The 2 ▣ jack is not used.)
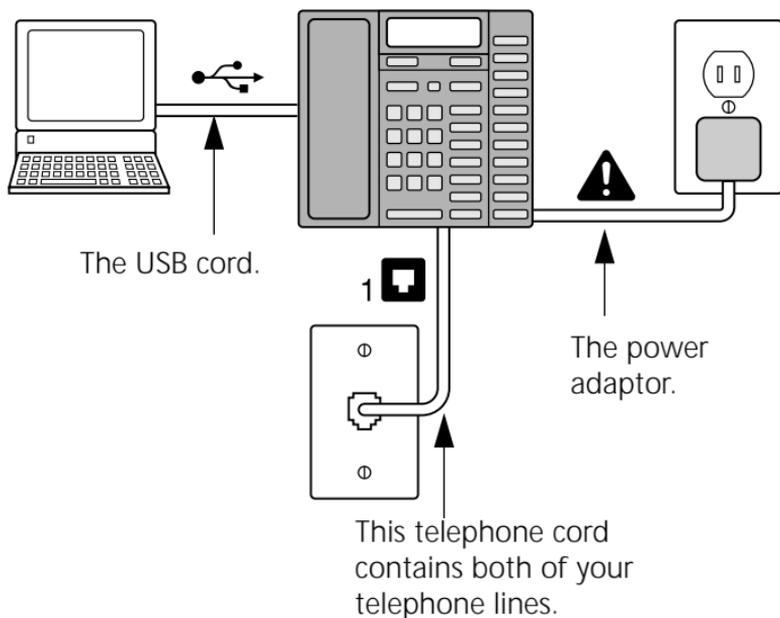
The USB cord.

1 ▣

The power adaptor.

This telephone cord contains both of your telephone lines.

An illustration of a two telephone-cord setup

In a two telephone-cord setup, each of your two telephone lines (each with a separate telephone number) is on a separate telephone cord. If you have this setup, you need to use two jacks. Plug one telephone cord into the 1 ■ jack, and plug the other telephone cord into the 2 ■ jack. Plug the other ends of the telephone cords into your wall jacks.

The USB cord.

1 ■   ■ 2
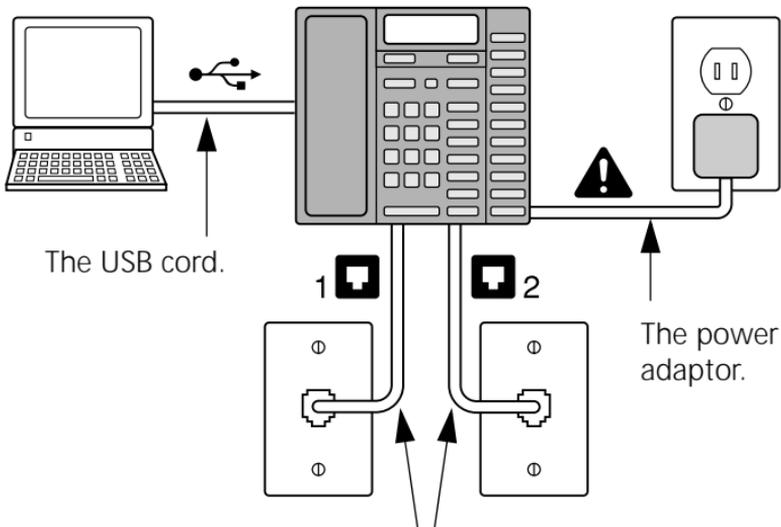
The power adaptor.

Each telephone line is on a separate telephone cord. For two lines, you have two telephone cords.

Attaching the stand

You have already routed the telephone cords through the hole in the stand, and routed the coiled handset cord in its groove. You can now attach the telephone stand.

How you attach the stand depends on whether you want to keep the telephone on a desk or mount it on a wall. When you have decided how you want to store the telephone, choose one of the topics below.

- **Desk-mounting the telephone** on page 13
- **Wall-mounting the telephone** on page 15

Desk-mounting the telephone

To mount the telephone on the desk:

1 Lower the stand as shown below into the slots on the back of the telephone.
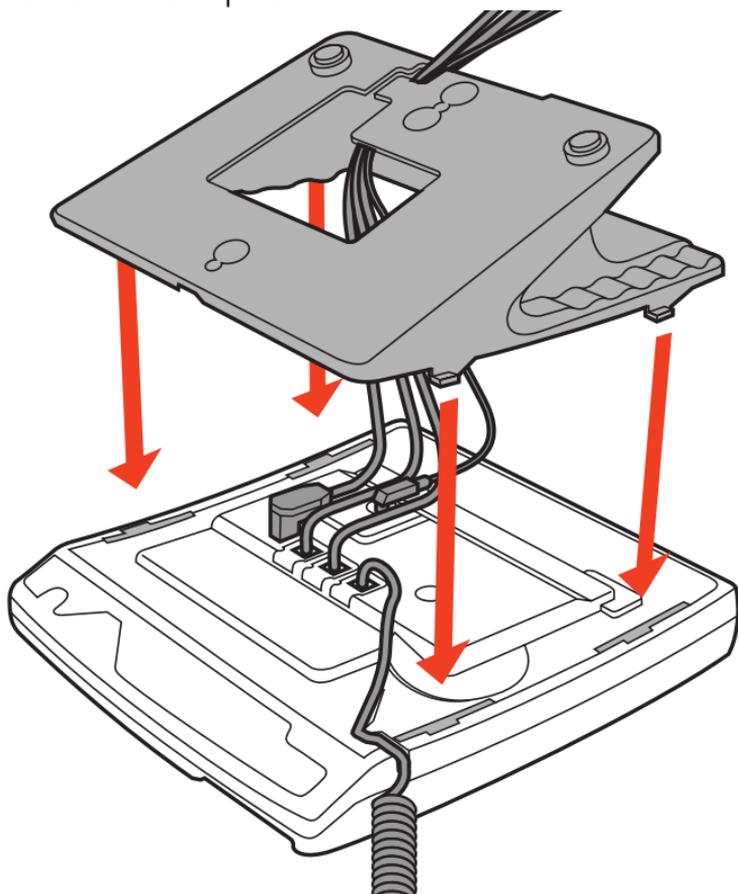
2 Slide the stand in the direction shown below until it clicks into the locked position.
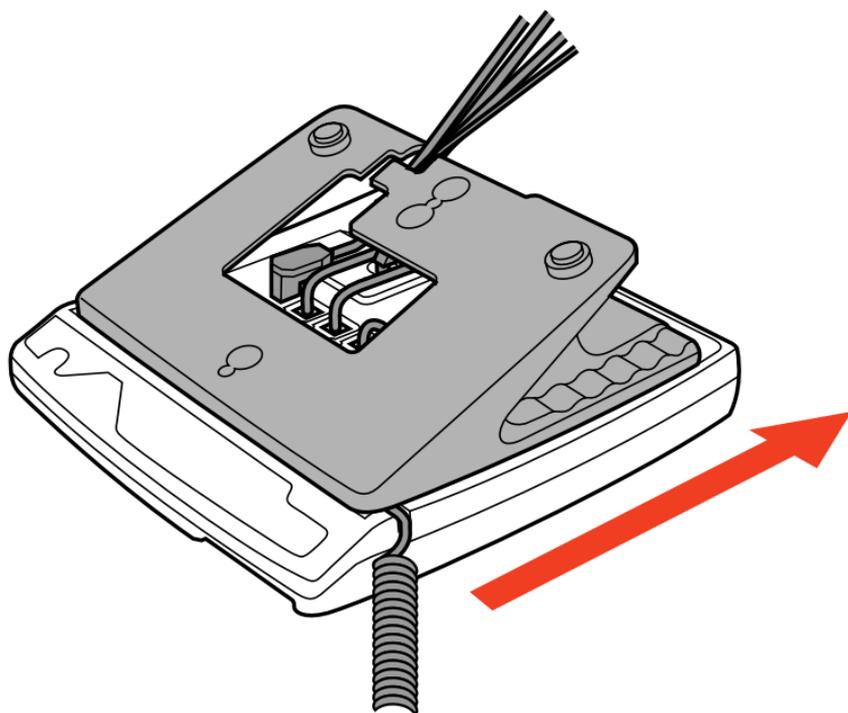
When ready, go to the next step: **Inserting the number card and lens** on page 17.

Wall-mounting the telephone

When wall-mounting the telephone, it is recommended that you use a wall-mounting plate which is available through your telephone company or at a local retailer. You may also find it easier to wall-mount the telephone if you purchase one or two short 20 cm (8″) telephone cords and use them in place of the long telephone cord(s).

To wall-mount the telephone:

1 Lower the stand into the slots on the back of the telephone as shown below by the arrows.
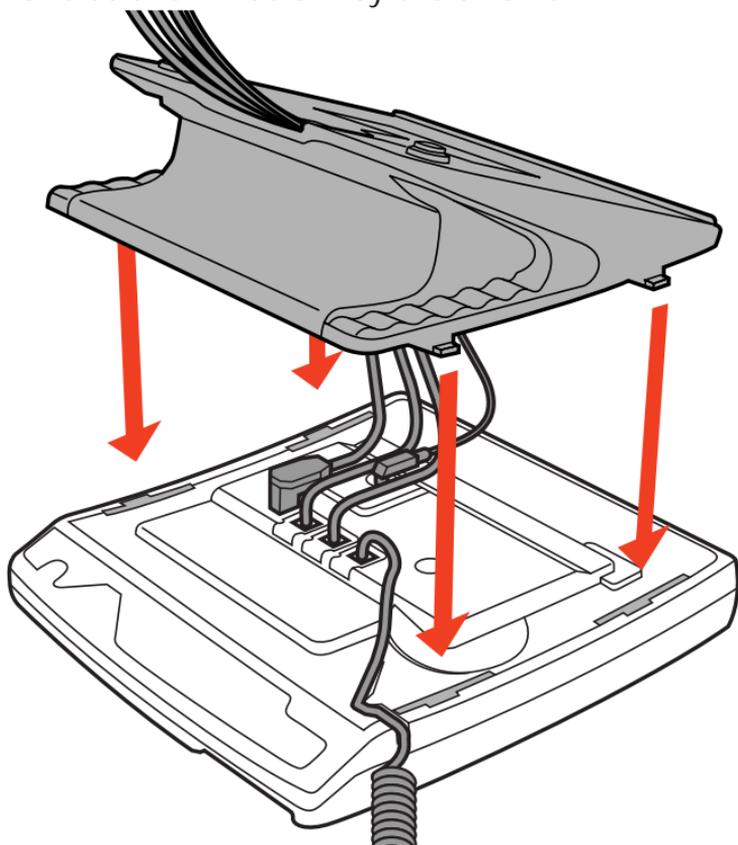
2 Slide the stand in the direction shown below until it clicks into the locked position.
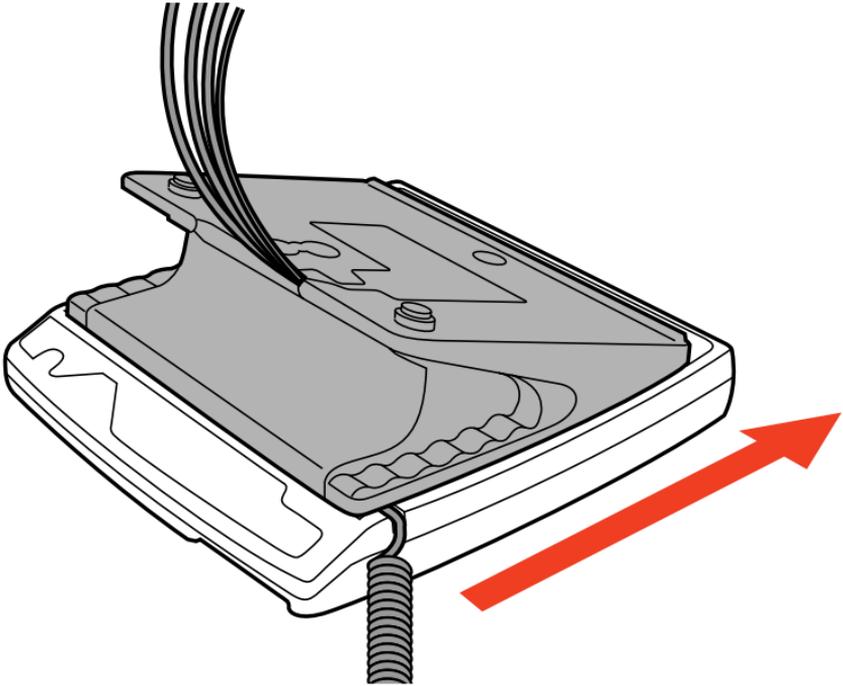
3 Line up the keys on the wall mounting plate with the key holes on the base of the 9617 telephone as shown. Push the phone onto the wall mounting plate, and then push down to secure the telephone into place. Tuck the excess cord inside the stand itself.
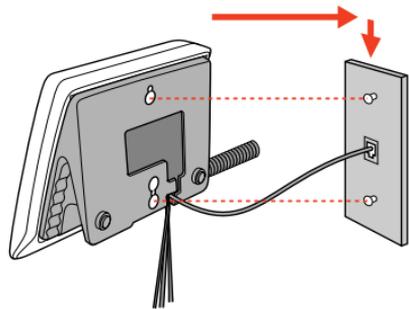
When ready, go to the next step: **Inserting the number card and lens** on page 17.

Inserting the number card and lens

The 9617 telephone comes with a small paper number card and a clear plastic number card lens. This card allows telephone users to know what telephone number they are calling from.

To insert the number card and lens:

1 Write your telephone number on the paper number card.

2 Place the number card into the slot underneath the handset.

3 Bend the clear plastic lens and place it on top of the number card in the slot.

When ready, go to the next step:

Adjusting the telephone display

When you have finished installing the telephone, adjust the angle of the telephone display to your liking.

Press ⎡*Contrast*⎤ to adjust the contrast. The contrast feature allows you to adjust the brightness of the display.

When ready, go to the next step: **Plugging in the telephone for the very first time** on page 19.

Plugging in the telephone for the very first time

The very first time you plug-in your 9617 telephone, a message appears asking you to make a language selection. Simply follow the directions on the telephone display.

Your telephone also runs a test to ensure that the line cords are connected properly. If the test fails, the message `Check line cord` appears on the telephone display, and the line that is not connected is identified. Make sure that all connections are fastened securely. For more information, refer to **Clearing the Check line cord message** on page 48.

You can now change the display language or set the date and time. For more information, refer to the following topics:

- **Changing the telephone display language** on page 20
- **Setting the date and time on the telephone** on page 21

Changing the telephone display language

You may wish to change the language of the messages and prompts that appear on the display of your 9617 telephone.

To change the display language on the telephone:

1 Press the Options key. (To see the location of the Options key, refer to **The M9617 telephone keys and lights** on page 29.)

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use [↓ | ↑] to scroll to option number 1 or press [0] [1].

4 Press [✱]. The current language selection is shown by a checkmark.

5 Press [↓ |] until you see the desired language.

6 Press [✱] to select the language that appears on the display.

7 Press [Rls].

Note: You cannot change the display language for the Personal Call Manager software.

Setting the date and time on the telephone

If you subscribe to a Caller ID service from your telephone company, the date and time displayed on the 9617 telephone are set automatically when you receive your first telephone call.

Only if you do not subscribe to a Caller ID service must you set the date and time by following the steps below.

To manually set the date and time:

1   Press the Options key. (To see the location of the Options key, refer to **The M9617 telephone keys and lights** on page 29.)

2   Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3   Use ⎡ ↓ ⎢ ↑ ⎤ to scroll to option number 2 or press ⎡0⎤ ⎡2⎤.

4   Press ✱ .

5   Follow the instructions on the telephone display. Press ⎡ ⎢ → ⎤ to backspace and delete numbers, and press ⎡*Save*⎤ to save each entry.

6   Press ⎡*Rls*⎤.

Note: To revert back to the automatic date and time setting after you have manually set the date and time, unplug the power adapter and then plug it back in again. The next telephone call you receive will then set the date and time automatically (if you subscribe to a Caller ID service).

Telephone network services you should subscribe to

The 9617 telephone and Personal Call Manager are designed to take advantage of many telephone network services. The recommended services are listed below. To subscribe to these services, contact your local telephone company.

Note: The names of these services may vary from area to area. Contact your telephone company for more information.

Caller Identification (Caller ID)

When you subscribe to this service, the telephone company sends you the name and number of people who call you. For more information, refer to **Answering a call using your telephone** on page 264 and **Caller ID and Personal Call Manager** on page 272.

Call Waiting Identification (Call Waiting ID)

This service is similar to Caller ID, except it applies to Call Waiting callers. When you subscribe to this service, the telephone company sends you the name and number of Call Waiting callers. For more information, refer to **Answering a Call Waiting call using the telephone** on page 266.

Three Way Calling

When you subscribe to this service, you can conference two callers on one line of the 9617 telephone. This feature is useful for making conference calls. For more information, refer to **Making a Three Way Call** on page 297.

Starting and Exiting Personal Call Manager

The following sections give an overview of starting and exiting Personal Call Manager.

■ **The very first time you start Personal Call Manager** on page 24

■ **Starting Personal Call Manager** on page 25

■ **Exiting Personal Call Manager** on page 26

Once you have launched the application, you need to set up Personal Call Manager. Refer to **Setting up Personal Call Manager** on page 123 for more information.

The very first time you start Personal Call Manager

To start Personal Call Manager:

1 If you see a shortcut for Personal Call Manager (shown on the right) on your desktop, double-click on it.

OR

1 Click on the **Start** button and point to the **Programs** menu item. A submenu appears.

2 Point to the **Personal Call Manager** menu item. A submenu appears.

3 Click on the **Personal Call Manager** menu item.

The very first time you launch Personal Call Manger, the **Choose a TAPI Line** dialog box appears. For information on choosing a TAPI line, refer to **Specifying the TAPI line used by Personal Call Manager** on page 124.

When you have chosen a TAPI line, the **Dialing Properties** dialog box appears. Use this dialog box to specify the dialing properties for the location you are dialing from (refer to **Specifying dialing properties for the location you are dialing from** on page 125).

For more information, refer to the following topics:

- **Starting Personal Call Manager** on page 25
- **Getting to know Personal Call Manager** on page 53
- **Personal Call Manager preferences** on page 127

Starting Personal Call Manager

To start Personal Call Manager:

1 If you see a shortcut (shown on the right) for Personal Call Manager on your desktop, double-click on it.

OR

1 Click on the **Start** button and point to the **Programs** menu item. A submenu appears.

2 Point to the **Personal Call Manager** menu item. A submenu appears.

3 Click on **Personal Call Manager** menu item.

When the application launches, the Personal Call Manager icon appears on the task tray and task bar, and, by default, the Personal Call Manager main window appears.

Synchronization on startup

Each time you start Personal Call Manager, the software synchronizes with the information in the telephone. For more information, refer to **How the telephone and Personal Call Manager work together** on page 76 and **Changing the Startup synchronization setting** on page 134.

Exiting Personal Call Manager

You can exit Personal Call Manager from the task tray or the main window.

To exit Personal Call Manager using the task tray:

1 Right-click on the Personal Call Manager icon in the task tray.

| Start | Personal Call Manager | | 9:16 AM |

The task tray

2 Click on the **Exit** menu item.

To exit Personal Call Manager using the main window:

1 Click on the **File** menu.

2 Click on the **Exit** menu item.

You can also exit Personal Call Manager by clicking on the close window button (shown on the right) in the top right hand corner of the Personal Call Manager main window or by typing **ALT**+**F4** on the keyboard.

Becoming familiar with the telephone and software

The first two sections listed below help you get acquainted with the telephone and Personal Call Manager. Once you are familiar with their features, read the third section to learn more about how they enhance each other.

Refer to the following topics:

- **Getting to know the M9617 telephone** on page 28

- **Getting to know Personal Call Manager** on page 53

- **How the telephone and Personal Call Manager work together** on page 76

Getting to know the 9617 telephone

The 9617 telephone has a three-line backlit display and several indicator lights.

For more information, refer to the following topics:

The 9617 telephone keys and lights

Adjustable display

Set indicator light

Left/right arrows

Sliding panel

Down/up arrows

Options key

Contrast

Directory

Callers

Save

Delete

Hold   Rls   Link

Redial

Dial

Conference

Line 2

Line 1

Handsfree Mute

Handsfree/Mute indicator light

Line indicator lights

6 memory keys

For descriptions of how these keys work, refer to **Telephone key descriptions** on page 30.

Telephone key descriptions

| *Contrast* | Selects one of eight display contrast settings. |

| *Directory* | Stores and accesses the names and telephone numbers of up to 100 contacts. |

| *Callers* | Accesses a list of the last 100 calls you have received, starting with new calls. |

| *Save* | Stores numbers and names in the Directory and in memory keys. |

| *Delete* | Erases memory keys, deletes the Redial List, and deletes items in the Directory and Callers List. |

| ↓ ↑ | Moves up and down through any list such as the Options List, Directory, Callers List, or Redial List. |

| ← | Backspaces and erases when you are predialing and when you are adding or changing numbers and names in the Options List, Directory, or memory keys. |

30
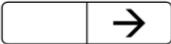
→	Adds a space when you are entering names in the Directory or in memory keys, and allows you to view multiple status messages on the telephone display.
Hold	Puts the call on hold and inserts a pause between digits you are storing in the Directory or memory keys.
Rls	Releases (hangs up) a call and exits the Options List, Callers List, Redial List or Directory.
Link	Accesses network features such as Call Waiting. (The Link key is also referred to as the Flash key.)
Redial	Accesses a list of the last ten numbers you dialed.
Dial	Dials the telephone number on the telephone display on your prime line.
Conference	Joins two calls to create a conference call.
Line x	Selects Line 1 or Line 2 and turns on Handsfree mode if you have not picked up the handset. It also dials the telephone number on the telephone display.

continued...

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`Handsfree Mute`	Activates the speaker and microphone so you can listen and talk without using the handset. Also mutes the microphone so that your caller cannot hear you.
◀) ◀»)	Adjusts the receiver, speaker, and ringer volume.
	Memory keys store numbers, names, and features. You label these keys with the name, number or feature you store in them by using the paper key cap label sheet provided.
	The unlabeled Options key is hidden under the sliding panel. This key accesses the Options List, which contains options that customize the features of your telephone. Refer to **Using the Options List to customize the M9617 telephone** on page 81 for more details.

Telephone display and light messages

The 9617 has a backlit three-line display that uses icons and messages for your call information.

For more information, refer to the following topics:

- **General telephone display messages** on page 34
- **Light messages - what they mean** on page 37
- **Extension in Use notification on the telephone** on page 41
- **Viewing multiple display and light messages** on page 42
- **The Callers List** on page 43
- **Voice Mail notification** on page 46
- **The Clear Message Waiting option** on page 47
- **Clearing the Check line cord message** on page 48

General telephone display messages

The table below shows some common display messages.

Common General Display Messages (page 1 of 3)

Message	What it means
->	There is more information to be shown on the telephone display. Press [→] to see it.
Check line cord Line 1 or Line 2	The telephone line indicated is not connected properly.
Directory empty Use SAVE to add	The Directory remains empty until you save numbers and names in it.
Directory full No changes made	The Directory has a 100 entry limit. If you want to add another item, first delete an item you no longer use to make room for the new one.
Extension in use	Someone on an extension telephone is using the line you have selected.
Feature ON	The FeatureLight On key has been pressed and the code dialed out. To turn off the feature and the light, press the FeatureLight Off key and lift the handset or press [Handsfree Mute], [Dial], or [Line x]. See **Using feature keys for network telephone services** on page 356.

Common General Display Messages (page 2 of 3)

Message	What it means
<Forwarded Call	The incoming call is forwarded from another telephone.
Key is locked	The memory key is factory-programmed and cannot be erased or reprogrammed. Program a different memory key.
⊕	The caller is calling from outside your local area (i.e., long distance).
Make calls first or Make second call	You must make two calls before you press *Conference*.
Message Waiting Line x	Your Voice Mail service has a message for you. To subscribe to the Voice Mail service, contact your telephone company.
Conference held	A conference call is on hold.
Press Conference	This appears when you try to take a held conference call off hold by pressing *Hold*. Press *Conference* to take the conference calls off hold.
Press line key	This appears when you press *Hold* and your call is already on hold. Press *Line x* to retrieve the held call.

Common General Display Messages (page 3 of 3)

Message	What it means
Private number or Private name	The caller has requested that the telephone company not deliver his or her name or telephone number.
Redial List is empty	You pressed [Redial] but there are no numbers in the Redial List to dial.
Ringer is OFF Line x	The ringer volume is turned off for that line. To turn it on, press the volume bar.
Unknown name or Unknown number	The name or number is unavailable.
>...xxxxxxxxxxxx or ...xxxxxxxxxxxx	The telephone number is longer than the telephone display.
XX New Callers	New callers have been added to the Callers List since you last checked it.
☎⁾⁾	Indicates an incoming call.
ℂ▲	Indicates that the phone is off hook.
ℂ▲⁾⁾	Indicates an incoming Call Waiting call.

Light messages - what they mean

The 9617 telephone set indicator light turns on to alert you when the telephone rings, a feature is on, or when someone on an extension telephone is using the same line as you. Indicator lights beside the line keys and `Handsfree Mute` key show you their status (e.g., whether they are being used).

For more information, refer to the following topics:

- **Set indicator light messages** on page 38
- **Line indicator light messages** on page 39
- **Handsfree/Mute indicator light messages** on page 40

Set indicator light messages

To see the location of the set indicator light, refer to **The M9617 telephone keys and lights** on page 29.

Set indicator light status	Telephone status
The light is on.	Someone on an extension telephone is using one of your telephone lines. Refer to **Extension in Use notification on the telephone** on page 41 OR You have pressed a FeatureLight ON key and the feature is active. Refer to **Using FeatureLight keys** on page 363
The light is flashing slowly.	You have a have a new Voice Mail message. Check your Voice Mail. To receive voice messages, you must subscribe to Voice Mail services from your telephone company.
The light is flashing quickly.	You have an incoming call. Refer to **Answering calls** on page 263.

Line indicator light messages

To see the location of the line indicator lights, refer to **The M9617 telephone keys and lights** on page 29.

Line indicator light status	Line status
The light is on.	The line is in use.
The light is flashing.	The line is on hold.
The light is flashing very quickly.	An incoming call is coming in on that line.

Handsfree/Mute indicator light messages

To see the location of the Handsfree/Mute indicator light, refer to **The M9617 telephone keys and lights** on page 29.

Handsfree/Mute indicator light status	Handsfree/Mute status
The light is on.	The telephone is in Handsfree mode.
The light is flashing quickly.	The Handsfree/Mute microphone is muted so your caller cannot hear you.

For more information on Handsfree mode and muted calls, refer to **Handsfree calls** on page 261 and **Muting a Handsfree call** on page 262.

Extension in Use notification on the telephone

Line indicator lights let you know whether a line is available for you to use. When another extension is using a line, the line indicator light for that line (located beside the line key) turns on. To see the location of the Line indicator lights, refer to **The M9617 telephone keys and lights** on page 29.

When you are on a call and someone on an extension telephone tries to use your line, the set indicator light (the light above the [*Link*] key) turns on. The light remains on and the message Extension in use appears until the person at the other extension hangs up.

Extension in Use and the Fax switch feature

When you lift the handset or press [**Handsfree Mute**], the 9617 telephone automatically selects the prime line (for information on the prime line feature, see **Changing the prime line** on page 240).

If your prime line is Line 2 and a fax switch peripheral device (e.g,. a fax machine) is using that line, Line 2 is not selected when you pick up the handset. Instead, the message Extension in use / Press line key appears on the telephone display.

Then, if you press [*Line 1*], you access Line 1 and can make a call. If you press [*Line 2*], you access Line 2 and may interrupt the call to the peripheral.

For more information, refer to **Extension in Use notification in Personal Call Manager** on page 73.

Viewing multiple display and light messages

There are several messages that can be active at any time, such as date and time, `X New Callers`, `Feature ON`, `Message Waiting`, and `Ringer is OFF`. When more than one of these messages is active, the telephone display shows the most recent message and an arrow beside it (e.g., `1 New Caller →`).

You can view the other messages by pressing [→   ]. Each time you press [→   ], the telephone display shows the next active message (and, if applicable, the set indicator light associated with the message).
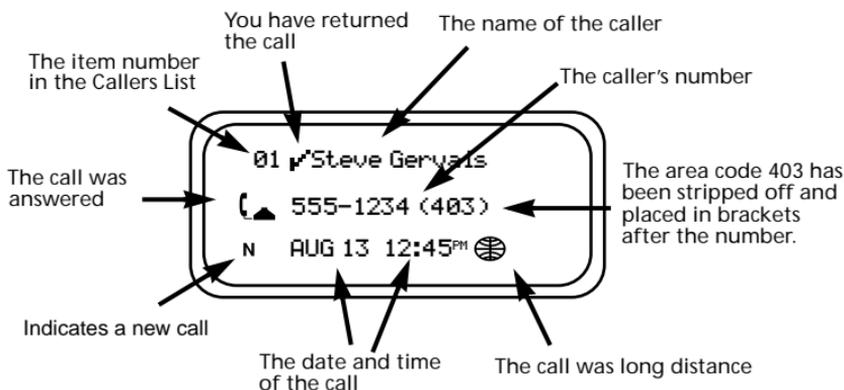
If you are on Line 1 and a call comes in on Line 2, an arrow (`→`) appears on the screen. To see the Caller ID information, press [→   ].

The Callers List

The 9617 telephone Callers List logs your incoming calls. It can hold up to 100 calls. For each call, it logs the caller's name and number (if available), the time of the call and whether the call was long distance.

To view the Callers List, press [Callers].

A sample Callers List entry is shown below.

You have returned the call

The name of the caller

The item number in the Callers List

The caller's number

01 ☛Steve Gervais

The call was answered

(📞 555-1234 (403)

The area code 403 has been stripped off and placed in brackets after the number.

N   AUG 13 12:45ᴘᴹ 🌐

Indicates a new call

The date and time of the call

The call was long distance

You must subscribe to Caller ID services from your local telephone company to receive caller information such as a name or number.

Note that even if you subscribe to Caller ID, you may sometimes receive "Private name", "Unknown name", "Private number" or "Unknown number" instead of the caller's actual name or number.

For more information, refer to **Callers List telephone display messages** on page 44.

Callers List telephone display messages

Common Callers List Display Messages (page 1 of 2)

Message	What it means
Callers List is empty	The Callers List has not logged any calls, or you've deleted all the calls in the Callers List. (Your telephone does not record incoming calls until you subscribe to the Caller ID service.)
Calls bumped=xx	A number (xx) of old calls have been automatically removed from the Callers List to make room for new calls. The Callers List limit is 100 calls.
<Forwarded	The call was forwarded from another location.
⊕	The call was long distance.
No number	You are trying to call someone in your Callers List and the number is "Unknown" or "Private."
Private number or Private name	The caller has requested that the telephone company not deliver his or her name or telephone number.
Unknown name or Unknown number	The name or number is unavailable from the telephone company.

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Common Callers List Display Messages (page 2 of 2)

Message	What it means
01.✓Unknown Name 555-5555	The checkmark (✓) means that you have returned the call from the Callers List.
N MAR04 3:30pm	N means a new call.
...xxxxxxxxxxxxx	An ellipse "..." followed by x's means the number is longer than the telephone display.
☎	Indicates an unanswered call in the Callers List.
📞	Indicates an answered call in the Callers List.
📞))	Indicates a Call Waiting call in the Callers List.

Voice Mail notification

When you have a Voice Mail message, the 9617 telephone's red indicator light (located above the `Link` key) flashes slowly and the telephone display shows:

Message Waiting
Line x

or

Message Waiting
Line 1 Line 2

In Personal Call Manager, the message waiting icon (shown on the right) flashes in the task tray when you have a Voice Mail message.

Tip: Voice Mail Assistant is an application, installed with Personal Call Manager, which allows you to access voice mail from your computer. To start this program, right-click on the flashing Message Waiting icon in the task tray and then click on the **Start VoiceMailAssist** menu item. For more information, refer to **The Voice Mail Assistant** on page 392.

Once you have listened to your message(s), the indicator light stops flashing and the Message Waiting display message disappears. If the message does not disappear and the light continues flashing, you can use the Clear Message Waiting option to remove them. Refer to **The Clear Message Waiting option** on page 47 for more information.

Contact your local telephone company to find out how you can subscribe to Voice Mail services.

The Clear Message Waiting option

There may be times when Message Waiting appears on the telephone display and the set indicator light continues flashing when there are no new Voice Mail messages.

If so, you can turn the display message and light off using the Clear Message Waiting option.

To clear message waiting:

1   Press the Options key.

2   Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3   Use $\boxed{\downarrow \quad \uparrow}$ to scroll to option number 6 or press $\boxed{0}$ $\boxed{6}$.

4   Press $\boxed{*}$ to clear message waiting.

5   Press $\boxed{Line\ x}$ for the line with the Voice Mail service.
If required, repeat steps 4 and 5 for the other line.

Note: This option only applies if you subscribe to Voice Mail services from your telephone company.

Clearing the Check line cord message

There may be times when Check line cord appears on the telephone display and you want to clear this message. For example, you may have only one line cord connected.

You can remove the Check line cord message from the telephone display by turning off the Check Line Cord option for the line that is not connected.

To enable or disable the check line cord message:

1   Press the Options key.
2   Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.
3   Use ⎟ ↓ ⎟ ↑ ⎟ to scroll to option number 13 or press ⎣1⎦ ⎣3⎦.
4   Press ⎣✱⎦.
5   Press ⎣*Line x*   ⎦ of the line the Check line cord message applies to.
6   Press ⎣✱⎦ to enable the Check line cord message. Press ⎣#⎦ to disable the Check line cord message.
7   Press ⎣*Rls*⎦.

Controlling the volume of your telephone

You can control the volume of the ringer, handset speaker and Handsfree speaker. You can also choose the ring tone for the 9617 telephone ringer.

For more information, refer to the following topics:

- **Setting the ringer volume** on page 50
- **Choosing the ring tone for the ringer** on page 51
- **The handset and Handsfree speaker volume** on page 52

Setting the ringer volume

To adjust the ringer when the telephone is idle:

1   Press one side of $\boxed{\blacklozenge}$ $\boxed{\blacklozenge\!\!\flat}$.
2   Press $\boxed{Line\ x}$ for the line you want to adjust the ringer for.
3   Press the right side of $\boxed{\blacklozenge}$ $\boxed{\blacklozenge\!\!\flat}$. The ringer sounds. Continue pressing it until you reach the desired ring volume. (Pressing the left side decreases the volume and pressing the right side increases the volume.)
4   Press $\boxed{Save}$.

To adjust the ringer volume when the telephone is ringing on one line:

1   Press the left or right side of the volume bar $\boxed{\blacklozenge}$ $\boxed{\blacklozenge\!\!\flat}$ to adjust the ringer volume for the ringing line.

To turn the ringer off:

1   Ensure the phone is not off the hook (i.e., ensure the handset is resting in the cradle and the Handsfree indicator light is off).
2   Press $\boxed{\blacklozenge}$ $\boxed{\blacklozenge\!\!\flat}$.
3   Press $\boxed{Line\ x}$ for the line you want to adjust the ringer for.
4   Press the left side of $\boxed{\blacklozenge}$ $\boxed{\blacklozenge\!\!\flat}$. Continue pressing the left hand side until the ringer is off.
5   Press $\boxed{Save}$. `Ringer is OFF` and the line affected appear on the telephone display.

Choosing the ring tone for the ringer

You can choose one of four different ring tones for each line independently.

To select the ring tone:

1 Make sure that the ringer is turned on (see **Setting the ringer volume** on page 50).

2 Press the Options key.

3 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

4 Use ⌊ ↓ ⌊ ↑ ⌋ to scroll to option number 4 or press ⌊0⌋ ⌊4⌋.

5 Press ⌊✱⌋.

6 Press ⌊*Line x*   ⌋ for the line you want to set the ring tone for. The current ring tone sounds.

7 Use ⌊ ↓   ⌋ until you hear the ring tone you want to select. When selecting the ring tone, press the left or right side of ⌊◀)⌋   ⌊◀))⌋ to adjust the volume.

8 Press ⌊*Save*   ⌋ when you are satisfied with ring tone and ringer volume. Repeat steps 5-8 for the other line if desired.

9 Press ⌊*Rls*⌋.

The handset and Handsfree speaker volume

The handset volume

To adjust the handset volume:

1 While you are on a call, press the left or right side of the volume bar ◄ ◄)) . The handset volume returns to normal after you have completed your call.

The speaker volume

To adjust the speaker volume:

1 While you are listening to the Handsfree speaker, you can press the left or right side of the volume bar ◄ ◄)) . The speaker volume remains at the volume level you last selected until the next time you change it.

Getting to know Personal Call Manager

Personal Call Manager provides an easy-to-use computer interface for the 9617 telephone.

For more information, refer to the following topics:

Startup icons

When Personal Call Manager starts up, two icons are added to the screen: the taskbar icon and the task tray icon. These two icons have distinctly different functions.

Use the taskbar icon to open the Personal Call Manager main window when it is minimized or hidden behind other application windows.

The task tray icon provides quick access to Personal Call Manager functions when you are using other programs.

The diagram below shows where each icon is found.

| Start | Personal Call Manager | | 9:16 AM |

The task bar icon   The task tray

For more information, refer to **The task tray icon** on page 55.

The task tray icon

The Personal Call Manager icon (shown on the right) appears in the task tray. This task tray icon provides quick access to Personal Call Manager functions when the main window is closed.

If you turn on the Don't Disturb feature, this icon changes (refer to **Don't Disturb and Personal Call Manager** on page 327).

Note: If you want to use the task tray icon when you are in Personal Call Manager, first click outside the Personal Call Manager window to deselect Personal Call Manager.

Start | Personal Call Manager   9:16 AM

The task tray

When you let the mouse pointer hover over the Personal Call Manager icon, the number of current calls appears.

When you right-click on the Personal Call Manager icon, a menu appears that allows you to:

- set Personal Call Manager preferences;
- start the Voice Mail Assistant application
- open the Personal Call Manager main window; or
- exit from Personal Call Manager.

When you single click on the Personal Call Manager icon, the task tray menu appears. From the task tray menu you can perform most basic call functions.

For more information, refer to **The task tray menu** on page 56.

The task tray menu

You can use the task tray menu to perform most basic call functions, such as making and answering calls, placing calls on hold and creating conference calls with two other callers (a three-call conference).

The Personal Call Manager task tray menu is divided into two main sections, the upper and the lower.

The upper portion of the menu contains the current calls and their status icons. These icons are explained below. (These icons also appear in the **Calls** menu.) If there are no calls, the upper portion of the menu does not appear.

Icons in the Task Tray or Calls Menu (page 1 of 2)

Icon	Call Status	Description
	Active Call	Appears beside the call you are currently on.
	Held Call	Appears beside calls that are on hold.
	Conference Call	Appears beside the calls that are part of a conference call.
	Held Conference	Appears beside calls that are part of a conference that is on hold.

Icons in the Task Tray or Calls Menu (page 2 of 2)

Icon	Call Status	Description
	Ringing	Appears beside calls that you have not answered.

The lower portion of the menu contains the following features:

- **Callers List** – a list of the last ten calls you received that you can use to return calls (see **The Callers List in Personal Call Manager** on page 353)

- **Redial List** – a list of the last ten telephone numbers you dialed that you can use to redial telephone numbers (see **The Redial List in Personal Call Manager** on page 354)

- **Quick Dials** – a list of telephone numbers stored in the **Quick Dials** folder that you can use to make calls (see **The Quick Dials folder** on page 160)

- **Manual Dial** – a command that lets you dial a telephone number using the keyboard (see **Dialing using the Dial dialog box** on page 250)

- **DND** – a command that turns the Don't Disturb feature on or off (see **Don't Disturb and Personal Call Manager** on page 327)

The Main Window

The main window allows you access to all of Personal Call Manager's features.

Opening the main window

When you start Personal Call Manager, the main window appears. By default, the window remains open.

To maximize the main window (if it is closed):

■ Click on the Personal Call Manager icon in the task-bar.

   OR

■ Right-click on the Personal Call Manager icon in the task tray and then click on the **Open** menu item.

If you do not want the main window to remain open, you can set the Startup Option so that the window minimizes to an icon on the task bar when you launch Personal Call Manager. (See **The Startup Option** on page 130.)

For more information, refer to the following topics:

■ **The parts of the main window** on page 60

■ **Closing the main window** on page 59

Closing the main window

When you close the main window, it minimizes to an icon on the taskbar as shown below.

Start | Personal Call Manager | 9:16 AM
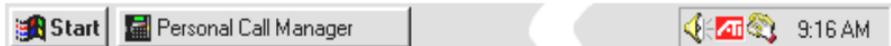
To close the main window (if it is open):

■ Click on the minimize button (shown on the right) in the top right corner of the window.

When you close the main window, you can still control your telephone calls from the Personal Call Manager icon in the task tray.

For more information, refer to the following topics:

■ **The task tray icon** on page 55

■ **The task tray menu** on page 56

■ **Exiting Personal Call Manager** on page 26

The parts of the main window
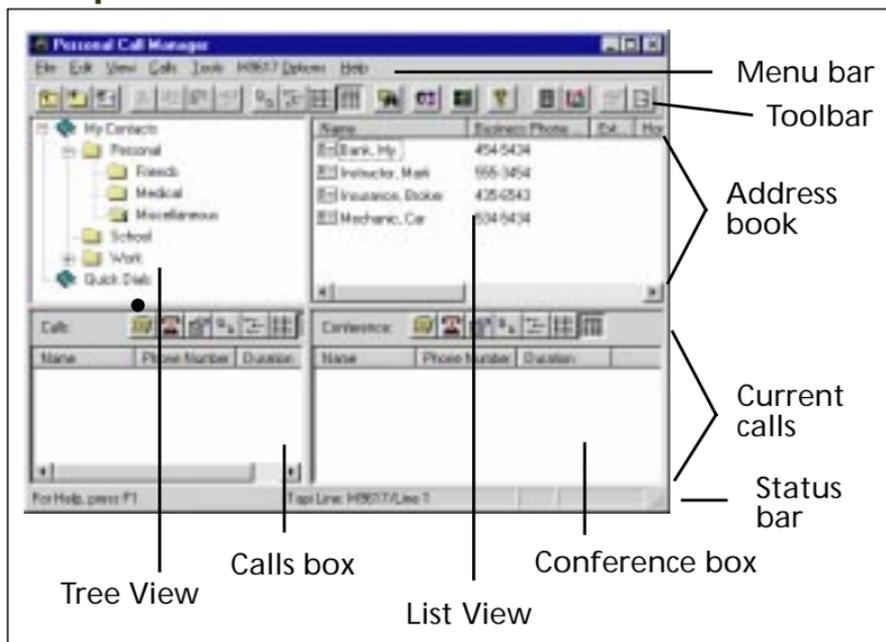
The Personal Call Manager main window is made up of the following:

- the **Menu bar**
- the **Toolbar**
- the **The Address Book section**
- the **The Current Calls section**
- the **Status bar**

All of these components, except the Menu bar, can be turned on or off to suit your needs. You can resize any of the sections in the main window by dragging their borders. You can also move the toolbar by dragging it to a new position.

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Menu bar

You use the menus on the menu bar to access all of the features available in Personal Call Manager. The menu bar is always visible on the main window.

Menu	Description
File	Lets you add new contacts and folders, set properties for contacts, import and export contact information from and to text files and exit Personal Call Manager.
Edit	Lets you cut, copy, paste and delete contacts and folders; lets you undo the last action you have performed.
View	Lets you choose how contacts are displayed; lets you show or hide the toolbar and status bar.
Calls	Lets you make and answer calls, access call lists and turn Do Not Disturb on or off. This menu is identical to the task tray menu. See **The task tray menu** on page 56.
Tools	Lets you set dialing properties and preferences, configure a TAPI line and find contacts.
9617 Options	Lets you access the **Quick Dial Manager** and **Memory Keys** dialog boxes, and hide the 9617 Options part of the toolbar.
Help	Lets you view help topics and the software version you are using.

Toolbar

The Personal Call Manager toolbar has two sections, the main toolbar and the 9617 Options toolbar.

These toolbar sections contain buttons that provide quick and easy access to Personal Call Manager functions.

To hide or display both toolbar(s):

1 Click on the **View** menu.

2 Click on the **Toolbar** menu item. The combined toolbar either appears or disappears.

When the toolbar is visible, a checkmark (✔) appears beside the **Toolbar** menu item in the **View** menu.

To show or hide the 9617 Options toolbar:

1 Click on the **9617 Options** menu.

2 Click on the **9617 Toolbar** menu item. The 9617 toolbar either appears or disappears. Choose this menu item again to toggle between these settings.

For more information, refer to **Toolbar button descriptions** on page 63.

Toolbar button descriptions

The toolbar buttons provide quick access to commonly
used features. To access or activate a feature, simply click
on the appropriate toolbar button. The toolbar buttons
are described below.

Toolbar Buttons (page 1 of 4)

Button	Feature	Description
	Up One Level	Exits from the current folder and moves one level up in the Address Book.
	New Folder	Creates a new folder in the Address Book.
	New Contact	Creates a new contact in the Address Book, and opens the New Contact **Address Properties** dialog box.
	Cut	Copies the selected folder or contact into the Clipboard and then deletes it.
	Copy	Copies the selected folder or contact into the Clipboard.

Toolbar Buttons (page 2 of 4)

Button	Feature	Description
	Paste	Pastes the folder or contact you copied to the clipboard into the selected folder. (The clipboard still retains a copy even after you have used this command, so you can paste a copied item more than once.)
	Properties (This button is black.)	Displays the **Address Properties** dialog box for the selected contact or the **Properties** dialog box for the selected folder.
	Large Icons	Displays the folders and contacts in the Address Book as large icons.
	Small Icons	Displays the folders and contacts in the Address Book as small icons.
	List	Displays the folders and contacts in the Address Book as small icons organized in vertical columns.
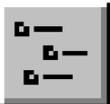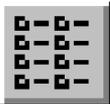
Toolbar Buttons (page 3 of 4)

Button	Feature	Description
	Report	Displays the folders and contacts in the Address Book in a report view format. In this format the icon, first name, last name, telephone numbers, and email information for the contact are shown.
	Find Person	Displays the **Find** dialog box. You can use this dialog box to find a contact within the Address Book.
	Calls Log	Displays the **Calls Log** window. This window allows you to view the log of incoming and outgoing calls.
	Configure Telephony Device	Displays the **9617 Configuration Properties** dialog box which allows you to set the options for your telephone.
	Help	Displays the application Help screen which allows you to view help topics.
	Memory Key	Displays the **Memory Keys** dialog box which allows you to use the memory keys.

Toolbar Buttons (page 4 of 4)

Button	Feature	Description
	Directory Synchroni-zation	Synchronizes the **Quick Dials** folder with the telephone Directory so that they both contain the same contacts.
	9617 Property Page (This button is blue.)	Displays the **9617 Property** dialog box which allows you to set the ring configuration for the selected contact. This button is only available when a Quick Dials contact is selected.
	Quick Dial Manager	Opens the **Quick Dial Manager** window so you can set the ring configuration for your Quick Dials. See **page 331**.

The Address Book section

The Address Book is a list of all the contacts stored in Personal Call Manager. The Address Book consists of two parts:

- the Tree View, located on the left-hand side of the Address Book, shows the structure of your folders

- the List View, located on the right-hand side, shows the folders and the contacts stored in whichever folder is selected in the Tree View section

To see where each part is located, refer to **The parts of the main window** on page 60.

To display the Address Book:

1   Click on the **View** menu.

2   Click on the **Only Address Book** menu item to display only the Address Book.

   OR

   Click on the **Both Address Book and Calls** menu item to display both the Address Book and the Current Calls.

   A bullet symbol (•) appears beside the current selection.

For more information on using the Address Book, refer to **The Address Book in Personal Call Manager** on page 157.

The Current Calls section

The Current Calls section consists of two parts:

- the Calls box which shows your current calls
- the Conference box which shows the calls that have been joined together in a conference

To see where these are located, refer to **The parts of the main window** on page 60.

To display the Current Calls:

1   Click on the **View** menu.

2   Click on the **Only Calls** menu item to display only the Current Calls.

   OR

   Click on the **Both Address Book and Calls** menu item to display both the Address Book and the Current Calls.

   A bullet symbol (•) appears beside the current selection.

For more information, refer to the following topics:

- **Current Calls icons** on page 69
- **Current Calls toolbar** on page 71

Current Calls icons

Current Calls icons appear in the Calls and Conference boxes to show you the status of your calls.

Note: Different versions of these icons are used in the **Calls** menu and task tray menu. For more information, refer to **The task tray menu** on page 56.

Current Calls icons (page 1 of 2)

Icon	Call Status	Description
	Ringing	Appears in the Calls box beside the calls that are currently ringing.
	Active Call	Appears in the Calls box beside the call you are currently on.
	Held Call	Appears in the Calls box beside calls that are on hold.
	Conference Call	Appears in the Conference box beside calls that are part of a conference.
	Held Confer-ence Call	Appears in the Conference box beside conference calls that are on hold.

Current Calls icons (page 2 of 2)

Icon	Call Status	Description
	Extension In Use	Appears in the Calls box for calls made on other telephones using your line. See **page 73**.

Current Calls toolbar

You manage the calls in the Calls box and the Conference box using the toolbars above them. The toolbar buttons are briefly described below.

Current Calls Toolbar (page 1 of 2)

Button	Feature	Description
	Manual dial	Displays the **Dial** dialog box so that you can enter a phone number using the keyboard. This feature is useful for calling a number that is not in the Address Book.
	Release Call	Hangs up the selected call.
	Properties	Displays the **Address Properties** dialog box for the selected caller and lets you add new callers to the Address Book.
	Large Icons	Displays current calls as large icons.
	Small Icons	Displays current calls as small icons.
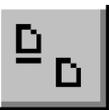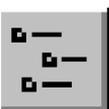
Current Calls Toolbar (page 2 of 2)

Button	Feature	Description
	List	Displays current calls as small icons in vertical columns.
	Report	Displays current calls in a report view format. In this format the icon, the callers name, the telephone number and the call timer are shown. The call timer is a running count of how long the call has been connected.

Extension in Use notification in Personal Call Manager

When someone is using one of your telephone lines on another telephone in your home or business, the Extension in Use icon (shown on the right) appears in the Calls box.

To join the call:

■ right-click the call icon and click on the **Unhold** menu item, or

■ press [*Line x*] for the line the call is on.

For more information, refer to **Extension in Use notification on the telephone** on page 41.

Status bar

When visible, the Status bar appears at the bottom of the screen and provides three information message areas.

| For Help, press F1 | Tapi Line: M9617/Line 1 | | |

Help messages   Line used   DND
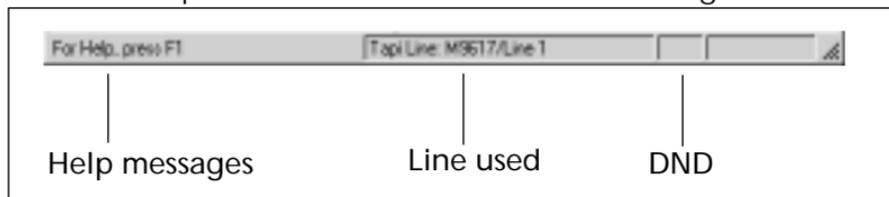
Help messages – Shows a help message, if available, for the area the mouse pointer is over. For example, if the mouse is over one of the buttons on the toolbar, the Status bar describes what that button does.

Line used – Identifies which TAPI line and which telephone line is being used by Personal Call Manager. (See page 433 for a definition of "TAPI".) Also displays the progress of synchronization between the software and the telephone.

- **Default** or **Line 1** indicates that Line 1 will be used when you make calls from Personal Call Manager.

- **Line 2** indicates that Line 2 will be used when you make calls from Personal Call Manager.

DND – When the Don't Disturb feature is enabled, "DND" appears in this area.

To show or hide the Status bar:

1 Click on the **View** menu.

2 Click on the **Status Bar** menu item. The Status bar appears or disappears depending on its previous setting. When the Status bar is visible, a checkmark (✔) appears beside the **Status Bar** menu item.

The About Personal Call Manager window

The **About Personal Call Manager** window shows the version of the Personal Call Manager software you are using. You will be asked to provide this information if you contact us for technical support.

To access the About Personal Call Manager window:

1 Click on the **Help** menu.

2 Click on the **About PCM** menu item.

How the telephone and Personal Call Manager work together

There are four areas of functionality that are synchronized (or shared) between the 9617 telephone and Personal Call Manager:

1. The Options List and the Memory keys on the telephone and the 9617 Configuration Properties dialog box in Personal Call Manager

The Options List in the 9617 telephone allows you to set the same options as the **9617 Configuration Properties** dialog box in Personal Call Manager. The changes you make in one place are automatically made in the other.

For example, you can program the telephone's memory keys using the telephone itself or using Personal Call Manager. The changes you make in one are automatically made in the other. (For more on memory keys, see **Memory keys and the M9617 telephone** on page 146.)

If you change settings in the Options List when Personal Call Manager is not running, these changes are updated automatically when you start Personal Call Manager.

Some exceptions: The Pager Notification, Call Blocking and Ring Configuration options can only be set using Personal Call Manager.

2. The Directory on the telephone and Quick Dials in Personal Call Manager

The telephone Directory and the Personal Call Manager **Quick Dials** folder synchronize. This means that Personal Call Manager and the 9617 telephone work together to keep the list of contacts stored in the telephone Directory the same as the list stored in the **Quick Dials** folder.

Normally, the 9617 telephone Directory and the **Quick Dials** folder in Personal Call Manager are identical. Differences can arise when:

■ contacts are added to the Personal Call Manager **Quick Dials** folder while the 9617 telephone is unplugged or not connected to the computer; or

■ contacts are added to the 9617 telephone Directory when Personal Call Manager is not running.

When there are differences between the two lists, you must choose between them which one you want to keep. You cannot automatically combine the two lists. The Startup Synchronization setting you choose determines which list – the telephone Directory or the **Quick Dials** folder – is kept. If you want to manually combine the two lists, you can choose not to synchronize them. For more information, refer to **Changing the Startup synchronization setting** on page 134.

3. The Callers List and Redial List

When Personal Call Manager starts, it compares the call lists in the 9617 telephone and in the program. If there are differences (if you have made or received a call when Personal Call Manager wasn't running), Personal Call Manager updates its Callers List, Redial List and Calls Log Window.

4. Call Control (making, answering and holding calls)

You can do common call control operations such as hanging up a telephone call using either the 9617 telephone or Personal Call Manager. For example, to end a call, you can press [Rls] on the telephone or click on the **Release** menu item in Personal Call Manager.

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Setup and customization

You can customize the way the 9617 telephone and Personal Call Manager manage calls. You can also add passwords, dialing restrictions, personal security numbers and more.

For more information, refer to the following topics:

Setting up the 9617 telephone

There are two ways to customize the features of the 9617 telephone. You can use the Options List in the telephone, or you can use the computer.

You will find all the options in the telephone's Options List in the **9617 Configuration Properties** dialog box in Personal Call Manager.

It doesn't matter which method you choose. The changes you make in the telephone Options List are also made in the **9617 Configuration Properties** dialog box, and vice versa.

Some exceptions: The Pager Notification, Call Blocking and Ring Configuration options can only be set using Personal Call Manager.

For more information, refer to the following topics:

- **Using the Options List to customize the M9617 telephone** on page 81

- **Using the computer to customize the M9617 telephone** on page 89

Using the Options List to customize the 9617 telephone

You can customize the 9617 telephone using the settings in the Options List. To view this list, press the Options key on the telephone. You may have to move the slider beside the telephone's indicator light to the right to reveal the Options key. (To see where this key is located, refer to **The M9617 telephone keys and lights** on page 29.)

If an Options password has been set up, the telephone display prompts you to enter it (see **Setting the Options password using the telephone** on page 87).

Once you have entered the password and accessed the list, the following appears on the 9617 telephone display:

```
Options List=26
Use ↕ to view
```

The number 26 refers to the number of features (or settings) you can customize. Use $\boxed{↓}$ $\boxed{↑}$ on the telephone to scroll through the list of options.

For more information, refer to **The telephone Options List**.

The telephone Options List

The 9617 telephone Options List (page 1 of 5)

Use this option...	to do this...
01. Language choice	Choose the language you want to see on the telephone display. You can choose English, French or Spanish. See **page 20**.
02. Time/Date	Set the date and time on your telephone display. See **page 21**.
03. Line x is prime	Choose which of your two lines is the prime line. See **page 240**.
04. Pick ring tone	Select one of four ring tones for Line 1 or Line 2. You can pick a different ring tone for each line. See **page 51**.
05. Live dialpad OFF (ON)	Turn the live dialpad option on or off. When this option is on, numbers are dialed out as you enter them. When this option is off, the numbers you enter are not dialed out until you lift the handset or press *Dial*, Handsfree Mute or a line key. See **page 239**.

The 9617 telephone Options List (page 2 of 5)

Use this option...	to do this...
`06. Clear Msg. Wtg.`	Clear the `Message Waiting` display prompt when you have finished listening to your Voice Mail messages. See **page 47**.
`07. Change CALLERS`	Specify for each line whether the Callers List logs all calls, no calls or only unanswered calls. See **page 336**.
`08. Call wait ID`	Turn the display of Call Waiting ID on or off. If you turn Call Wait ID off, you will only hear the Call Waiting tone when you receive a Call Waiting call. You must subscribe to Call Waiting from your telephone company. See **page 268**.
`09. Set list mode`	Specify that the Callers List for both lines be combined or separate. See **page 338**.
`10. Fax switch OFF (ON)`	Turn the Fax switch on or off. See **page 387**.
`11. Change Answer`	Specify which line is answered when both are ringing and you lift the handset or press [Handsfree Mute]. See **page 270**.

The 9617 telephone Options List (page 3 of 5)

Use this option...	to do this...
12. Headset disabled (enabled)	Use a headset instead of the handset to speak on the telephone. See **page 238**.
13. Check line cord	Specify for each line whether or not your telephone checks to ensure the line cord is connected. The telephone displays a message when a line cord is not connected. See **page 48**.
14. Area codes	Enter area codes that you don't want to appear in the Callers List or on the telephone display. See **page 375**.
15. Restrictions	Prevent certain numbers from being dialled out. See **page 378**.
16. Overrides	Specify up to three numbers to override the dialing restrictions you have entered into the Restrictions option. See **page 381**.
17. Security numbers	Prevent certain numbers such as passwords or Calling Card Numbers from being displayed on your telephone when you dial them. See **page 383**.

The 9617 telephone Options List (page 4 of 5)

Use this option...	to do this...
18. Call timer ON (OFF)	Enable the automatic display of the call timer, which shows how long you have been on a call. See **page 365**.
19. Don't dsturb OFF (ON)	Stop or prevent the ringing of your telephone. See **page 323**.
20. Timer key	Program the Call timer option into a memory key. When you press the Timer key, the Call timer appears on the telephone display. See **page 366**.
21. Don't dsturb key	Program the Don't disturb option into a memory key. When you press the memory key, the option turns off or on, depending on what it was set to when you pressed it. See **page 325**.
22. Busy redial key	Program the Busy redial option into a memory key. When you press the memory key, the option is activated or deactivated. See **page 371**.
23. Busy retry delay	Specify the time between automatic busy redial attempts. See **page 372**.

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The 9617 telephone Options List (page 5 of 5)

Use this option...	to do this...
24. Busy attempts	Specify the number of automatic Busy redial attempts. See **page 373**.
25. Options password	Enter a password to restrict access to the Options List. See **page 87**.
26. Versions	View the version of firmware (resident software) your telephone uses. You may be asked to provide this information if you contact the Aastra customer support line.

Setting the Options password using the telephone

You can enter a password to prevent others from viewing or changing your Options List.

To enter or change an Options List password:

1 Press the Options key.

2 Enter the old Options password if one has been set.

3 Use ↓ ↑ to scroll to option number 25 or press 2 5 .

4 Press ✱ .

5 Enter your password (6 digits maximum).

6 Press *Save* .

7 Press *Rls* .

For more information, refer to the following topics:

- ■ **Using the backdoor feature to access the Options list** on page 88

- ■ **Setting the Options Password using Personal Call Manager** on page 108

Using the backdoor feature to access the Options list

If you have forgotten your Options password, you can still access the Options list by using the backdoor password. The backdoor password is simply the month, day and hour **(based on a 24-hour clock)** displayed on your telephone display.

For example, if the display shows MAY 09 10:30ᴬᴹ, the backdoor password is 050910 (05 for the month, 09 for the day, and 10 for the hour).

If the display shows Feb 25 3:55ᴾᴹ the backdoor password is 022515 (02 for the month, 25 for the day and 15 for the hour).

Once you are in the Options List, you can view or change your Options password.

Note: The backdoor feature does not work for accessing the **9617 Configuration Properties** dialog in Personal Call Manager.

For more information, refer to **Setting the Options password using the telephone** on page 87.

Using the computer to customize the 9617 telephone

The **9617 Configuration Properties** dialog box allows you to customize the features of the 9617 telephone using your computer.

You can access this dialog box several ways. For more information, refer to the following topics:

- **Customizing the telephone using the menu bar or toolbar** on page 90

Customizing the telephone using the menu bar or toolbar

To customize your telephone features:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item.
The **Choose a TAPI Line** dialog box appears.

Choose a TAPI Line   ☒

┌─ Connect Using: ─────────────────────────┐
│ TAPI Line: M9617   ▼ │
│   Configure Line...   │
│   │
│ Address: Line 1   ▼ │
└───┘

          OK   Cancel

---
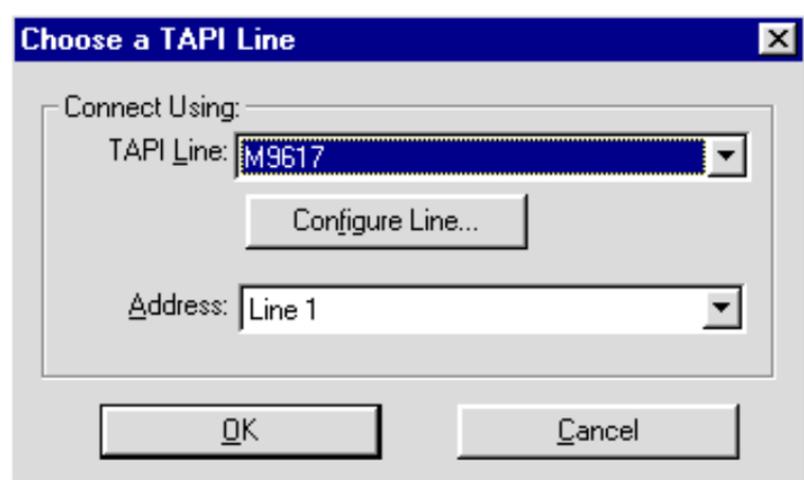
3 Click on the **Configure Line** button.

4 If required, type the Options List password.

5 Click on the **OK** button. The **9617 Configuration Properties** dialog box appears.

   Tip: Instead of doing steps 1 to 5, click on the Configure Telephony button (shown on the right) on the toolbar.

   Note: You may also be able to access this dialog box from other TAPI applications.

continued...

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6 Move to the tab that has the feature or setting you want to change. For more information on the features of each tab, refer to **The M9617 Configuration Properties dialog box** on page 92.

The settings you specify on the **Configuration Properties** dialog box are made in the Options List of the telephone automatically.

7 Customize the settings as desired.

8 Click the **Apply** button to apply your settings.

9 If desired, move to another tab and repeat steps 7 and 8.

10 When you are finished, click on the **OK** button.

The 9617 Configuration Properties dialog box

To see how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

The **9617 Configuration Properties** dialog box consists of six tabs. Each tab groups together related features. These tabs include all of the features in the telephone's Options List. The settings you specify in this dialog box are stored in the telephone's Options List automatically.

Note: There are a few exceptions. The Pager Notification, Call Blocking and Ring Configuration options can only be set using Personal Call Manager, although these settings are still stored in the telephone itself.

For more information, refer to the following topics:

- **The Line tab** on page 93
- **The General tab** on page 95
- **The Phone Display tab** on page 99
- **The Feature tab** on page 101
- **The Security tab** on page 106
- **The Memory Keys Assignment tab** on page 110

The Line tab

This tab on the **9617 Configuration Properties** dialog box allows you to specify line features for both Line 1 and Line 2 independent of each other.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

Options For – Select the telephone line (Line 1 or Line 2) you want to set options for. The settings (listed in detail below) that you make on this tab only affect the line that is selected when you make them.

Enable Line Cord Check – With this option enabled, the 9617 telephone checks to ensure that your telephone lines are connected properly. If a line cord is not connected properly, is malfunctioning, or is not present, the 9617 telephone displays the "Check line cord" message.

Enable Pager Notification – This option enables the Pager Notification feature. When this feature is enabled, the telephone numbers of the incoming calls you specify are forwarded to the pager number you have specified on the **Feature** tab. Refer to **Sending your calls to your pager** on page 306.

Note: The Pager Notification option is not visible in the 9617 telephone Options List. However, it still works when Personal Call Manager is not running or the computer is off.

The Line tab (continued)

Ring Volume – This slider determines the ring volume of the phone.

Ring Tone – Select from one of four ring tones for the phone. Setting different tones for each line can help you identify which line incoming calls are on.

Call Waiting ID – This option enables the display of Call Waiting ID. If you subscribe to Call Waiting ID from your local telephone company, turn this option on to have Call Waiting ID appear on the 9617 telephone and in the **You have a new call** dialog box in Personal Call Manager. If you do not subscribe to this service, turn this option off. (The name of this service may vary from area to area.)

Callers Display – This option determines which calls are logged in the Callers List. You can select All Calls, No Calls, or Unanswered Calls. If you are going to use the Pager feature, you must set up the Callers List in a particular way. For more information, refer to **About the Callers List and the Pager feature** on page 337 and **Sending your calls to your pager** on page 306.

The General tab

This tab on the **9617 Configuration Properties** dialog box allows you to specify general telephone features.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

Enable Headset – Select this option if you are going to attach a headset to the 9617 telephone.

Enable Fax Switch – Enabling this option is one of the steps you must complete to allow the 9617 telephone to route fax or modem calls to the fax machine or modem connected to Jack 2. For more information on setting up this feature, refer to **Connecting a fax machine or modem to the telephone** on page 387.

Enable Live Dialpad – With Live Dialpad enabled, the 9617 telephone begins dialing as soon as you enter a number on the keypad. If this option is not selected, the telephone does not dial the telephone number you have entered until you lift the handset or press `Dial`, `Handsfree Mute`, or `Line x`.

Enable Call Timer – When this option is selected, a timer appears on the 9617 telephone display for incoming and outgoing calls. If this option is not selected, the timer does not appear; however, call times still appear in the **Calls Log Window** in Personal Call Manager and in the Report view of the **Calls** and **Conference** boxes.

The General tab (continued)

Set List Mode to be – This option determines how callers are tracked; callers can be split by line, or combined into a single list.

Note: List Mode affects only the Callers List on the 9617 telephone, not on Personal Call Manager. The Personal Call Manager Callers List is always combined.

Set Prime Line to be – This option sets the default line for the 9617 telephone. The prime line is the line that is activated when you pick up the handset.

Set Language to be – The language for the 9617 telephone display can be set to English, French, or Spanish with this option.

Note: The Set Language to be option affects only the 9617 telephone. You cannot change the language of Personal Call Manager.

Answer Preference – If both lines are ringing at the same time, this option determines which line is answered first when you pick up the handset or press ⌈ Handsfree Mute ⌉ on the telephone.

"Answer Longest" answers the line that has been ringing the longest. "Answer Prime" answers the line that has been designated the prime line (see the **Set Prime Line to be** option above).

The General tab (continued)

Note: The following four features are not visible on the M9716 telephone Options List. However, they still work when Personal Call Manager is not running or the computer is off.

Suppress First Ring – Many of the 9617 telephone's features require Caller Identification (Caller ID) information to work. (For example, see **Block Private Call** and **Block Unknown Call**, below.) However, Caller ID information isn't received by the 9617 telephone until after the first ring.

When you enable the **Suppress First Ring** option, the 9617 telephone does not ring until after it has received the Caller ID information. (While the telephone won't ring, the line indicator light will flash and the call information will be displayed for a few moments before the phone rings). This allows you to more effectively screen your calls. (See **Screening your telephone calls** on page 312.)

Block Private Call – Enabling this option prevents the 9617 telephone from ringing for all calls that have a Caller ID of "private." Callers can request that their ID be listed as "private" by the telephone company. Blocked calls ring once, unless Suppress First Ring is enabled.

Block Unknown Call – Enabling this option prevents the 9617 telephone from ringing for all calls that have a Caller ID of "unknown." A caller is listed as "unknown" if the telephone company has no information for that caller. Blocked calls ring once, unless Suppress First Ring is enabled.

The General tab (continued)

Special Ring for Long Distance – With this option enabled, the 9617 telephone sounds a special ring whenever you receive a long distance call. (Long distance calls ring once normally before the special ring is activated unless the **Suppress First Ring** option is enabled.)

The Phone Display tab

This tab on the **9617 Configuration Properties** dialog box allows you to set display options for the telephone.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

Display Contrast – Drag the slider to increase or decrease the contrast of the phone's display. Click on the **Apply** button to see the results of a new setting without exiting the **9617 Configuration Properties** dialog box.

Area Codes – In some areas, the telephone company sends the area code of all local calls with the Caller ID information. However, you may not be able to dial local numbers using the Callers List in the telephone until you remove the area code from the number. If this is the case in your area, you can use the area code stripping feature.

When you enter an area code or prefix using this feature, your 9617 telephone removes that code or prefix from numbers stored in the telephone's Callers List.

For example, if you enter your area code into this option, all calls in your area code will appear in the Callers List with the area code stripped off (the area code appears in brackets after the number like this: 555-1234 (403)).

You can enter three separate area codes or prefixes, each up to seven digits long.

Note: It is highly recommended that you enter your local area code in one of these three fields **and** in the **Area Code** field on the **Dialing Properties** dialog box. To access this dialog box, click on the **Tools** menu in Personal Call Manager and select the **Dialing Properties** menu item. For more information on Dialing Properties, refer to **Specifying dialing properties for the location you are dialing from** on page 125.

For more information on the Area Code feature and the telephone, refer to **Stripping area codes from numbers in the telephone Callers List** on page 375.

The Feature tab

This tab on the **9617 Configuration Properties** dialog box allows you to specify Automatic Busy Redial, Do Not Disturb and Pager Notification options.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

For more information, refer to the following topics:

- **Do Not Disturb Options** on page 102
- **Automatic Busy Redial Options** on page 103
- **Pager Notification Options** on page 104

Do Not Disturb Options

When the Do Not Disturb (DND) option is enabled, the telephone does not ring when someone calls.

However, the line indicator (the light beside the line key on the telephone) still flashes. In Personal Call Manager, the **You Have a New Call** dialog box still appears and the Ringing icon for the call appears in the Calls box.

Although the telephone does not ring, you can still answer the call.

Enable DND – Select this option on the **Feature tab** to enable Do Not Disturb for the telephone.

When this option is enabled:

- the message "Don't disturb ON" appears on the display of the telephone
- the Don't Disturb icon (shown on the right) appears in the task tray on your computer
- "DND" appears on the Status Bar of Personal Call Manager

Remember to turn this option off when you want the telephone to ring normally when you receive a call.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

For information about this feature, refer to **The Don't Disturb feature** on page 322.

Automatic Busy Redial Options

When you make a call and get a busy signal, you can use the Busy Redial feature to continue calling that number automatically until your call gets through.

You can set two of the Automatic Busy Redial Options using this tab. The options are briefly described below. For more information on how to set up this feature, refer to **Redialing busy telephone numbers automatically** on page 370.

Number of Tries – This option on the **Feature** tab sets how many times the 9617 telephone will redial a busy number automatically, if Autobusy Redial has been enabled. The maximum number of tries is 15.

Delay in Seconds between Tries – This option on the **Feature** tab sets the delay between tries, in seconds, for the Auto Busy Redial. The maximum delay you can specify is 99 seconds.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

Pager Notification Options

If you have selected the **Enable Pager Notification** option on the **Line** tab of this dialog box, you should enter settings for the following options on the **Feature** tab. For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89. Also refer to **Sending your calls to your pager** on page 306.

Pager Number – Enter the pager number that Caller ID information should be forwarded to.

Pager Delay in Seconds – The pager delay is the time between when the 9617 telephone dials your pager number, and when your pager service can accept the incoming caller's number. Enter the length of this delay in this box.

For example, when the 9617 telephone dials your pager number, there may be three telephone rings followed by a message from your pager service. In this case, you would add a few seconds to the time it takes for the three rings and the message to play. If it takes 15 seconds for the three rings and the message, your pager delay would be 17 seconds.

Pager On Time – Enter the time that the pager is turned on. Before this time, Caller ID information will not be forwarded to the pager.

Pager Off Time – Enter a time that the pager is turned off. After this time, Caller ID information will not be forwarded to the pager.

Note: If you want the pager feature to be on all the time, set both the Pager On Time and Pager Off Time to 12:00 PM.

The Security tab

This tab configures the security options for the 9617 telephone.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

Security Number Settings – The 9617 is equipped with a Security Numbers feature to keep selected numbers private when you dial. When you have entered a security number using this option, your telephone does not display or store the digits that you dial after that security number. Instead, the numbers that follow the security number are replaced with the * symbol on the display. You can secure up to three numbers, each up to 12 digits long. This feature is useful, especially for keeping numbers like your Voice Mail password private.

Restricted Number Settings – Dialing Restrictions are used to prevent certain numbers from being dialed out. You can enter up to three dialing restrictions, each up to 7 digits long. If you attempt to dial a number that matches the restricted digits, the message `Restricted number` appears on the telephone display.

For example, if you entered the codes 0, 1, and 411, any number beginning with 0, 1 or 411 could not be dialed from the telephone. However, the number 555-0411 could be dialed because it does not begin with any of the restricted numbers.

The Security tab (continued)

Important: Care must be taken when you are restricting numbers that start with 9. If you enter 9, 91, or 911 as one of the dialing restrictions, you will not be able to dial the emergency services number 911. To make sure this doesn't happen, you can enter 911 as a dialing restriction override. For more information, refer to "Override Settings" below.

Override Settings – Dialing Restrictions are used to prevent certain numbers from being dialed out. You can, however, program three Override numbers to override the restricted numbers feature.

For example, if you entered the 0, 1, and 411 as restricted numbers, any number beginning with 0, 1 or 411 could not be dialed from the telephone. However, if you entered 1800 as an override number, you could dial the number 1-800-555-5555 even though it begins with 1.

You can program up to three overrides, each up to twelve digits long. For more information, refer to **Overriding dialing restrictions** on page 381

Option List Password – You can enter a numeric password that will be needed to open the **TAPI Line Configuration** dialog box and to access the Options List on the 9617 telephone. The current password appears in the **Existing Password** field. If there is no current password, this field is blank. For more information, refer to **Setting the Options Password using Personal Call Manager** on page 108.

Setting the Options Password using Personal Call Manager

To change the existing Options List password:

1 Click on the Configure Telephony button on the toolbar (shown on the right). The **9617 Configuration Properties** dialog box appears.

2 Select the **Security** tab.

3 If no password exists, click on the **Disable Password** box until the checkmark does not appear inside it. If a password exists, skip to step 4.

4 Enter a new numeric password in the **Enter New Password** field.

   Note: The password must be numeric. Do not enter letters.

5 Enter the new password again in the **Confirm New Password** field.

6 Click on the **Apply** button. A dialog box appears confirming that the password has been changed. (Click the **OK** button to close the dialog box.)

To remove a password:

1 On the **Security** tab, click on the **Disable Password** box until a checkmark appears inside it.

2 Click on **OK** or **Apply**. The password is deleted. (If you close and then reopen the dialog box, the password will no longer appear.)

For more information, refer to the following topics:

- **Setting the Options password using the telephone** on page 87

- **Using the backdoor feature to access the Options list** on page 88

The Memory Keys Assignment tab

This tab on the **9617 Configuration Properties** dialog box allows you to assign phone numbers and features to memory keys.

For information on how to access this dialog box, refer to **Using the computer to customize the M9617 telephone** on page 89.

You can also use the telephone to assign phone numbers and features (except for the Application feature) to memory keys. If numbers or features have already been entered using the phone, they will appear here.

The list of features you can program into a memory key is given below.

Memory Key Feature List (page 1 of 2)

Feature	Description
Empty	Clears the memory key (leaving it empty).
Do Not Disturb	Assigns the Do Not Disturb (DND) option to the memory key. Pressing this key turns DND on or off. When DND is on, the 9617 telephone does not ring when you receive a call (unless the call is from a contact that has been set to the **Always Ring** option.)
Auto Busy Redial	Assigns the Auto Busy Redial feature to the memory key.

Memory Key Feature List (page 2 of 2)

Timer	Assigns the Call Timer to the memory key.
Application	Assigns an application to the memory key. When you press the memory key the application stored in the memory key launches. Launch Pad must be running. For more information, refer to **The Launch Pad application** on page 394
Phone Number	Assigns a contact's telephone number to a memory key. Whey you press this key, the number is dialed.
Feature Light On	Assigns a feature code provided by the telephone company to a memory key. When you press this key, the 9617 telephone dials the code and turns the feature light on.
Feature Light Off	This feature turns off a feature code provided by the telephone company, and turns the 9617 telephone feature light off.

For more information, refer to the following topics:

- **Clearing a memory key** on page 113
- **Assigning the Do Not Disturb feature to a memory key** on page 114

- **Assigning the Auto Busy Redial feature to a memory key** on page 115
- **Assigning the Call Timer feature to a memory key** on page 116
- **Assigning an application to a memory key** on page 117
- **Assigning a phone number to a memory key using Personal Call Manager** on page 119
- **Programming a memory key as a FeatureLight On or Off key using Personal Call Manager** on page 121
- **Labeling memory keys** on page 150

Clearing a memory key

To clear or delete a memory key:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure Line** button. (If required, type the Options List password and click on the **OK** button.) The **9617 Configuration Properties** dialog box appears.

Tip: You can also display this dialog box by clicking on the Configure Telephony button (shown on the right) on the toolbar.

4 Click on the **Memory Keys Assignment** tab.

5 Click on the radio button that corresponds to the key you want to clear.

6 Select **Empty** from the **Feature** droplist.

7 Click on the **Apply** button and then click on the **OK** button to close the dialog box.

For more information, refer to **Deleting memory keys** on page 152.

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Assigning the Do Not Disturb feature to a memory key

To assign Do Not Disturb to a memory key:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure Line** button. (If required, type the Options List password and click on the **OK** button.) The **9617 Configuration Properties** dialog box appears.

   Tip: You can also display this dialog box by clicking on the Configure Telephony button (shown on the right) on the toolbar.

4 Click on the **Memory Keys Assignment** tab.

5 Click on the radio button that corresponds to the key you want to program.

6 Select **Do Not Disturb** from the **Feature** droplist.

7 Click on the **Apply** button and then click on the **OK** button to close the dialog box.

For more information, refer to **The Don't Disturb feature** on page 322.

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Assigning the Auto Busy Redial feature to a memory key

To assign Auto Busy Redial to a memory key:

1   Click on the **Tools** menu.

2   Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3   Click on the **Configure Line** button. (If required, type the Options List password and click on the **OK** button.) The **9617 Configuration Properties** dialog box appears.

   Tip: You can also display this dialog box by clicking on the Configure Telephony button (shown on the right) on the toolbar.

4   Click on the **Memory Keys Assignment** tab.

5   Click on the radio button that corresponds to the key you want to program.

6   Select **Auto Busy Redial** from the **Feature** droplist.

7   Click on the **Apply** button and then click on the **OK** button to close the dialog box.

For more information, refer to **Redialing busy telephone numbers automatically** on page 370.

Assigning the Call Timer feature to a memory key

To assign the Call Timer to a memory key:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure Line** button. (If required, type the Options List password and click on the **OK** button.) The **9617 Configuration Properties** dialog box appears.

   Tip: You can also display this dialog box by clicking on the Configure Telephony button (shown on the right) on the toolbar.

4 Click on the **Memory Keys Assignment** tab.

5 Click on the radio button that corresponds to the key you want to program.

6 Select **Timer** from the **Feature** droplist.

7 Click on the **Apply** button and then click on the **OK** button to close the dialog box.

For more information, refer to **Timing the length of your calls** on page 364.

Assigning an application to a memory key

To assign an application to a memory key:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure Line** button. (If required, type the Options List password and click on the **OK** button.) The **9617 Configuration Properties** dialog box appears.

   Tip: You can also display this dialog box by clicking on the Configure Telephony button (shown on the right) on the toolbar.

4 Click on the **Memory Keys Assignment** tab.

5 Click on the radio button that corresponds to the key you want to program.

6 Select **Application** from the **Feature** droplist.

7 Click on the **Configure** button. The **Application Key** dialog box appears.

8 Enter the name of the memory key in the **Name** field.

9 Enter the path and name of the application.
OR
If you do not know the path and name, click on the **Browse** button. The **Select the Application to Execute** dialog box appears. Locate and select the program file (the .exe file) and then click on the **Open** button.

10 Select the **Run Launch Pad at startup** option if you want the Launch Pad application to launch at startup. Note that Launch Pad must be running for the application memory key to work. A check mark appears in the checkbox when this option is selected.

11 Click on the **OK** button.

12 Click on the **Apply** button and then click on the **OK** button to close the dialog box.

For more information, refer to **The Launch Pad application** on page 394.

Assigning a phone number to a memory key using Personal Call Manager

To assign a phone number to a memory key:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure Line** button. (If required, type the Options List password and click on the **OK** button.) The **9617 Configuration Properties** dialog box appears.

Tip: You can also display this dialog box by clicking on the Configure Telephony button (shown on the right) on the toolbar.

4 Click on the **Memory Keys Assignment** tab.

5 Click on the radio button that corresponds to the key you want to program.

6 Select **Phone Number** from the **Feature** droplist.

7 Click on the **Configure** button. The **Phone Number** dialog box appears.

8 Enter the name of the contact.

9 Enter the phone number of the contact. Be sure to enter any digits required for dialing.

10 Select the **Always Ring** option if you want the telephone to ring when this contact calls even if you have turned on the Do Not Disturb (DND) feature.

11 Select the **Never Ring** option if you don't want the telephone to ring when this contact calls.

12 Select the **Special Ring** option if you want to hear a special ring when this contact calls.

13 Select the **Pager Notification** option if you want the Caller ID for this contact to be sent to your pager even if you have disabled the Pager Notification option. For more information on the pager feature, refer to **Sending your calls to your pager** on page 306.

14 Click on the **OK** button.

15 Click on the **Apply** button and then click on the **OK** button to close the dialog box.

For more information, refer to **Memory keys and the M9617 telephone** on page 146.

Programming a memory key as a FeatureLight On or Off key using Personal Call Manager

Some custom calling features require a unique On code and a unique Off code. Other features use the same code for On and Off. (You may have to subscribe to your telephone company for Custom Calling Features. Contact your telephone company for the appropriate feature codes.)

Features that have unique On and Off codes must be stored in two feature keys. The On feature key stores the On feature code, and the Off feature key stores the Off code. Features that use the same code for both On and Off only need to be stored in one feature key.

To save a FeatureLight ON or OFF code:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure Line** button. (If required, type the Options List password and click on the **OK** button.) The **9617 Configuration Properties** dialog box appears.

   Tip: You can also display this dialog box by clicking on the Configure Telephony button (shown on the right) on the toolbar.

4 Click on the **Memory Keys Assignment** tab.

5 Click on the radio button that corresponds to the key you want to program.

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6 Select **FeatureLight On** or **FeatureLight Off** from the **Feature** droplist.

7 Click on the **Configure** button.

8 Enter the Feature On or Off code. (Contact your telephone company for the appropriate feature codes.)

9 Click the **OK** button.

10 Click on the **Apply** button and then click on the **OK** button to close the dialog box.

For more information, refer to **Saving a Feature On or Off Code using the telephone** on page 358.

Setting up Personal Call Manager

Before you can use Personal Call Manager, you must choose the TAPI line it will use and define the dialing properties for your location.

For more information, refer to the following topics:

- **Specifying the TAPI line used by Personal Call Manager** on page 124
- **Specifying dialing properties for the location you are dialing from** on page 125
- **Personal Call Manager preferences** on page 127

Specifying the TAPI line used by Personal Call Manager

A TAPI line is not a physical telephone line; it is a piece of software your computer uses to interface with the telephone. The TAPI line designed for Personal Call Manager is called "9617." You must select this TAPI line if you want the telephone to work with Personal Call Manager.

Other TAPI lines available on your computer may not work with the 9617 telephone.

To specify the TAPI line used by Personal Call Manager:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item.
The **Choose a TAPI Line** dialog box appears.

3 Click on the drop list arrow beside **Address**.

4 Choose the telephone line you want Personal Call Manager to use as a prime line. You can choose **Line 1**, **Line 2** or **Default**. If you choose **Default or Line 1**, Personal Call Manager will use Line 1. If you choose **Line 2**, Personal Call Manager will use Line 2.

5 Click on the drop list arrow next to the **TAPI Line** field.

6 Click on the **9617** item.

   Note: You can set your telephone options by configuring this TAPI line. For more information, refer to **Using the computer to customize the M9617 telephone** on page 89.)

7 Click on the **OK** button.

Specifying dialing properties for the location you are dialing from

Microsoft® Windows® provides a **Dialing Properties** dialog box that Personal Call Manager uses to let you specify dialing requirements unique to your location. For example, you may specify your geographic location, area code, or the calling card you want to use.

You use this dialog box to create a new dialing location, select a dialing location and delete a dialing location.

Note: Personal Call Manager uses the same dialing properties for both lines.

To change the dialing properties for a location:

1   Click on the **Tools** menu.

2   Click on the **Dialing Properties** menu item.
The **Dialing Properties** dialog box appears.

3   Make changes as required. You can view context-sensitive help for items on this dialog box by pressing **F1**. For more information, refer to **The Dialing Properties dialog box** on page 126.

If you don't want to use the dialing properties

You can choose not to use the dialing properties specified on this dialog box. For more information, refer to **The Dialing Rule Setting** on page 132.

The Dialing Properties dialog box

The **Dialing Properties** dialog box is a Microsoft® Windows® feature which allows you to specify dialing information for your current location.

The dialing properties you can specify for a location include:

- the country you are in
- your area code
- dialing rules determining which telephone numbers are local and which are long distance
- numbers needed for accessing outside lines
- calling card specifications
- the code that must be dialled before a phone number to disable Call Waiting for that call
- whether you have pulse or tone dialing service

You can press **F1** to view context-sensitive help for items on this dialog.

If you have any questions about this dialog box, refer to Microsoft® Windows® documentation. You can also contact the Microsoft Support Network.

Personal Call Manager preferences

The Personal Call Manager **Preferences** dialog box allows you to specify how the search feature works, whether the main window is open or minimized on startup, whether dialing rule settings are used and the startup synchronization setting for the telephone Directory and the **Quick Dials** folder.

For more information, refer to the following topics:

- **Search preferences** on page 128
- **The Startup Option** on page 130
- **The Dialing Rule Setting** on page 132
- **Changing the Startup synchronization setting** on page 134

Search preferences

The Search feature operates in one of two different modes: Slow Search and Fast Search.

In Slow Search mode, you enter the characters you want to find and then click on the **Find Now** button. Personal Call Manager then searches through the Address Book to find the characters you entered.

In Fast Search mode, Personal Call Manager starts searching through the contacts as soon as you enter characters.

For more information, refer to **Changing the Search mode** on page 129.

Changing the Search mode

To change the Search mode:

1 Click on the **Tools** menu.

OR

Right-click on the Personal Call Manager icon in the task tray. (See **The task tray icon** on page 55.)

2 Click on the **Preferences** menu item. The **Preferences** dialog box appears.
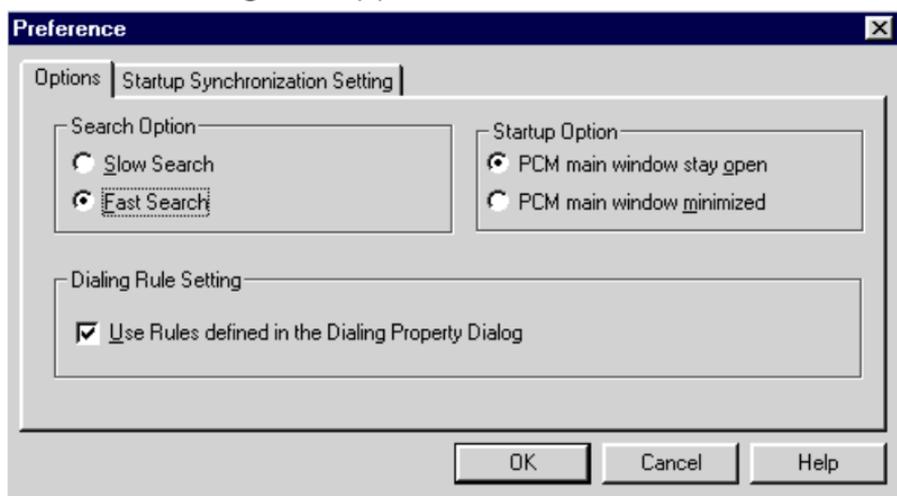
3 On the **Options** tab, click on the search option you want to use.

4 Click on the **OK** button.

For more information, refer to **Search preferences** on page 128.

The Startup Option

The Startup Option determines whether the main window is open or minimized when you start Personal Call Manager.

In either case, you can still manage calls using Personal Call Manager.

When the main window is open, you can use all the features of Personal Call Manager.

When the main window is minimized, you manage calls using the task tray menu.

To view the tasktray menu when the main window is minimized, click on the Personal Call Manager icon in the task tray (see **The task tray icon** on page 55**)**.

For more information, refer to **Changing the Startup Option** on page 131.

Changing the Startup Option

To change the Startup Option:

1 Click on the **Tools** menu.

OR

Right-click on the Personal Call Manager icon in the task tray. (See **The task tray icon** on page 55.)

2 Click on the **Preferences** menu item. The **Preferences** dialog box appears.

Preference	✕
Options | Startup Synchronization Setting	

Search Option
- ○ Slow Search
- ● Fast Search

Startup Option
- ● PCM main window stay open
- ○ PCM main window minimized

Dialing Rule Setting
- ☑ Use Rules defined in the Dialing Property Dialog

OK   Cancel   Help
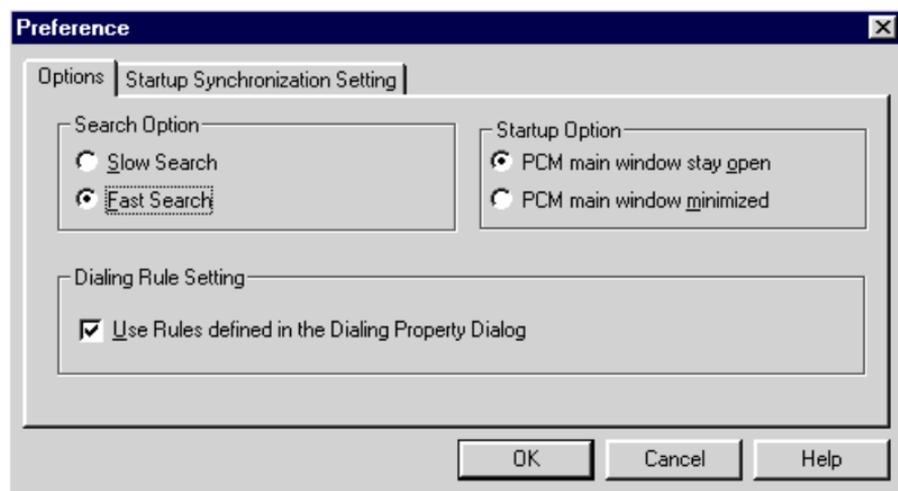
3 Click on the **Options** tab if it is not already selected.

4 Click on the Startup Option you want to use.

The Dialing Rule Setting

The Dialing Rule Setting determines whether Personal Call Manager uses the dialing properties entered in the **Dialing Properties** dialog box. This feature is enabled by default.

When the Dialing Rule Setting is on, Personal Call Manager uses dialing properties, such as the local area code and the outside line access code, when making a call.

When the Dialing Rule Setting is disabled, Personal Call Manager does not use the dialing properties and you must manually enter any additional dialing information, such as the outside line access code.

For more information, refer to the following topics:

- **The Dialing Properties dialog box** on page 126
- **Changing the Dialing Rule Setting** on page 133.

Changing the Dialing Rule Setting

To change the Dialing Rule Setting:

1 Click on the **Tools** menu.

OR

Right-click on the Personal Call Manager task tray icon. (See **The task tray icon** on page 55.)

2 Click on the **Preferences** menu item. The **Preferences** dialog box appears.

3 Click on the **Options** tab if it is not already selected.

4 Click on the **Use Rules defined in the Dialing Properties Dialog** checkbox to select or deselect it. A checkmark appears in the checkbox when it is selected.

For more information, refer to **The Dialing Rule Setting** on page 132.

Changing the Startup synchronization setting

The Startup Synchronization Setting determines how the 9617 telephone Directory and the Personal Call Manager **Quick Dials** folder are synchronized when the program is started.

When the telephone is plugged into the computer and Personal Call Manager is running, the 9617 telephone Directory and the **Quick Dials** folder in Personal Call Manager synchronize.

The two can become different if:

- contacts are added to the **Quick Dials** folder while the telephone is unplugged or not connected to the computer
- contacts are added to the telephone Directory when Personal Call Manager is not running

To change the Startup Synchronization Setting:

1   Click on the **Tools** menu.

2   Click on the **Preferences** menu item. The **Preferences** dialog box appears.

3   Click on the **Startup Synchronization Setting** tab.

4   Select the options you want. For a description of these settings, refer to **Startup Synchronization settings** on page 135.

For more information, refer to **How the telephone and Personal Call Manager work together** on page 76.

Startup Synchronization settings

Make Quick Dials Folder the Same as Phone Directory

Choose this option if you want to copy the entire list of contacts in the telephone Directory to the **Quick Dials** folder. **All Quick Dial contacts that are not stored in the telephone Directory will be deleted.**

Make Phone Directory the Same as Quick Dials Folder

Choose this option if you want to copy the entire list of contacts in the **Quick Dials** folder into the telephone Directory. **All contacts in the 9617 telephone Directory that do not appear in the Quick Dials folder will be deleted.**

Note: The 9617 telephone Directory only stores one telephone number – the default telephone number – for each contact.

Do Not Synchronize

If you select this option, Personal Call Manager will not synchronize the Directory and **Quick Dials** folder at startup.

However, any subsequent additions or deletions you make are still made in both the **Quick Dials** folder and the telephone Directory.

You can choose to fully synchronize the two at any time by clicking on the Synchronize button on the toolbar (shown on the right).

Show Warning Dialog on Startup

If this option is selected (it is selected by default), a warning dialog box appears before the Directory and the **Quick Dials** are synchronized. This dialog box gives you the option of changing the synchronization setting, or not synchronizing at all.

If this option is not selected, the warning dialog box does not appear before synchronization begins. Personal Call Manager synchronizes the Directory and **Quick Dials** folder as specified on the **Startup Synchronization Setting** tab of the **Preferences** dialog box.

A checkmark appears in the checkbox if this option is selected.

Note: The name of a contact in the Directory may differ from the name that appears in the **Quick Dials** folder. This occurs when a contact entry with the same telephone number is stored in the Contacts folder with a different name. The name in the **Quick Dials** folder is always the same as the name in the Contacts folder.

For more information, refer to **How the telephone and Personal Call Manager work together** on page 76.

Storing your contacts

A contact is any entry (name, number, etc.) you have stored in your 9617 telephone or Personal Call Manager. By storing contacts, you can easily access them to make calls.

In your 9617 telephone, you store contacts in the Directory and/or in Memory keys.

In Personal Call Manager, you store contacts in the Address book. The Address Book stores several phone numbers, the mailing address, the email address and personal notes for each contact name.

For more information, refer to the following topics:

- **Storing contacts in the M9617 telephone** on page 138
- **The Address Book in Personal Call Manager** on page 157

Storing contacts in the 9617 telephone

You can store the name and one telephone number for up to 106 contacts – 100 in the Directory and one in each of the six memory keys – directly in your 9617 telephone.

For more information, refer to the following topics:

- **The telephone Directory** on page 139
- **Memory keys and the M9617 telephone** on page 146

The telephone Directory

The 9617 stores the names and telephone numbers of up to 100 contacts in the Directory. You can dial these numbers by simply selecting them in the Directory.

Names are sorted alphabetically starting with their first character. (If you want your Directory sorted by the last name, enter the last name first.) If you do not enter a name, the item appears at the beginning of the Directory.

Note: When you press the ⌐Directory⌐ key on the telephone, the **Search** dialog appears on the computer screen when Personal Call Manager is running.

For more information, refer to the following topics:

■ **Adding a contact to the telephone Directory** on page 140

■ **Copying a contact from the Callers List**, **Redial List or a memory key to the Directory** on page 141

■ **Adding an active caller to the Directory** on page 142

■ **Editing the telephone Directory** on page 143

■ **Deleting contacts from the telephone Directory** on page 144

■ **Quick Dials and the M9617 Directory** on page 145

■ **Finding a contact in the telephone Directory** on page 234

Adding a contact to the telephone Directory

To add a new number and name:

1 Press ⌐Save ⌐.

2 Press ⌐Directory ⌐.

   Note: When you press ⌐Directory ⌐, the **Search** dialog box appears on the computer screen if Personal Call Manager is running.

3 Enter the number using the dialpad. You can enter a maximum of 24 digits. To backspace and erase digits, press ⌐ ← ⌐. To add digits, use the dialpad.

   Note: You can also save dialing pauses and links to network services in telephone numbers. For more information, refer to **Programming dialing pauses and links in telephone numbers** on page 175.

4 Press ⌐Save ⌐.

5 If you do not want a name, go to step 6. To enter a name, use the dialpad. (Refer to **Entering Names** on page 153.)

6 Press ⌐Save ⌐.

7 Press ⌐Rls⌐.

Note: You can also use the Quick Dials folder in Personal Call Manager to add a contact to the telephone Directory. For more information, refer to **Quick Dials and the M9617 Directory** on page 145.

Copying a contact from the Callers List, Redial List or a memory key to the Directory

To save to the Directory:

1   Access a contact in the Callers List, Redial List or a memory key.

2   Press `Save`.

3   Press `Directory`. If the name was stored with the number, both are now saved in the Directory and you are finished.

4   If no name is displayed, you are prompted to enter one. If you don't want a name, go to step 5. To enter a name, use the dialpad. (Refer to **Entering Names** on page 153.)

5   Press `Save`.

6   Press `Rls`.

Note: When you press `Directory`, the **Search** dialog box appears on the computer screen (if Personal Call Manager is running).

Adding an active caller to the Directory

To add an active caller:

1 Answer or make a call.

2 Press `Save`.

3 Press `Directory`. The name and/or number are saved in the Directory.

You cannot save the name and number of conference callers using this method. Instead, wait until the conference call is ended, and use the Callers List or the Redial List. Refer to **Copying a contact from the Callers List, Redial List or a memory key to the Directory** on page 141 for more information.

Note: When you press `Directory`, the **Search** dialog box appears on the computer screen (if Personal Call Manager is running).

Editing the telephone Directory

When you make changes to the Directory, the same changes are made to the **Quick Dials** folder in Personal Call Manager and vice versa.

To edit a number and/or name in the Directory:

1 Press [*Directory*].

Note: When you press [*Directory*], the **Search** dialog box appears on the computer screen (if Personal Call Manager is running).

2 Press [↓] or [↑] to find the item you want to edit.

3 Press [←] to start edit mode.

4 If you do not want to change the number, go to step 5. To backspace and erase digits, press [←]. To add digits, use the dialpad.

5 Press [*Save*].

6 If you do not want to change the name, go to step 7. To backspace and erase digits, press [←]. To add digits, use the dialpad. (For more information, refer to **Entering Names** on page 153.)

7 Press [*Save*]. If you edit the wrong item or want to quit without saving changes, press [*Directory*] or [*Rls*] before pressing [*Save*].

8 Press [*Rls*].

Deleting contacts from the telephone Directory

When you delete items from the Directory, the items are also deleted from the **Quick Dials** folder in Personal Call Manager (if the application is running).

To delete individual contacts:

1 Press [Directory].

   Note: When you press [Directory], the **Search** dialog box appears on the computer screen (if Personal Call Manager is running).

2 Press [↓] [↑] to find the contact you want to delete.

3 Press [Delete] twice.

4 Press [Rls].

To delete all contacts:

1 Press [Directory].

2 Press [Delete].

3 Press [Delete] again to confirm deletion of the entire Directory.

4 Press [Rls].

Quick Dials and the 9617 Directory

When Personal Call Manager starts, it compares the contacts in the 9617 telephone Directory and in the Personal Call Manager **Quick Dials** folder. If there are differences (if you have added a contact to the Directory on the 9617 telephone before turning on the computer, for example), Personal Call Manager synchronizes the lists based on the Startup Synchronization Setting.

For more information on how synchronization works, refer to **Changing the Startup synchronization setting** on page 134 and **Startup Synchronization settings** on page 135.

When you make changes to the Directory, the same changes are made to the **Quick Dials** folder in Personal Call Manager, and vice versa.

Note: Only the name and the default telephone number of each contact stored in the **Quick Dials** folder are copied to the telephone Directory.

For more information, refer to the following topics:

- **The Quick Dials folder** on page 160
- **How the telephone and Personal Call Manager work together** on page 76

Memory keys and the 9617 telephone

You can save the name and telephone number of anyone you call frequently in any of the six memory keys on the 9617 telephone. You can store more names and numbers in the Directory. Refer to **The telephone Directory** on page 139 for more information.

You can specify Ring Configuration features such as Always Ring, Never Ring, Special Ring and Pager Notification for contacts stored in memory keys. (You can also specify these features for the contacts stored in the **Quick Dials** folder.)

For more information, refer to the following topics:

- **Adding a contact to a memory key using the telephone** on page 147
- **Copying a contact from the Callers or Redial List to a memory key** on page 148
- **Adding a current caller to a memory key** on page 149
- **Labeling memory keys** on page 150
- **Editing memory keys** on page 151
- **Deleting memory keys** on page 152
- **Specifying Ring Configuration properties for contacts stored in memory keys** on page 155
- **The Memory Keys Assignment tab** on page 110
- **The Launch Pad application** on page 394

Adding a contact to a memory key using the telephone

To save a contact name and number:

1   Press $\boxed{\textit{Save}}$.

2   Press the memory key you want to save the number into.

3   Enter the number using the dialpad. You can enter a maximum of 24 digits. To backspace and erase digits, press $\boxed{\leftarrow}$. To add digits, use the dialpad.

   Note: You can also save dialing pauses and links to network services in telephone numbers. For more information, refer to **Programming dialing pauses and links in telephone numbers** on page 175.

4   Press $\boxed{\textit{Save}}$.

5   If you do not enter a name, go to step 6. To enter a name, use the dialpad. (For more information, refer to **Entering Names** on page 153.)

6   Press $\boxed{\textit{Save}}$.

7   Label the memory key. (Refer to **Labeling memory keys** on page 150.)

Copying a contact from the Callers or Redial List to a memory key

To copy a contact to a memory key:

1 Access a contact in the Redial List or Callers List.

2 Press $\boxed{Save}$.

3 Press the memory key you want to save the contact into. If the name was displayed with the number, both are now saved in the memory key and you're finished.

4 If no name is displayed, you are prompted to enter one. If you don't want a name, go to step 5. To enter a name, use the dialpad. (Refer to **Entering Names** on page 153.)

5 Press $\boxed{Save}$.

6 Label the memory key. (Refer to **Labeling memory keys** on page 150.)

Adding a current caller to a memory key

To save an active caller:

1 Answer or make a call.

2 Press $\boxed{Save}$.

3 Press the memory key you want to save the contact into. If the name was displayed with the number, both are now saved in the memory key.

Note: Do not press $\boxed{Rls}$ or else you will hang up on your caller. You cannot save the Caller ID of callers in an active conference call. You must wait until the conference call is completed.

Labeling memory keys

After programming a memory key, you should label it.

To label a memory key:

1 Write the name of the contact stored in the memory key on one of the supplied blank paper labels.

2 Place the paper label on top of the memory key.

3 Push one of the supplied clear plastic key caps onto the memory key as shown below to hold the paper label in place.
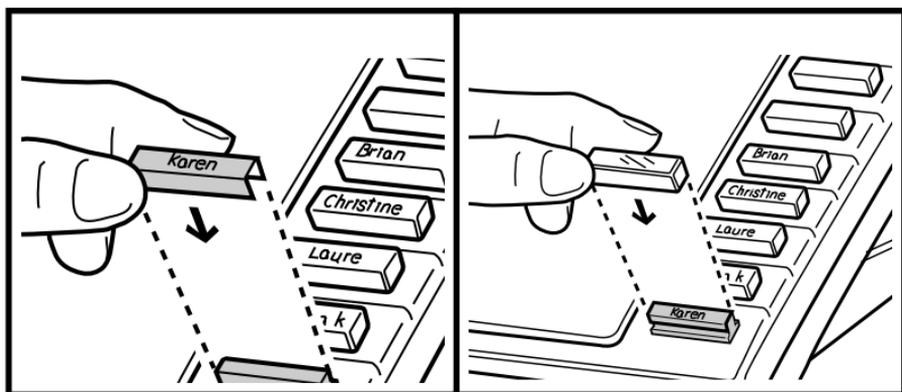
Warning: Keep loose keys and the sliding panel away from small children.

Editing memory keys

To edit the name and number stored in a memory key, the Live Dialpad option must be turned off. Refer to **Selecting the dialpad option** on page 239 for more information.

To edit a memory key:

1 To see its contents, press the memory key.

2 Press [←].

3 Edit or delete the number. To backspace and erase digits, press [←]. To add digits, use the dialpad. If you don't want to change the number, skip to step 4.

4 Press [*Save*].

5 Edit or delete the name. To add letters, use the dialpad. To erase letters, press [←]. (Refer to **Entering Names** on page 153.) If you don't want to change the name, skip to step 6.

6 Press [*Save*].

Deleting memory keys

The Live Dialpad option must be turned off to delete memory keys. Refer to **Selecting the dialpad option** on page 239.

To delete a memory key:

1 To see its contents, press the memory key.

2 To erase, press $\boxed{Delete}$ twice.

Exceptions

You can't delete a memory key using the steps above if you have assigned a software application or the Don't Disturb feature to it.

To delete a memory key linked to a software application, refer to **Clearing a memory key** on page 113.

To delete a memory key with the Don't Disturb feature, refer to **Deleting the Don't Disturb key** on page 326.

Entering Names

You can use the telephone dialpad to enter the names of contacts into the 9617 telephone.

Before you can use the dialpad to enter a name, you must first save or edit a number in the Directory or memory key.

After you have entered the telephone number, the telephone display prompts you to enter a name. To enter a letter, press the corresponding key on the dialpad until the letter you want appears. Once you see the character you want, wait two seconds for the cursor to shift to the right, or press [→]. Repeat this process for the rest of the letters. To insert a space, press [→].
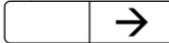
If you want to erase a letter (or a mistake), press [←].

The first letter of each word is automatically capitalized. To display upper case letters elsewhere, press [Hold], then press the appropriate dialpad key until you see the letter you want.

For example, to enter the name Ruth, press the following dialpad keys, waiting for 2 seconds where indicated: [7] [7] [7] [2 sec pause] [8] [8] [2 sec pause] [8] [2 sec pause] [4] [4].

For more information, refer to the following topic:

- **The characters each dialpad key can produce** on page 154

The characters each dialpad key can produce

You can use the 12 dialpad keys to enter names or words that appear in the Directory or a memory key in the 9617 telephone.

Dialpad key	Display characters it can produce
1	, - ' & . ( ) 1
2	a A b B c C 2
3	d D e E f F 3
4	g G h H i I 4
5	j J k K l L 5
6	m M n N o O 6
7	p P q Q r R s S 7
8	t T u U v V 8
9	w W x X y Y z Z 9
✳	*
0	0
#	#

Specifying Ring Configuration properties for contacts stored in memory keys

You can specify Ring Configuration features for memory key contacts just as you can for the contacts stored in the **Quick Dials** folder. These features are described below.

Always Ring – When you select this option, you are overriding the Do Not Disturb setting for the contact stored in the memory key. (When you activate the Do Not Disturb (DND) feature, the telephone does not ring when you receive a call.) For more information, refer to **Overriding DND for some contacts** on page 329.

Never Ring – When you select this option for a contact stored in a memory key, the telephone does not ring when this contact calls. (Note that if you haven't turned on the Suppress First Ring option, the telephone will ring once.) For more information, refer to **Screening your telephone calls** on page 312.

Special Ring – When you select a special ring for a contact stored in a memory key, you will hear a telephone ring that is different from the normal ring when this contact calls. (Note that if you haven't turned on the Suppress First Ring option, the telephone will ring once normally.) For more information, refer to **Screening your telephone calls** on page 312.

Pager Notification – When you select this option for a memory key contact, the pager feature will work for this contact even if you disable pager notification on both of your telephone lines. For more information, refer to **Pager Notification for Quick Dial and memory key contacts** on page 310.

A note about Quick Dials and memory keys

You can set ring configuration features for contacts stored in the telephone Directory or **Quick Dials** folder AND for contacts stored in memory keys. For more information, refer to **About Ring Configuration settings for Quick Dials contacts** on page 161.

If you store the same contact (i.e., the same telephone number) in the telephone Directory or **Quick Dials** folder AND a memory key, the ring configuration settings for the memory key take precedence.

To set the Ring Configuration for a memory key contact:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure** button. The **9617 Configuration Properties** dialog box appears.

4 Click on the **Memory Keys Assignment** tab.

5 Click on the memory key that stores the contact you want to override DND.

6 Click on the **Configure** button. A dialog box appears.

7 Select the checkboxes for the options you want to activate. When a checkbox is selected, a checkmark appears inside it.

8 Click the **OK** button on each dialog box to save your changes.

The Address Book in Personal Call Manager

You store the telephone numbers and addresses of your contacts in the Address Book. A contact is normally the telephone number of a person or business, but can be any number you want to keep track of or store in Personal Call Manager.

The Address Book has two views, the Tree View and the List View. Each view displays information in the address book differently.

For more information, refer to the following topics:

- **The Tree View section of the Address Book** on page 158
- **The List View section of the Address Book** on page 164
- **Entering contacts** on page 169
- **Importing and exporting contacts** on page 191
- **Editing contact information** on page 195
- **Organizing the Address book** on page 197

The Tree View section of the Address Book

On the left side of the Address Book is the Tree View, which shows how your folders are organized. To open or close a folder, click on it. A sample Tree View is shown on the right.

Contacts are stored in two main areas, the **My Contacts** folder and the **Quick Dials** folder.
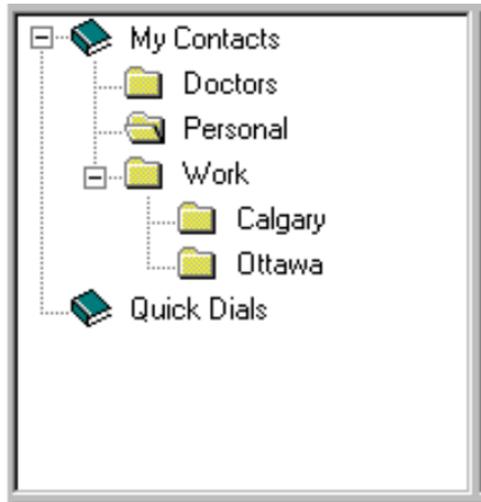
For more information, refer to the following topics:

- **The My Contacts folder** on page 159
- **The Quick Dials folder** on page 160

The My Contacts folder

You can add both contacts and folders to the **My Contacts** folder. (You can only add contacts to the **Quick Dials** folder.)

Folders help you organize your contacts. By grouping contacts into folders, contacts are easier to find and view on the screen.

You can change which folders are shown by clicking on certain portions of the Tree View.

Clicking on a box with " + " in it expands the folder beside it, showing the contacts and folders it contains.

Clicking on a box with " - " in it collapses the folder beside it, hiding the contacts and folders it contains.

Clicking on a folder opens or closes the folder. When a folder is open, its contents are shown in the List View section (the right side) of the Address Book.

The Quick Dials folder

The **Quick Dials** folder can hold 100 contacts. Contacts you add to the **Quick Dials** folder appear on the **Calls** menu and the Personal Call Manager task tray menu. (See **The task tray icon** on page 55.) You can only add contacts to the **Quick Dials** folder; you cannot add folders.

You should add contacts to this folder if:

- you use them frequently, or
- you want to specify special features for them.

For information about the special features you can assign to Quick Dial contacts, refer to **About Ring Configuration settings for Quick Dials contacts** on page 161.

The **Quick Dials** folder synchronizes with the telephone Directory. For more information, refer to **Quick Dials and the M9617 Directory** on page 145.

For more information, refer to **Adding a new contact to the Address Book** on page 170.

About Ring Configuration settings for Quick Dials contacts

You can specify the following special Ring Configuration features for the contacts stored in your **Quick Dials** folder:

Always Ring – When you select this option for a **Quick Dials** contact, you are overriding the Do Not Disturb setting for that contact. (When you activate the Do Not Disturb (DND) feature, the telephone does not ring when you receive a call.) For more information, refer to **Overriding DND for some contacts** on page 329.

Never Ring – When you select this option for a Quick Dial contact, the telephone does not ring when this contact calls. (Note that if you haven't turned on the **Suppress First Ring** option, the telephone rings once.) For more information, refer to **Screening your telephone calls** on page 312.

Special Ring – When you select a special ring for a Quick Dial contact, you will hear a telephone ring that is different from the normal ring when this contact calls. (Note that if you haven't turned on the **Suppress First Ring** option, the telephone will ring once normally.) For more information, refer to **Screening your telephone calls** on page 312.

Pager Notification – When you select this option for a Quick Dials contact, the pager feature will work for this contact even if you disable pager notification on both of your telephone lines. For more information, refer to **Pager Notification for Quick Dial and memory key contacts** on page 310.

A note about Quick Dials and memory keys

You can set ring configuration features for contacts stored in the telephone Directory or **Quick Dials** folder AND for contacts stored in memory keys. For more information, refer to **Specifying Ring Configuration properties for contacts stored in memory keys** on page 155.

If you store the same contact (i.e., the same telephone number) in the telephone Directory or **Quick Dials** folder AND a memory key, the ring configuration settings for the memory key take precedence.

For more information, refer to the following topic:

■ **Setting the Ring Configuration for Quick Dials contacts** on page 163

Setting the Ring Configuration for Quick Dials contacts

Using the right mouse button:

1 Right-click on a contact.

2 Point to the **9617 Options** menu item. A submenu appears.

3 Click on the **9617 Properties** menu item. The **9617 Property** dialog box appears.

4 Select the checkboxes next to the options you want to set. When an option is selected, a checkmark appears in the check box.

Using the toolbar:

1 Click on a contact.

2 Click on the Properties button on the toolbar (shown on the right). The **9617 Property** dialog box appears.

3 Select the checkboxes next to the options you want to set. When an option is selected, a checkmark appears in the check box.

Tip: You can use the **Quick Dials Manager** to view and/or change the Ring Configuration settings for all of your Quick Dials on one dialog box. For more information, refer to **Using the Quick Dial Manager** on page 331.

You can also specify these features for contacts stored in the telephone's memory keys. For more information, refer to **Specifying Ring Configuration properties for contacts stored in memory keys** on page 155.

For more information, refer to **Adding a new contact to the Address Book** on page 170.

The List View section of the Address Book

The List View is on the right side of the Address Book. The List View displays the contacts and folders stored in the folder selected in the Tree View (the left side).

The List View of the Address Book can be viewed in four different formats: large icons, small icons, list, and report.

For more information, refer to the following topics:

- **Displaying the Address Book as large icons** on page 165
- **Displaying the Address Book as small icons** on page 166
- **Displaying the Address Book as a list view** on page 167
- **Displaying the Address Book as a report view** on page 168

Displaying the Address Book as large icons

When you choose the large icon view, each contact is shown with the name of the contact below the icon.

To view large icons:

- Click on , or click on the **Views** menu then click on the **Large Icon** menu item.
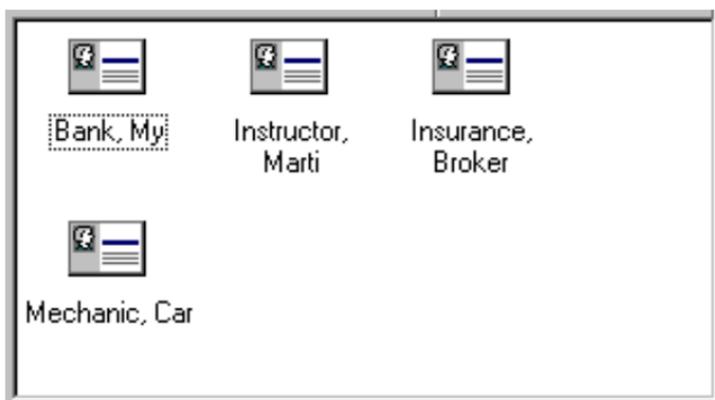
Displaying the Address Book as small icons

When you choose the small icon view, each contact is shown with the name of the contact to the right of the icon, and the contacts are arranged horizontally.

To view small icons:

■ Click on [icon], or click on the **Views** menu then click on the **Small Icon** menu item.

Bank, My	Instructor, Marti
Insurance, Broker	Mechanic, Car
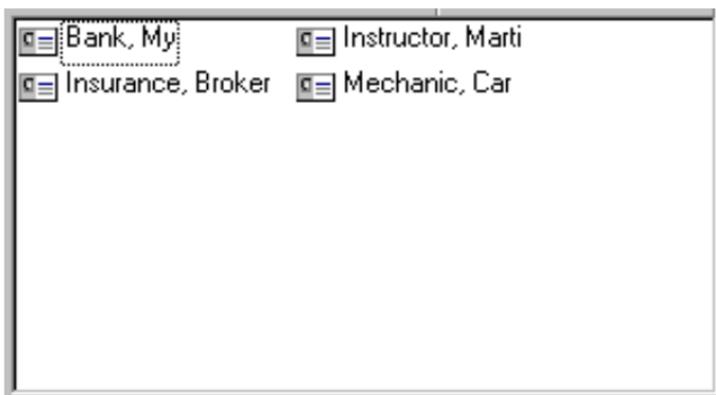
Displaying the Address Book as a list view

In list view, each contact is shown with the name of the contact to the right of the icon, and the contacts are arranged vertically.

To view your contacts as a list:

- Click on ![list icon], or click on the **Views** menu then click on the **List** menu item.

> ▣≡ Bank, My
> ▣≡ Instructor, Marti
> ▣≡ Insurance, Broker
> ▣≡ Mechanic, Car
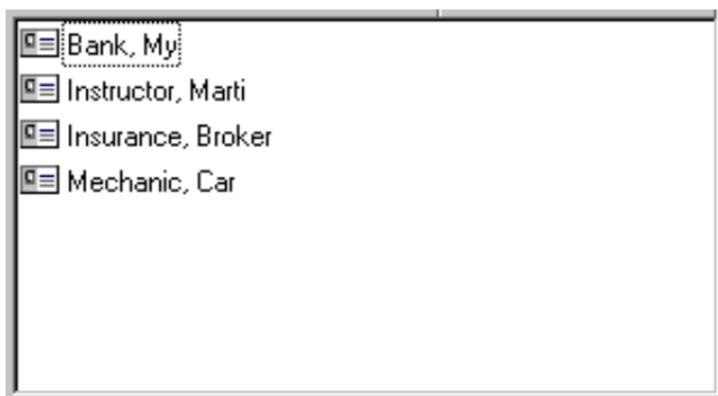
Displaying the Address Book as a report view

A report view displays detailed information, including the contact's last name, first name, telephone numbers and extensions, Fax number and Email Address.

To view the details of your contacts:

- Click on ▦, or click on the **Views** menu then click on the **Report** menu item.
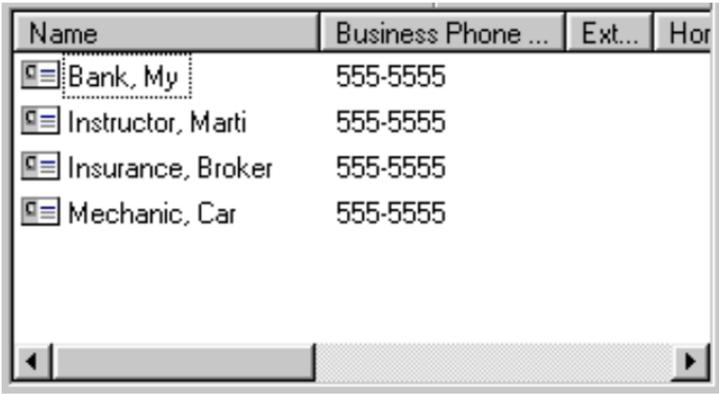
Name	Business Phone ...	Ext...	Hor
▣ Bank, My	555-5555		
▣ Instructor, Marti	555-5555		
▣ Insurance, Broker	555-5555		
▣ Mechanic, Car	555-5555		

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Entering contacts

A contact is any entry in the Address Book. A contact can be a person, business, or any number or address you want stored in Personal Call Manager.

The Address Book is divided into two main sections: **My Contacts** and **Quick Dials**. The **My Contacts** folder is used to store your contacts. The **Quick Dials** folder is used to store contacts that you use frequently.

The contacts that you add to the **Quick Dials** folder appear in the **Quick Dials** menu item in the **Calls** menu or the Personal Call Manager task tray menu. (See **The task tray icon** on page 55.)

The **Quick Dials** folder is synchronized with the Directory in the 9617 telephone. A change to either one is reflected in the other (refer to **Quick Dials and the M9617 Directory** on page 145).

For more information, refer to the following topics:

- **Adding a new contact to the Address Book** on page 170

- **Adding a caller to the Address Book** on page 189

- **Copying a contact from the Calls Log to the Address Book** on page 190

- **Importing and exporting contacts** on page 191

- **Editing contact information** on page 195

- **Quick Dials and the M9617 Directory** on page 145

- **The Memory Keys Assignment tab** on page 110

Adding a new contact to the Address Book

Contacts are added to the Address Book using the **Address Properties** dialog box. You add contacts to the **My Contacts** folder and the **Quick Dials** folder the same way.

Note: When you add contacts to the **Quick Dials** folder, they are also added to the telephone Directory.

Using the menu or toolbar:

1   Click on the folder you want to add the contact to.

2   Click on the **File** menu.

3   Point to the **New** menu item. A submenu appears.

4   Click on the **Contact** menu item. The **Address Properties** dialog box appears.

Tip: Instead of doing steps 2, 3 and 4, click on the New Contact button on the toolbar (shown on the right).

5   Enter the contact information on each tab. For more information, refer to **The Address Properties dialog box** on page 172.

Using the right mouse button:

1   Right-click on the folder in the Tree View (i.e., the left side of the Address Book) that you want to add a contact to, OR right-click on an open area in the List View (i.e., the right side of the Address Book).

2   Point to the **New** menu item. A submenu appears.

3 Click on the **Contact** menu item. The **Address Properties** dialog box appears.

4 Enter the contact information on each tab. For more information, refer to **The Address Properties dialog box** on page 172.

The Address Properties dialog box

The **Address Properties** dialog box consists of four tabs. Each tab is used to enter a different type of contact information.

To use the **Address Properties** dialog box, select each tab and fill out the information as desired. (The tabs are described in more detail below). When you are finished, click on the **OK** button.

Click on one of the following topics to find out more information about it.

- **Business** – Use this tab to enter the name, address, and telephone numbers of the contact.

- **Email Address** – Use this tab to enter the Email address and type.

- **Settings** – Use this tab to define the default telephone number used, and to specify the Call Announce Voice file path and Image file path (used to identify the contact when he or she calls).

- **Note** – Use this tab to enter any other information about the contact.

Business

The **Business** tab is used to enter the name, address, and telephone number of a contact, as well as other contact information.

Note: Do not press the **Enter** key (to create line breaks) in the **Address** field. If you enter hard returns in this field, you may have problems importing and exporting contacts.

Information that you must fill in

You must enter the first name, last name and at least one phone number before you can successfully add a contact to the Address Book.

The name you enter into the **Last Name** and **First Name** fields appears in the Calls box when you are on a call to this contact.

The **Phone number** field is a drop list that allows you to enter four different telephone numbers. You can enter the Business (with an extension number), Home, Mobile, and Fax telephone numbers for the contact.

The numbers you enter can be dialed from the task tray or the Personal Call Manager main window. (See **The task tray icon** on page 55.)

Important: **DO NOT** enter dashes in telephone numbers.

You can also program dialing pauses and links to network services in telephone numbers you store in Personal Call Manager. For more information, refer to **Programming dialing pauses and links in telephone numbers** on page 175.

Information you can choose to fill in

If you want, you can enter the contact's address, title, Company, Department, Office, and Assistant.

Programming dialing pauses and links in telephone numbers

You can program dialing pauses and links to network services in telephone numbers you store in the telephone or in Personal Call Manager.

Saving dialing pauses in a telephone number

You might want to enter a pause after a seven-digit telephone number so that the call is answered before Personal Call Manager dials an access code.

If you are saving a telephone number in the telephone Directory, press the `Hold` key where you want to enter a pause. For example, if you entered 555-5555 `Hold` `Hold` `Hold` 123 into the Directory, the telephone would dial the first seven digits, wait about five seconds, then dial the last three digits.

If you are saving a telephone number in the Personal Call Manager **Address Properties** dialog box, add a comma (,) to the number where you want the pause. For example, if you saved the number 555-5555,,,123, Personal Call Manager would dial the first seven digits, wait about five seconds, then dial the last three digits.

Accessing telephone network services

To access network services using your telephone, you press the `Link` key. For example, to make a Three Way call, you need to press this key to conference two callers together.

When you save a telephone number in the telephone Directory or Personal Call Manager, you can program the Link key into the number so that it is automatically dialed out.

If you are saving a telephone number in the telephone Directory, press the [*Link*] key to enter a Link press. For example, if you saved the number 555-5555,,, [*Link*] 444-4444, the 9617 telephone would dial the first seven digits, pause for a few seconds to allow the call to be answered, dial the [*Link*] key, and then dial the last seven digits.

Note: The commas are dialing pauses. Refer to the previous page for more information.

If you are saving a telephone number in the Personal Call Manager **Address Properties** dialog box, enter an exclamation mark (!) into the number to enter a Link press. For example, if you saved the number 555-5555,,,!444-4444, Personal Call Manager would dial the first seven digits, pause for a few seconds to allow the first call to be answered, dial the [*Link*] key, and then dial the last seven digits.

Note: The commas are dialing pauses. Refer to the previous page for more information.

Email Address

The **Email Address** tab allows you to store email information for your convenience. Note that you can't send email using Personal Call Manager.
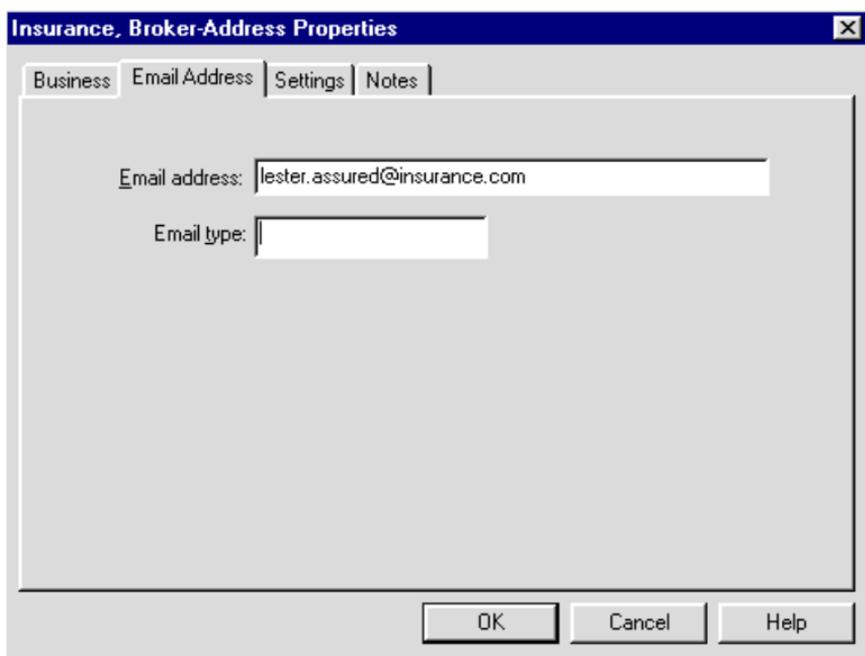
```
Insurance, Broker-Address Properties                            ✕

 Business  Email Address | Settings | Notes |


      Email address: lester.assured@insurance.com

        Email type: |



                          OK          Cancel        Help
```

Use the **Email address** field to enter the contact's E-mail address.

Use the **Email type** field to enter a description of the email address. For example, "Personal email account."

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Settings

The **Settings** tab allows you to specify which telephone number is dialed by default when you make a call by:

- double-clicking on a contact icon in the Address Book;

- dragging a contact icon from the Address Book to the Calls box; or

- using the **Quick Dials** menu item in the **Calls** and task tray menus.

You can also specify the Call Announce Voice file path and Image file path.

For more information, refer to the following topics:

- **Setting the default telephone number** on page 179

- **Call Announcements that tell you who is calling** on page 180

- **Using graphics to identify callers** on page 184

Setting the default telephone number

You specify which telephone number–Business, Home, or Mobile–is the default telephone number. The default telephone number is the number that is dialed automatically unless you specify otherwise.
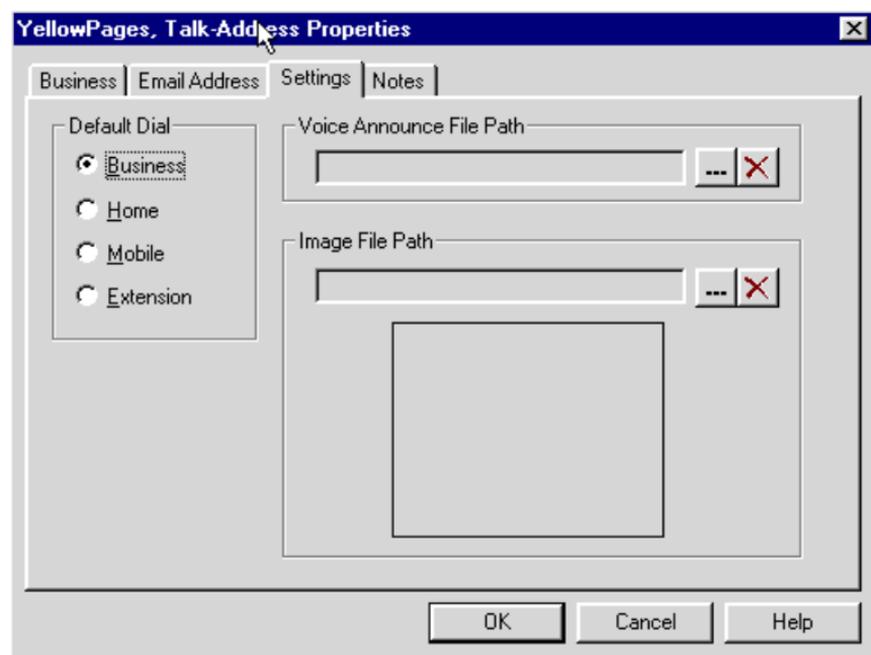
The Default Dial setting you specify here applies to this contact only.

You can override this setting when making a call. For more information, refer to **Making a call using Personal Call Manager** on page 241.

Call Announcements that tell you who is calling

Personal Call Manager lets you specify Call Announcements for the contacts in your Address Book so you can hear who is calling.

If you subscribe to a Caller ID service, Personal Call Manager compares the number sent by the telephone company with the numbers stored in the Address Book. If a match is found and you have specified a Call Announcement for the matching contact, you will hear the Call Announcement through your computer speakers.

There are two steps to using Call Announcements.

1 Record a Call Announcement using a sound recording program that produces .WAV files, or locate a suitable existing .WAV file.

2 Select the contact in the Address Book and then specify the location of the Call Announcement sound file.

Note: To record and use a Call Announcement, you need a microphone, a sound card, computer speakers and sound recording software. You can use pre-recorded wave (.wav) files if you cannot record sounds.

For more information, refer to the following topics:

- **Specifying Call Announcements using the menu bar** on page 181
- **Specifying a Call Announcement using the right mouse button** on page 182
- **Using graphics to identify callers** on page 184

Specifying Call Announcements using the menu bar

To specify a Call Announcement:

1 Find the contact in the Address Book. You can find the contact manually or by using the Personal Call Manager Search feature. Refer to **Finding a contact in the Address Book** on page 254 for more information.

2 Click on the contact.

3 Click on the **File** menu.

4 Click on the **Properties** menu item. The **Address Properties** dialog box appears.

Tip: Instead of doing steps 3 and 4, click on the Properties button on the toolbar (shown on the right).

5 Click on the **Settings** tab.

6 Click on the Browse button (shown on the right) to the right of the **Voice Announce File Path** field. The **Open** dialog box appears.

7 Navigate to and select the sound file.

8 Click on the **Open** button

9 Click on the **OK** button.

Note: Click on ✖ to remove a Voice Announce File Path.

Specifying a Call Announcement using the right mouse button

To specify a Call Announcement:

1 Find the contact in the Address Book. You can find the contact manually or by using the Personal Call Manager Search feature. Refer to **Finding a contact in the Address Book** on page 254 for more information.

2 Right-click on the contact.

3 Click on the **Properties** menu item. The **Address Properties** dialog box appears.

4 Click on the **Settings** tab.

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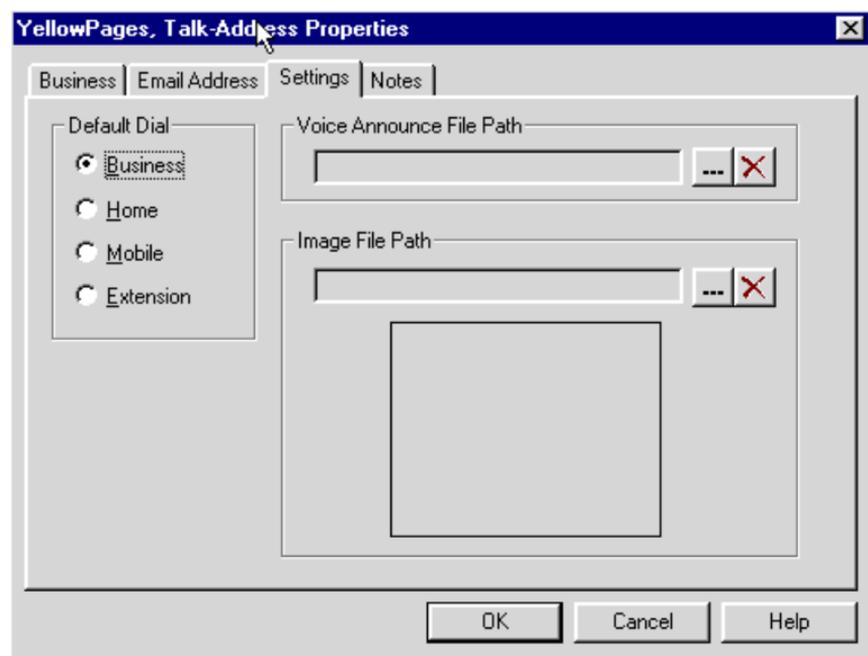
5 Click on the Browse button (shown on the right) to the right of the **Voice Announce File Path** field. The **Open** dialog box appears.

6 Navigate to and select the sound file.

7 Click on the **Open** button

8 Click on the **OK** button.

Note: Click on ☒ to remove a Voice Announce File Path.

Using graphics to identify callers

You can identify incoming callers that are stored in your Address Book using graphics. When you specify a graphic for a caller, the graphic appears in the **You Have a New Call** dialog box when that contact calls.

There are two steps to using graphics.

1 Create a graphic in the .BMP (bitmap) file format.

2 Select the contact in the Address Book and then specify the location of the graphic file.

For more information, refer to the following topics:

- **Specifying a graphic using the menu bar or toolbar** on page 185

- **Specifying a graphic using the right mouse button** on page 186

Specifying a graphic using the menu bar or toolbar

To specify a graphic:

1 Find the contact in the Address Book. You can find the contact manually or by using the Personal Call Manager Search feature. Refer to **Finding a contact in the Address Book** on page 254 for more information.

2 Click on the contact.

3 Click on the **File** menu.

4 Click on the **Properties** menu item. The **Address Properties** dialog box appears.

Tip: Instead of doing steps 3 and 4, click on the Properties button on the toolbar (shown on the right).

5 Click on the **Settings** tab.

6 Click on the Browse button (shown on the right) to the right of the **Image File Path** field. The **Open** dialog box appears.

7 Navigate to and select the image file.

8 Click on the **Open** button

9 Click on the **OK** button.

Note: Click on the Delete button (shown on the right) to delete an Image File Path.

Specifying a graphic using the right mouse button

To specify a graphic:

1 Find the contact in the Address Book. You can find the contact manually or by using the Personal Call Manager Search feature. Refer to **Finding a contact in the Address Book** on page 254 for more information.

2 Right-click on the contact.

3 Click on the **Properties** menu item. The **Address Properties** dialog box appears.

4 Click on the **Settings** tab.
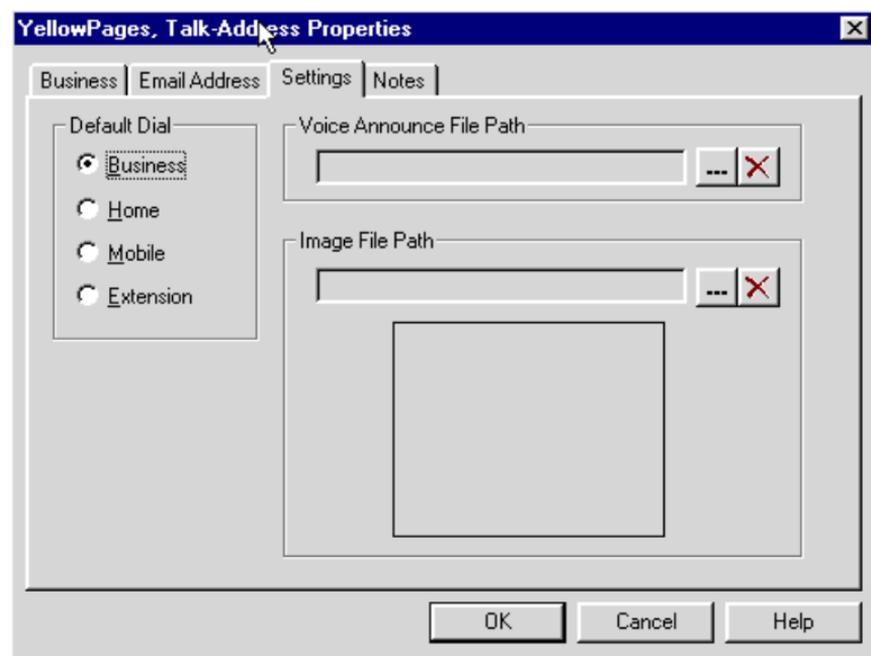
5 Click on the Browse button (shown on the right) to the right of the **Image File Path** field. The **Open** dialog box appears.

6 Navigate to and select the image file.

7 Click on the **Open** button

8 Click on the **OK** button.

Note: Click on the Delete button (shown on the right) to delete an Image File Path.

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Note

You use the **Note** tab to record miscellaneous information about a contact. You can enter significant dates, recent orders, meeting locations or any information you want handy when you call the contact.

If you right-click on a caller in the Calls box and then click on the **Properties** menu item, the **Address Properties** dialog box appears showing the **Note** tab if that caller is already stored in the Address Book. When the **Note** tab appears, you can click in the text area and begin typing notes.

If the caller is not in the Address Book, you are given the option of adding the caller to the Address Book, so you can add notes.

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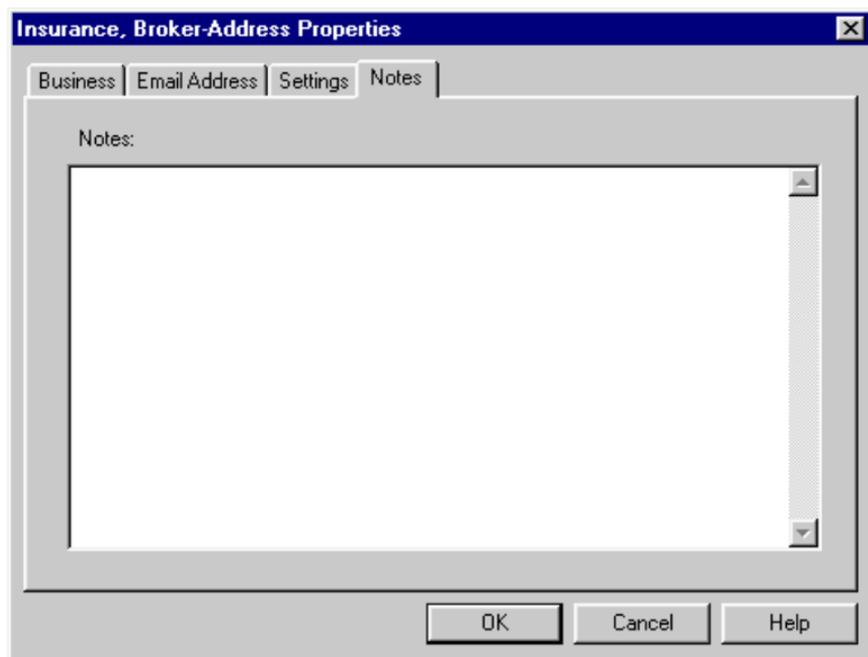
Adding a caller to the Address Book

When you receive a call, you can add that caller to your Address Book. The Personal Call Manager main window must be open before you add a caller.

To add a caller:

1 Right-click on the caller's icon in the Calls box.

2 Click on the **Save** menu item. The **Address Properties** dialog box appears. If you subscribe to the Caller ID service, the telephone number, and name if available, are automatically entered into the dialog box. (If the caller has already been saved into the Address Book, a dialog box appears asking you if you want to modify the contact entry.)

Tip: Instead of doing steps 1 and 2, point to the call in the **Calls** menu and click on the **Save** or **Properties** menu item, or click on the call icon and click on the Properties toolbar button.

3 Enter the address information for this contact. For descriptions of the address fields refer to **The Address Properties dialog box** on page 172.

4 Click on the **OK** button.

The contact is added to the folder that is selected in the Tree View (the left side) of the Address Book. The contact appears in the List View (the right side of the Address Book).

Copying a contact from the Calls Log to the Address Book

To copy contacts:

1. Click on the **View** menu.

2. Click on the **Show Call Log Window** menu item. Either the **Incoming Calls Log Window** or the **Outgoing Calls Log Window** appears.

3. Click on the **View** menu.

4. Click on either the **Incoming Calls Log** or **Outgoing Calls Log** menu items to display the log that contains the contact you want to copy to the Address Book.

5. Click on the contact and then click on the **Edit** menu.
   OR
   Right-click on the contact.

6. Click on the **Copy** menu item.

7. Click on the folder you want to copy the contact into in the Tree View (i.e., the left side) of the Address Book, and click on the **Edit** menu.
   OR
   Right-click on the folder you want to copy the contact into.

8. Click on the **Paste** menu item.

Importing and exporting contacts

You can import and export contact information into and out of Personal Call Manager. Information is imported from and exported to comma delimited text files.

The text files you import can be created in a text editor, spreadsheet or a database.

The files you export can be used by a text editor, spread sheet or database. You can also export your Address Book so that you can print it out.

For more information, refer to the following topics:

- **Importing contacts from a text file** on page 192
- **Exporting contacts to a text file** on page 194
- **Printing your Address Book** on page 386

Importing contacts from a text file

The text files you import can be created in a text editor, spreadsheet or a database.

Whatever the case, make sure your file only includes data that corresponds to the fields on the tabs of the **Address Properties** dialog box. (To access this dialog box, right-click on a contact in the Address Book and click on the **Properties** menu item.)

To make it easy to sort the data fields correctly when importing, make sure the first record in the text file is complete (i.e., has data for each field you want to import).

The text fields in the text file you are importing must be separated by commas, and there must be a line return at the end of each contact's information (record). When creating the text file using a spreadsheet or database application, be sure to choose the "comma delimited text" file format.

Note: If necessary, change the file extension of the file you are importing from to ".txt" so that Personal Call Manager can recognize it. For example, some programs save comma delimited text files with the extension ".csv".

If you are importing a file that has been exported by Personal Call Manager, you should ensure that the **Default Dial** field is assigned properly. This field determines the default number for an imported contact.

The possible values for the **Default Dial** field are: "B" (for business number), "H" (for home number), "M" (for mobile number) and "E" (for extension number). The import feature ignores other letters and characters. Be sure to assign data with one of these values to this import field.

If the file was not exported by Personal Call Manager (i.e., if it was exported by database or spreadsheet program), there may not be a field that matches this description. In this case, set this field to "none". You can set the **Default Dial** field later in the contact's **Address Properties** dialog box.

To import contacts:

1 Click on the **File** menu.

2 Click on the **Import Contact** menu item. The **Import contact from text file** dialog box appears.

3 Click on the Browse button to the right of the **Source Text File** field. The **Open** dialog box appears.

4 Select the text file you are importing and click on the **Open** button. The information for the first record appears in the **Fields Assignment** area.

5 If the information appears in the **Fields Assignment** area in the correct order, then go to step 6. If the information does not appear in the **Fields Assignment** area in the correct order, click on the drop list arrow to the right of each test field and choose the correct information.

6 Click on the **Import** button. The imported addresses are placed in a folder called "Imported Contacts."

Exporting contacts to a text file

When exporting information to a text file, you can choose how that the data is exported.

To export contact information:

1 Click on the **File** menu.

2 Click on the **Export Contact** menu item. The **Export contact into text file** dialog box appears.

3 Click on the Browse button to the right of the **Source Text File** field. The **Save As** dialog box appears.

4 Select the location where you want to save the text file and specify a filename.

5 Click on the **Save** button.

6 If the information is in the order you want to export it, go to step 7. If not, click on the drop list arrow to the right of each test field and choose information until the data appears in the correct order.

7 Click on the **Export** button.

Tip:If you are exporting your contacts for import by another Personal Call Manager user, it is recommended that you use the default field order for both the import and export operation. This will ensure that data fields are correctly assigned.

Editing contact information

The information stored with a contact can be easily updated as required. Contact information can be edited on the contact's **Address Properties** dialog box.

To change the properties of a contact:

1 Find the contact in the Address Book. You can find the contact manually or by using the Personal Call Manager Search feature. Refer to **Finding a contact in the Address Book** on page 254 for more information.

2 Right-click on the contact and then click on the **Properties** menu item.

OR

Click on the contact, click on the **File** menu and then click on the **Properties** menu item.

OR

Click on the contact and then click on the Properties button on the toolbar (this button is black).

The **Address Properties** dialog box appears.

Jazz, White-Address Properties

Business | Email Address | Settings | Notes

Name
Last: Jazz   First: White

Address: Title:
Company:
Department:

City: Office:
State/Province: Assistant:
Zip/Postal code: Phone number: Ext:
Country: Business ▼ 555-5555

OK   Cancel   Help

3 Select the tab that has the information you want to change.

4 Make the required changes. For more information on the information that you can change, refer to **The Address Properties dialog box** on page 172. **Note:** Do not press **Return** while entering information in the **Address** field.

5 If necessary, select another tab and repeat step 4.

6 Click on the **OK** button.

Note: When you make changes to the name or number of contacts in the **Quick Dials** folder, the same changes are made to the telephone Directory, and vice versa.

Organizing the Address book

Personal Call Manager makes it easy for you to copy, move or delete contacts.

You can organize the contacts in the Address Book into folders. For example, you may want to add two folders, one named Personal and the other named Business. You could then store all of your business contacts in one folder and all of your personal contacts in the other.

Note: You can't add folders to the **Quick Dials** folder.

For more information, refer to the following topics:

Copying a contact

By copying an existing contact, you can create a new contact based on the existing one. Personal Call Manager allows you to make two kinds of copies, a linked copy and a template copy.

When you make a linked copy, all of the information about the contact is copied, and the copied information remains linked to the original information. A change to one contact is also made in the other(s).

When you make a template copy, all of the contact's information except the name is copied. The information is not linked to the original.

In both methods of copying, the original contact remains in the original folder.

For more information, refer to the following topics:

- **Deciding which copy method to use** on page 199
- **Using the linked copy method** on page 200
- **Using the template copy method** on page 204

Deciding which copy method to use

The copy method you choose depends on what you want to do. (See page 198 for a description of each.)

The Linked copy method

Use the linked copy method when you want to have identical copies of a single contact in several different folders so the contacts are easier to find and organize.

A linked copy remains linked to the entry it was copied from. When you change one of the properties of the contact (either in the original or the copy), Personal Call Manager automatically updates the original contact and all of its copies. This ensures that all of your copies of the contact are updated.

Note: When you delete a linked copy of a contact, other linked copies are not affected.

For information, refer to **Using the linked copy method** on page 200.

The Template copy method

When you create a template copy, Personal Call Manager does not link the new contact to the original contact.

The most common use of the template copy feature is to create a new contact that is similar, but not identical to, an existing contact. For example, a new person joins a company you deal with. The address and telephone number of the new contact is the same as it was for the old one, but the name is different.

For information, refer to **Using the template copy method** on page 204.

Using the linked copy method

Use this method when you want to create a copy of a contact that is linked to an original contact. For information about the two different methods of copying a contact, refer to **Deciding which copy method to use** on page 199.

For more information, refer to the following topics:

- **Using the template copy method** on page 204
- **Making a linked copy of a contact using drag and drop** on page 202
- **Making a linked copy of a contact using the right mouse button** on page 203

Making a linked copy of a contact using the menu or toolbar

To make a linked copy of a contact:

1 Click on the contact you want to copy.

2 Click on the **Edit** menu.

3 Click on the **Copy** menu item.

Tip: Instead of doing steps 2 and 3, click on the Copy button on the toolbar (shown on the right).

4 Open the folder you want to copy the contact into. The contents of the folder appear in the List View box.

5 Click on the **Edit** menu.

6 Click on the **Paste** menu item. The contact is copied to the new folder.

Tip: Instead of doing steps 5 and 6, click on the Paste button on the toolbar (shown in the right).

Making a linked copy of a contact using drag and drop

To copy a contact using drag and drop, both the contact you are copying and the destination folder must be visible.

To make a linked copy of a contact:

1   Press and hold the **Ctrl** key on your computer keyboard.

2   Drag the contact to the folder you want the contact copied to.

Making a linked copy of a contact using the right mouse button

To make a linked copy of a contact:

1 Right-click on the contact you want to copy.

2 Click on the **Copy** menu item.

3 Open the folder you want to copy the contact into. The contents of the folder appear in the List View box.

4 Right-click on an open area in the folder.

5 Click on the **Paste** menu item. The contact is copied to the new folder.

Using the template copy method

Use this method when you want to create a new contact that is similar to an existing contact. All of the contact information except the contact name is copied to the new contact.

For example, you could quickly make Directory entries for five people who work at the same company. Their business addresses would all be the same; only the names would change.

For more information, refer to the following topics:

- **Deciding which copy method to use** on page 199

- **Making a template copy of a contact using the menu bar** on page 205

- **Making a template copy of a contact using the right mouse button** on page 206

Making a template copy of a contact using the menu bar

To copy a contact:

1 Click on the contact you want to copy.

2 Click on the **Edit** menu.

3 Click on the **Copy** menu item.

4 Open the folder you want to copy the contact into. The contents of the folder appear in the List View box.

5 Click on the **Edit** menu.

6 Click on the **Paste Special** menu item. The address properties dialog box appears. All of the information is the same as the original contact except the name field is blank.

7 Enter the name of the contact. You can also change any of the other information on the dialog box.

8 Click on the **OK** button.

After the contact is copied into the folder, you can open the contact properties and change any properties that are required. Refer to **Editing contact information** on page 195 for more information.

Making a template copy of a contact using the right mouse button

To copy a contact:

1 Right-click on the contact you want to copy.

2 Click on the **Copy** menu item.

3 Open the folder you want to copy the contact into. The contents of the folder should be showing in the List View box.

4 Right-click anywhere in the List View box (the right side of the Address Book).

5 Click on the **Paste Special** menu item. The **Address Properties** dialog box appears. All of the information is the same as the original contact except the name field is blank.

6 Enter the name of the contact. You can also change any of the information on the dialog box.

7 Click on the **OK** button.

After the contact is copied into the folder, you can open the contact properties and change any properties that are required. Refer to **Editing contact information** on page 195 for more information.

Moving a contact

Contacts can be moved from one folder to another to help organize the Address Book. When you move a contact, it does not remain in the original folder.

For more information, refer to the following topics:

- **Moving a contact using the menu bar** on page 208

- **Moving a contact using drag and drop** on page 209

- **Moving a contact using the right mouse button** on page 210

Moving a contact using the menu bar

To move a contact:

1 Click on the contact you want to move.

2 Click on the **Edit** menu.

3 Click on the **Cut** menu item. The icon for the contact dims.

Tip: Instead of doing steps 2 and 3, click on the Cut button on the toolbar (shown on the right). The icon for the contact dims.

4 Open the folder you want to move the contact into. The contents of the folder appear in the List View box.

5 Click on the **Edit** menu.

6 Click on the **Paste** menu item. The contact is moved to the new folder.

Tip: Instead of doing steps 5 and 6, click on the Paste button on the toolbar. The contact is moved to the new folder.

Note: After you have used the Cut command (indicated by the contact icon dimming), you must use the Paste command to move the contact before using the Cut or Copy commands again. If you use the Cut or Copy command before pasting the contact, the contact you cut first remains in its original folder.

Moving a contact using drag and drop

To move a contact using drag and drop, both the contact and the folder you are moving it to must be visible in the address book.

To move a contact:

1 Drag the contact you want to move to the folder you want the contact moved to.

Moving a contact using the right mouse button

To move a contact:

1 Right-click on the contact you want to move.

2 Click on the **Cut** menu item. The icon for the contact dims.

3 Open the folder you want to move the contact into. The contents of the folder appear in the List View box.

4 Right-click on an open area in the folder.

5 Click on the **Paste** menu item. The contact is moved to the new folder.

Note: After you have used the Cut command (indicated by the contact icon dimming), you must use the Paste command to move the contact before using the Cut or Copy commands again. If you use the Cut or Copy command before pasting the contact, the contact you cut first remains in its original folder.

Deleting a contact

Using the menu bar:

1 Click on the contact you want to delete.

2 Click on the **Edit** menu.

3 Click on the **Delete** menu item.

Using the right mouse button:

1 Right-click on the contact you want to delete.

2 Click on the **Delete** menu item.

Using the keyboard:

1 Click on the contact you want to delete.

2 Press the Delete key on the keyboard.

Note: You can restore a deleted contact if you select the **Edit** menu **Undo** menu item immediately after you delete it.

Using folders to organize contacts

Personal Call Manager allows you to easily organize your contacts using folders.

For more information, refer to the following topics:

- **Creating a new folder in the Address Book** on page 213
- **Copying and pasting a folder** on page 216
- **Moving a folder** on page 220
- **Renaming a folder** on page 225
- **Deleting a folder** on page 226

Creating a new folder in the Address Book

You can create a new folder in which to store contacts. When you add a new folder, it is always placed inside the folder selected in the Tree View (on the left) of the Address Book.

Note: You cannot add folders to the **Quick Dials** folder.

For more information, refer to the following topics:

- **Creating a new folder using the menu bar or toolbar** on page 214
- **Creating a new folder using the right mouse button** on page 215
- **Copying and pasting a folder** on page 216

Creating a new folder using the menu bar or toolbar

To create a new folder:

1 In the Tree View of the Address Book (the left side), click on the folder you want to put the new folder into.
Note: You cannot add folders to the **Quick Dials** folder in the Address Book.

2 Click on the **File** menu.

3 Point to the **New** menu item. A submenu appears.

4 Click on the **Folder** menu item. The **Create New Folder** dialog box appears.

Tip: Instead of doing steps 2, 3 and 4, click on the New Folder button on the toolbar (shown on the right).

5 Type the name of the new folder.

6 Click on the **OK** button. The new folder is added to the selected folder.

Note: When naming the new folder, you must use a name that is not used by another folder.

Creating a new folder using the right mouse button

To create a new folder:

1 In the Tree View of the Address Book (the left side), click on the folder you want to put the new folder into.
Note: You cannot add folders to the **Quick Dials** folder in the Address Book.

2 Right-click on an open area in the List View (the right side of the Address Book).

Tip: Instead of doing steps 1 and 2, you can right-click on the folder in the Tree View (left side of the Address Book) you want to add the new folder to.

3 Point to the **New** menu item. A submenu appears.

4 Click on the **Folder** menu item. The **Create New Folder** dialog box appears.

5 Type the name of the new folder and then click on the **OK** button. The new folder is added inside the selected folder. When naming the new folder, you must use a name that does not already exist in the selected folder.

Copying and pasting a folder

You copy a folder so that you can paste it into another folder. When you copy a folder, you copy the folder and all of its contents, including contacts and sub-folders.

When you copy and paste a folder of contacts, each new copy of a contact is linked to its original. If you make a change to the copy, the original is also changed. (Refer to **Using the linked copy method** on page 200.)

For more information, refer to the following topics:

- **Copying and pasting a folder using the menu bar** on page 217

- **Copying and pasting a folder using the toolbar** on page 218

- **Copying and pasting a folder using the right mouse button** on page 219

Copying and pasting a folder using the menu bar

To paste a copy of a folder into another folder:

1 Click on the folder you want to copy.

2 Click on the **Edit** menu.

3 Click on the **Copy** menu item.

4 Open the folder you want to copy the folder into.
The contents of the folder appear in the List View box.

5 Click on the **Edit** menu.

6 Click on the **Paste** menu item.

Copying and pasting a folder using the toolbar

To paste a copy of a folder into another folder:

1 Click on the folder you want to copy.

2 Click on the Copy button on the toolbar (shown on the right).

3 Open the folder you want to copy the folder into. The contents of the folder appear in the List View box.

4 Click on the Paste button on the toolbar (shown on the right).

Copying and pasting a folder using the right mouse button

To paste a copy of a folder into another folder:

1 Right-click on the folder you want to copy. The folder must be in the List View box.

2 Click on the **Copy** menu item.

3 Open the folder you want to copy into. The contents of the folder appears in the List View box.

4 Right-click on an open area in the folder.

5 Click on the **Paste** menu item.

Moving a folder

Folders can be moved from one enclosing folder to another. When you move a folder, all of the contacts and folders it contains move with it.

For more information, refer to the following topics:

- **Moving a folder using the menu bar** on page 221

- **Moving a folder using the toolbar** on page 222

- **Moving a folder using drag and drop** on page 223

- **Moving a folder using the right mouse button** on page 224

Moving a folder using the menu bar

To move a folder:

1 Click on the folder you want to move.

2 Click on the **Edit** menu.

3 Click on the **Cut** menu item. The folder dims.

4 Open the destination folder. The contents of the folder appear in the List View box.

5 Click on the **Edit** menu.

6 Click on the **Paste** menu item.

Moving a folder using the toolbar

To move a folder:

1 Click on the folder you want to move.

2 Click on the Cut button on the toolbar (shown on the right). The folder dims.

3 Open the destination folder. The contents of the folder appear in the List View box.

4 Click on the Paste button on the toolbar (shown on the right).

Moving a folder using drag and drop

To move a folder using drag and drop, both the folder you are moving and the folder you are moving it to must be visible in the Address Book.

To move a folder:

1 Drag the folder you want to move to the new destination folder.

Moving a folder using the right mouse button

To move a folder:

1. Right-click on the folder you want to move. The folder must be in the List View box.

2. Click on the **Cut** menu item. The folder dims.

3. Open the destination folder. The contents of the folder appear in the List View box.

4. Right-click on an open area in the folder.

5. Click on the **Paste** menu item.

Renaming a folder

Using the menu bar:

1 Click on the folder you want to rename.

2 Click on the **File** menu.

3 Click on the **Properties** menu item. The **Folder Property** dialog box appears.

4 Type the new name of the folder.

5 Click on the **OK** button.

Using the right mouse button:

1 Right-click on the folder you want to rename.

2 Click on the **Properties** menu item. The **Folder Property** dialog box appears.

3 Type the new name of the folder.

4 Click on the **OK** button.

Using the toolbar:

1 Click on the folder you want to rename.

2 Click on the Properties button on the toolbar (shown on the right - this button is black). The **Folder Property** dialog box appears.

3 Type the new name of the folder.

4 Click on the **OK** button.

Deleting a folder

When you delete a folder, all the contacts and folders it contains are also deleted.

Note: You can restore a deleted folder if you select **Undo** from the **Edit** menu immediately after you delete the contact.

Using the menu bar:

1 Click on the folder you want to delete.

2 Click on the **Edit** menu.

3 Click on the **Delete** menu item.

4 Click on the **OK** button to confirm deleting the folder and its contents.

Using the right mouse button:

1 Right-click on the folder you want to delete.

2 Click on the **Delete** menu item.

3 Click on the **OK** button to confirm deleting the folder and its contents.

Using the keyboard:

1 Click on the folder you want to delete.

2 Press the Delete key on the keyboard.

3 Click on the **OK** button to confirm deleting the folder and its contents.

Looking up contacts

It's easy to find your contacts whether they are saved in the telephone Directory or in the Address Book in Personal Call Manager.

For more information, refer to one of the following topics.

Making, answering and holding calls

You can use either the 9617 telephone or Personal Call Manager to make, answer and hold calls.

For more information, refer to the following topics:

Making calls

You can make a call using the telephone or Personal Call Manager.

For more information, refer to the following topics:

■ **Making a call using the telephone** on page 230

■ **Making a call using Personal Call Manager** on page 241

■ **Handsfree calls** on page 261

Making a call using the telephone

There are several ways to make a telephone call using the 9617 telephone.

For more information, refer to the following topics:

Dialing a call

You can use the 9617 to simply dial a regular call, or you can predial a telephone number to ensure it is correct before it is dialed out.

To dial a call:

1 Lift the handset or press [Handsfree **Mute**], [*Dial*] or [*Line x*].

2 Enter the number using the dialpad.

To predial a call, the Live Dialpad option must be off. For more information, refer to **Selecting the dialpad option** on page 239.

To predial a call:

1 Enter the number using the dialpad. Check the display to ensure you entered the number correctly.

2 Lift the handset or press [Handsfree **Mute**], [*Dial*] or [*Line x*].
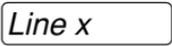
When you use [Handsfree **Mute**], [*Dial*] or lift the handset rather than using a line key to make a call, the prime line is automatically selected. The default prime line is Line 1. If you want to change the prime line to Line 2, refer to **Changing the prime line** on page 240.

Making a second call on your other line

You may want to make a call on your other line without hanging up your first call.

To make a call on your other line:

1 Press the other line key. The original line is put on hold.

2 Dial the telephone number.

Switching between callers

To switch to the caller that is on hold, press the appropriate Line key (*Line x*) for that caller. The other caller is automatically put on hold.

For more information, refer to **Answering a call on the other line** on page 265.

Using the telephone Directory to make a call

To make a call from the Directory, the Directory must contain contacts. For information on storing contacts into the Directory, refer to **The telephone Directory** on page 139.

To dial a number using the Directory:

1 Press `Directory`.

2 Press `↓` or `↑` or use the dialpad to find the item you want to dial out. Refer to **Finding a contact in the telephone Directory** on page 234.

3 Lift the handset or press `Handsfree Mute`, `Dial`, or `Line x`.

To end the call, press `Rls` or hang up.

Note: To leave the Directory at any time, press `Directory`.

Finding a contact in the telephone Directory

To scroll through the Directory:

1. Press [*Directory*].
2. To move up and down the list, press [↓] or
   [↑]. If you want to scroll steadily, press and
   hold [↓] or [↑].

To find contacts beginning with a particular letter:

1. Press [*Directory*].
2. Press the dialpad key with the letter you're looking for
   printed on it, then press [↓]. (For example, to
   see the contacts starting with "J", press [5], then press
   [↓] to scroll through the J listings. Refer to the
   letter chart shown under **Entering Names** on
   page 153.

To go directly to a particular contact:

1. Press [*Directory*].
2. Spell out the contact's name using the dialpad. As you
   enter the letters of the name, the telephone narrows
   down the number of contacts that match the letters
   you enter until only the name you have entered
   remains. Press [↓] at any time to view all the
   contacts that match the characters you entered. For
   example, to find "Steve", press [7] [8] [3] [8] [3].

Note: To leave the Directory at any time, press
[*Directory*].

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Using a memory key to make a call

Once you store a contact in a memory key, you can use that memory key to make a call. For more information on storing contacts in memory keys, refer to **Adding a contact to a memory key using the telephone** on page 147.

To call from a memory key:

1 Lift the handset or press $\boxed{\substack{\text{Handsfree} \\ \text{Mute}}}$, $\boxed{\textit{Line x}}$ or $\boxed{\textit{Dial}}$.
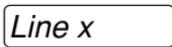
2 Press the memory key with the number you want to dial out.

Note: If the Live Dialpad option is turned on, you do not have to lift the handset or press any other button. Pressing the memory key automatically dials the number and puts the telephone in Handsfree mode.

To predial a call, the Live Dialpad option must be off. For more information, refer to **Selecting the dialpad option** on page 239.

To predial from a memory key:

1 Press the memory key with the number you want to dial out.

2 Lift the handset or press $\boxed{\textit{Dial}}$, $\boxed{\substack{\text{Handsfree} \\ \text{Mute}}}$, or $\boxed{\textit{Line x}}$.

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Using the Callers List to return a call

You must subscribe to Caller ID from your telephone
company to make calls from the Callers List. Contact your
local telephone company to subscribe to this service. For
more information on the Callers List, refer to **The Callers
List** on page 335.

To dial a number in the Callers List:

1 Press $\boxed{Callers}$.
2 Press $\boxed{Line\ x}$. This step is not necessary if the Call-
   ers List Mode is set to the **Combined** option. For more
   information about the Callers List Mode, refer to **Set-
   ting the Callers List mode** on page 338.
3 Use $\boxed{\downarrow \quad \uparrow}$ to find the contact you want to dial
   out.
4 Lift the handset or press $\boxed{\substack{\text{Handsfree} \\ \text{Mute}}}$, $\boxed{Dial}$, or
   $\boxed{Line\ x}$.
5 To end the call, press $\boxed{Rls}$ or hang up.

If you have trouble making a call from the Callers List, you
may have to edit the number (for example, the number
may be long distance and you may have to add "1"
before the number). Refer to **Editing in the Callers List**
on page 341 for more information.

You may also have to strip area codes from local numbers
to make local calls using the Callers List. For more
information, refer to **Stripping area codes from
numbers in the telephone Callers List** on page 375.

Using the Redial List to make a call

The Redial List stores the last ten numbers you dialed. When you press $\boxed{Redial}$, the last number you called appears on the screen. You can then scroll through the list to view the other numbers.

Note: The 9617 telephone Redial List synchronizes with the Personal Call Manager **Calls** menu **Redial List**.

To make a call from the Redial List:

1 Press $\boxed{Redial}$. The telephone display shows the last number you dialed.

2 If you want to select a different redial number, find that number by pressing $\boxed{\downarrow \quad \uparrow}$.

3 When the number is displayed, lift the handset or press $\boxed{\substack{\text{Handsfree} \\ \text{Mute}}}$, $\boxed{Dial}$, or $\boxed{Line\ x}$.

Note that if you press $\boxed{Redial}$ when the Live Dialpad option is turned on, after lifting the handset or after pressing $\boxed{\substack{\text{Handsfree} \\ \text{Mute}}}$, $\boxed{Dial}$, or $\boxed{Line\ x}$, your telephone automatically dials the last number in the Redial List without first displaying it.

For more information, refer to **Deleting the Redial List** on page 347.

Using a headset

To use a headset instead of the handset receiver:

1 Disconnect the handset and attach the headset cord to the jack labeled ☎.

2 Turn on the headset mode.

To turn the headset mode on or off:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use [↓ | ↑] to scroll to option number 12, or press [1] [2].

4 Press [✱] to change the headset mode. (By default, the headset mode is turned off.)

Note: When the headset mode is enabled, the handset must remain in the cradle.

To answer a call:

Press [**Handsfree Mute**].

To make a call:

Press [*Line x*].
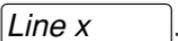
(You cannot use the Handsfree speakerphone when the headset mode is enabled.)

To end a call:

Press [*Rls*].

To return to using the handset, you must reconnect the handset and <u>disable the headset mode</u>.

Selecting the dialpad option

When you select the dialpad option, you are turning the Live Dialpad option on or off. When the Live Dialpad option is turned on, the telephone is in Live dial mode. When you dial, the telephone chooses the prime line and automatically dials in Handsfree mode as soon as you press a dialpad key or a memory key.

When Live Dialpad is off, the telephone is in pre-dial mode. This means that after you dial the telephone number, you must lift the handset or press `Dial`, `Line x`, or `Handsfree Mute` before the telephone number is dialed.

To select the dialpad mode using the 9617 telephone:

1   Press the Options key.

2   Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3   Use `↓` `↑` to scroll to option number 5 or press `0` `5`.

4   Press `✱` to change the dialpad mode.

5   Press `Rls`.

For information on how to select the dialpad mode using Personal Call Manager, refer to **The General tab** on page 95.

Changing the prime line

The prime line is the line that is automatically selected when you lift the handset or press [Handsfree Mute] or [Dial]. The default setting for prime line is Line 1. You can select either line as your prime line.

To change the prime line:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use [↓ | ↑] to scroll to option number 3 or press [0] [3]. The current prime line is displayed.

4 Press [✱] to change the prime line.

5 Press [Rls].

Making a call using Personal Call Manager

There are several ways to make a telephone call in Personal Call Manager (refer to the topics below).

When you make a call, the large Active Call icon (shown on the right) appears in the Calls box, and the small Active Call icon appears in the Personal Call Manager task tray menu, and **Calls** menu. (For more information on the icons that appear in the task tray menu and **Calls** menu, refer to **The task tray menu** on page 56.

Note: All calls made using Personal Call Manager are in Handsfree mode. Do not pick up the handset before making a call with Personal Call Manager. Pick up the handset only after the telephone number has been dialed (unless you are already on a call – in this case Personal Call Manager dials using the free line). For information on Handsfree, refer to **Handsfree calls** on page 261.

For more information, refer to the following topics:

- **Making a call using the Address Book** on page 242
- **Making a call using the task tray or Calls menu** on page 246
- **Making a call using the Memory Key dialog box** on page 253
- **Making a call using the Calls Log Window** on page 350
- **Finding a contact in the Address Book** on page 254

Making a call using the Address Book

The Address Book provides you the most flexibility for making calls. For example, it allows you to dial a contact's non-default telephone numbers.

Before you can call a contact using the Address Book, it must contain the contact's telephone number (see **Adding a new contact to the Address Book** on page 170).

When you make a call using the Address Book, the name in the Address Book appears in the Calls box.

When you manually dial a telephone number, Personal Call Manager compares the dialed number to the numbers stored in the Address Book. If a match is found, the name from the Address Book appears in the Calls box. If no match is found, the number dialed appears in the Calls box.

There are several ways to make a call using the Address Book. For more information, refer to the following topics:

- **Right-clicking to make a call** on page 243
- **Using the drag and drop method to dial a contact's default number** on page 244
- **Using the drag and drop method to dial a contact's non-default number** on page 245

Right-clicking to make a call

To make a call by right-clicking in the Address Book:

1 Find the icon of the person you want to call in the Address Book. You can use contacts in either the **My Contacts** folder or the **Quick Dials** folder.

2 Right-click on the icon.

3 Point to the **Dial** menu item. A submenu appears.

4 Click on the telephone number you want to dial for this person (i.e., the Business (or Business extension), Home or Mobile number).

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Using the drag and drop method to dial a contact's default number

You may have entered more than one telephone number for some of the contacts in the Address Book (for example, a business number and a home number). If so, you can define one of those numbers as a default number. The default number is set on the contact's **Address Properties** dialog box **Settings** tab. The Business number is selected by default. A default telephone number is the number that is dialed out automatically unless you specify otherwise. For more information, refer to **Adding a new contact to the Address Book** on page 170.

To dial the default telephone number:

1 Find the icon of the person you want to call in the Address Book. You can look either in the **My Contacts** folder or the **Quick Dials** folder.

2 Double-click on the icon or drag it to the Calls box.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Using the drag and drop method to dial a contact's non-default number

You may have entered more than one telephone number for some of the contacts in the Address Book. If so, you can define one of those numbers as a default number. A default telephone number is the number that is dialed out automatically unless you specify otherwise (i.e., specifically select a non-default number). For more information, refer to **Adding a new contact to the Address Book** on page 170.

To call a non-default telephone number using the drag and drop method:

1   Find the icon of the person you want to call in the Address Book. You can look either in the **My Contacts** folder or the **Quick Dials** folder.

2   Use the right mouse button to drag the icon into the Calls box. A menu appears.

3   Click on the telephone number you want to dial for this person (i.e., the Business (or Business Extension), Home or Mobile number).

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Making a call using the task tray or Calls menu

The task tray menu and the **Calls** menu are identical. You have four menu items to choose from when making a call using the task tray menu or **Calls** menu. You can use **Quick Dials**, **Redial List**, **Callers List** or **Manual Dial**.

For more information, refer to the following topics:

- **Returning a call using the Callers List in Personal Call Manager** on page 247
- **Redialing a call using the Redial List in Personal Call Manager** on page 248
- **Making a call using the Quick Dials menu item** on page 249
- **Dialing using the Dial dialog box** on page 250
- **The task tray icon** on page 55

Returning a call using the Callers List in Personal Call Manager

The **Callers List** contains a list of the last ten calls you received. Each call is identified by the name or telephone number sent by the telephone company (if you subscribe to Caller ID from your local telephone company), or by the name stored in the Address Book.

To make a call using the Callers List:

1   Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2   Point to the **Callers List** menu item. A submenu appears.

3   Click on the contact you want to call.

If you have trouble making a call from the Personal Call Manager Callers List, you may have to dial the number using the Callers List in the 9617 telephone instead. Refer to **Editing in the Callers List** on page 341 for more information.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

You can also return a call using the Calls Log window. For more information, refer to **Making a call using the Calls Log Window** on page 350.

Redialing a call using the Redial List in Personal Call Manager

The **Redial List** contains a list of the last ten calls you made. Each call is identified by telephone number, or if the contact you called is stored in the Directory, by the name you have stored there.

To make a call using the Redial List:

1   Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2   Point to the **Redial List** menu item. A submenu appears.

3   Click on the contact you want to call.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Making a call using the Quick Dials menu item

There are two ways to make a call using the **Quick Dials** menu item – you can use the task tray menu or the **Calls** menu.

You can choose a contact from the **Quick Dials** menu item. The **Quick Dials** menu item lists the contacts you have stored in the **Quick Dials** folder in the Address Book.

To make a call:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Point to the **Quick Dials** menu item.

3 Click on the contact you want to call.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Dialing using the Dial dialog box

To make a call using the Manual Dial menu item:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Click on the **Manual Dial** menu item. The **Dial** dialog box appears.

Dial						☒

Enter Phone Number or Name (Last Name, First Name)

			Find Now	Dial

Phone Number Type: | | Help | Cancel |

Name	Business Ph...	Extension	Home Phon...	Mobile Phon...	Fax Number	Ema
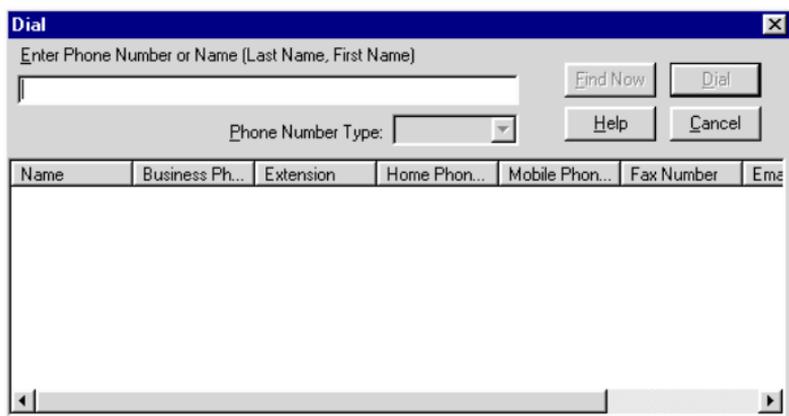
Tip: You can also open the **Dial** dialog box by pressing the **F3** key on your keyboard or by clicking on the Dial button on the toolbar (shown on the right.

3 Enter a telephone number in the text field in the upper left corner of the dialog box. (You can also search for a contact by name or number. For more information on searching, refer to **Making a call by searching for a contact using the Dial dialog box** on page 251.)

4 Click on the **Dial** button.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Making a call by searching for a contact using the Dial dialog box

You can search for a contact by name or number using the **Dial** dialog box. The search method differs depending on the Search Option you are using.

If you have the Search Option set to Fast Search, Personal Call Manager compares the name or number you enter in the **Call** field to the contacts stored in the Address Book as you enter it.

If you have the Search Option set to Slow Search, Personal Call Manager only searches for your contact when you click on the **Find Now** button. In either case, contacts that match your criteria appear in the bottom area of the dialog box.

To use the Dial dialog box:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Click on the **Manual Dial** menu item. The **Dial** dialog box appears. (You can also open the **Dial** dialog box by pressing the **F3** key.)

3 Enter the telephone number as it appears in the Address Book (e.g., +1 (403) 5551234...) or name (in the format: last name, first name) of the person you want to call in the upper left text field. If you are doing a Slow Search, click on the **Find Now** button when you want the search to begin. If you are doing a Fast search, matching contacts appear as you enter characters.

4 Click on the contact you want to call from the list of matches found.

5 If it is not grayed out, click on the **Phone Number** list box then click on Business, Home, Mobile or Extension to select the number you want to call.

6 Click on the **Dial** button.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

For more information, refer to the following topics:

- **Search preferences** on page 128
- **Searching based on a contact's first or last name** on page 259
- **Searching using wildcard characters** on page 260

Making a call using the Memory Key dialog box

You can call contacts assigned to Memory Keys using the **Memory Key** dialog box.

To make a call using the Memory Key dialog box:

1   Click on the 9617 Options menu.

2   Click on the **Memory Key** menu item. The **Memory Key** dialog box appears.

> **Tip**: You can also open the **Memory Key** dialog box by clicking on the Memory Key button on the toolbar (shown on the right.)

3   Click on the contact you want to call.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Finding a contact in the Address Book

The Address Book has a search feature to help you find a contact. You can search for a contact using the contact's name or telephone number.

The Search feature operates in two different modes, Slow and Fast.

In Slow Search mode, you enter the characters you want to find and then click on the **Find Now** button. Personal Call Manager only begins searching after you have clicked on the **Find Now** button. For more information refer to **Slow Search** on page 255.

In Fast Search mode, Personal Call Manager starts searching through the contacts as soon as you enter characters. For more information, refer to **Fast Search** on page 257.

To change the Search mode used, refer to **Search preferences** on page 128.

When entering search criteria, you usually search based on last name since names are stored in the format "Last Name, First Name." However, you can also search by the first name, or using wildcard characters. Refer to **Searching based on a contact's first or last name** on page 259 and **Searching using wildcard characters** on page 260 for more information.

Slow Search

Personal Call Manager performs a slow search if you have chosen the Slow Search option in the Search Preferences. Refer to **Search preferences** on page 128 for more information.

To find a contact:

1 Click on ![binoculars icon], or click on the **Tools** menu and then click on the **Find Person** menu item. The **Search** dialog box appears.

Search						⊠
Enter Phone Number or Name (Last Name, First Name)						
				Find Now	OK	
	Phone Number Type:		▼	Help	Cancel	
Name	Business Ph...	Extension	Home Phon...	Mobile Phon...	Fax Number	Ema
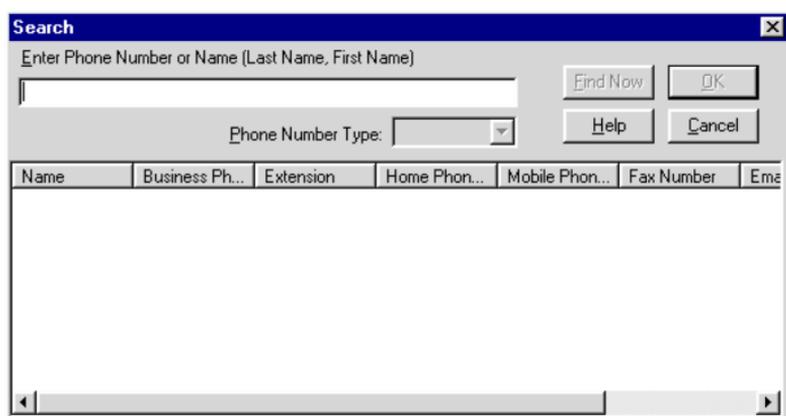
2 Enter the last name or telephone number of the contact you want to find exactly as it is in the Address Book (including the plus sign and brackets, e.g., " +1 (555) 5551234"). You can also search based on a contact's first name (refer to the topic listed below.)

3 Click the **Find Now** button. A list of the contacts that match the name or number you enter appears in the bottom of the **Search** dialog box.

4 Click on the name of the contact you want.

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5 Click on the **OK** button. The folder containing the contact opens and the selected contact is highlighted.

For more information, refer to the following topics:

- **Fast Search** on page 257
- **Searching based on a contact's first or last name** on page 259
- **Searching using wildcard characters** on page 260

Fast Search

Personal Call Manager does a fast search if you have chosen the Fast Search option in the Search Preferences. Refer to **Search preferences** on page 128 for more information.

To find a contact:

1 Click on ![binoculars icon], or click on the **Tools** menu and then click on the **Find Person** menu item. The **Search** dialog box appears.

Search						☒
Enter Phone Number or Name (Last Name, First Name)					Find Now	OK
		Phone Number Type:			Help	Cancel
Name	Business Ph...	Extension	Home Phon...	Mobile Phon...	Fax Number	Ema
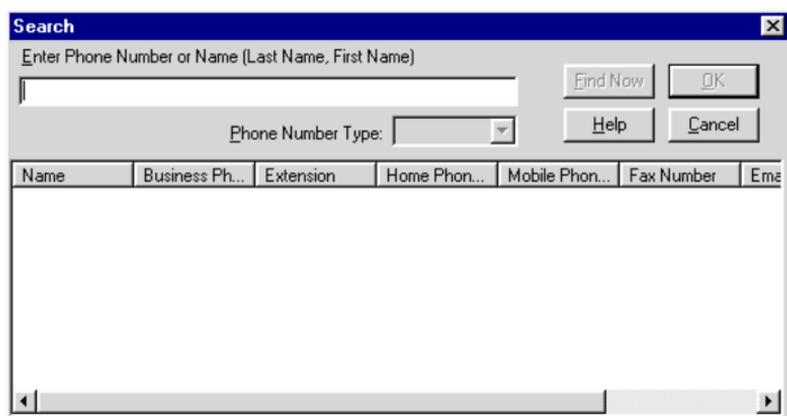
2 Enter the first character of the last name or telephone number of the contact you want to find exactly as it is in the Address Book (including the plus sign and brackets, e.g., " +1 (555)"). Personal Call Manager compares the letter or number you entered to the contacts stored in the Address Book. Any contacts that match the character you entered appear in the bottom area of the **Search** dialog box.

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If you have several contacts starting with that character, enter the next character in the name or telephone number. Personal Call Manager then displays only the contacts that match both of those characters.

3 Continue entering characters or use the scroll bar to find the contact in the **Search** dialog box.

4 Click on the name of the contact you want.

5 Click on the **OK** button. The folder containing the contact opens and the selected contact is highlighted.

For more information, refer to the following topics:

■ **Slow Search** on page 255

■ **Searching based on a contact's first or last name** on page 259

■ **Searching using wildcard characters** on page 260

Searching based on a contact's first or last name

There are times when you know only part of the name or telephone number of the contact you want to find. When this happens, you can enter the letters or digits you know and the Search feature will find all of the contacts that match the information you entered. You can then select the contact you were looking for from a list.

Names are stored in the format, "last name, first name". If you know the starting letter of the last name, simply enter it into the field below the "Enter Phone Number or Name (Last Name, First Name)" label. (If you are using the Slow Search option, click on the **Find Now** button.) Personal Call Manager finds all of the contacts that start with the letters or digits you entered.

If you only remember the contact's first name, enter a comma followed by the contact's first name. For example, if you are looking for a contact named Tom, enter ",Tom". All of the contacts whose first name is Tom appear.

Searching using wildcard characters

If the portion you know is not at the start of the first or last name, you can use "wild card" characters at the start of the name or number. There are two wild card characters you can use.

?	Use the question mark to represent any single character.
*	Use the asterisk to represent any characters that precede the characters you entered.

For example, the following names were added to the Address Book:

Chatterton, Jones, Mason, Smith, Stanley, Steward, Washington

- If you enter "S" the names that are found are Smith, Stanley and Steward.
- If you enter "Ste" the only name that is found is Stewart.
- If you enter "?a" the names that are found are Mason and Washington.
- If you enter "??a" the names that are found are Chatterton and Stanley.
- If you enter "*a" the names that are found Chatterton, Mason, Stanley, Steward, and Washington.

Handsfree calls

You can use the Handsfree speaker instead of the handset to make or answer a call. You can also switch to Handsfree while a call is in progress.

To make a Handsfree call:
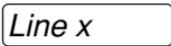
1. Press [Handsfree Mute] or [*Line x*].
2. Enter the number using the dialpad.

When the call is over, press [*Rls*].

To answer a call in Handsfree mode, press [Handsfree Mute] or the applicable line key ([*Line x*]).
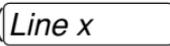
To switch to Handsfree mode when you are on a call, press [Handsfree Mute] and return the handset to the handset cradle (i.e., hang up the handset).

To turn off the Handsfree speaker, lift the handset.

All calls you make or answer using Personal Call Manager are automatically in Handsfree mode.

You can use a headset instead of using the handset or the Handsfree speaker. For more information, refer to **Using a headset** on page 238.

For more information, refer to **Muting a Handsfree call** on page 262.

Muting a Handsfree call

You can turn off the Handsfree microphone when you are in Handsfree mode so that the caller can't hear you but you can still hear the caller. Muting a call only works when you are in Handsfree mode.

To mute a Handsfree call:

1 Press $\boxed{\text{Handsfree Mute}}$. The light beside $\boxed{\text{Handsfree Mute}}$ flashes and the telephone display shows **Microphone muted**. You can hear your caller but your caller cannot hear you.

2 To speak to your caller, press $\boxed{\text{Handsfree Mute}}$ again. Each time you press $\boxed{\text{Handsfree Mute}}$, you turn the microphone on or off.

For more information, refer to **Handsfree calls** on page 261.

Answering calls

You can answer a call using either the 9617 telephone or Personal Call Manager.

For more information, refer to the following topics:

- **Answering a call using your telephone** on page 264

- **Answering a call using Personal Call Manager** on page 271

- **Handsfree calls** on page 261

Answering a call using your telephone

Caller ID information is sent from the telephone company to your 9617 telephone between the first and second ring (if you subscribe to the Caller ID service from your telephone company).

If you want the name and number of the incoming call to appear on the display and in the Callers List, answer the telephone after the second ring.

There are several ways to answer a call using the 9617 telephone depending on the type of call.

To answer a telephone call:

1 Lift the handset, press $\boxed{\begin{array}{c}\text{Handsfree}\\\text{Mute}\end{array}}$ or press the $\boxed{Line\ x}$ key for the line you want to answer.

If you lift the handset or press $\boxed{\begin{array}{c}\text{Handsfree}\\\text{Mute}\end{array}}$ when both lines are ringing, the line that is answered depends on the answer mode option you have chosen. To change which line is answered first, refer to **Selecting the answer mode** on page 270.

For more information, refer to the following topics:

- ■ **Answering a call on the other line** on page 265
- ■ **Answering a Call Waiting call using the tele-phone** on page 266
- ■ **Selecting the answer mode** on page 270

Answering a call on the other line

If you are on one telephone line and a call comes in on the other line, the following will happen:

- you will hear the telephone ring
- the line indicator light will flash beside the line that is ringing
- an arrow (–») will appear on the telephone display

To see the Caller ID of the incoming call, press $\boxed{\quad\quad \rightarrow}$.

To answer the call, press the line key of the line that is ringing (the current call is put on hold).

For more information, refer to the following topics:

- **Answering a call using your telephone** on page 264
- **Answering a Call Waiting call using the telephone** on page 266

Answering a Call Waiting call using the telephone

The 9617 telephone can display Call Waiting ID for Call Waiting calls. (You must subscribe to your telephone company for the Call Waiting ID service.)

Note: The Call Waiting ID option must be turned on for Call Waiting ID information to appear on the telephone display. This option is enabled by default. For more information, refer to **Choosing the Call Waiting ID option** on page 268.

When you receive a Call Waiting call:

- ■ you hear the Call Waiting beep, and
- ■ Call Waiting ID appears as shown below (if you subscribe to your telephone company to the Call Waiting ID service).

Original caller's identification is displayed.

CALLER ONE
555-1234

When you hear the Call Waiting tone, the Call Waiting caller's identification is displayed

CALLER TWO
555-5678

To speak to the Call Waiting caller:

- Press `Link`. (Your first call will not be disconnected.)

To switch between callers:

- Press `Link`. (You may switch between callers as often as you want.)

Note: When you press `Link` and see a caller's Identification information but only hear a dial tone, it means that the caller has hung up.

If you decide not to answer the Call Waiting call, the caller's ID is stored in the Callers List.

Call Waiting and Personal Call Manager

In Personal Call Manager, Call Waiting calls appear the same as normal calls. You answer them both the same way. For more information, refer to **Answering a call using Personal Call Manager** on page 271.

Note: After you answer a Call Waiting call, you will see two calls in the Calls box, one for the original call, and one for the Call Waiting call. When you are finished talking to one caller, simply select the other caller by double-clicking on his/her icon. Do not try to release the caller you are finished with. If you right-click on either call icon and choose the **Release** menu item, both callers disappear.

For more information, refer to the following topics:

- **Answering a call using your telephone** on page 264
- **Answering a call on the other line** on page 265

Choosing the Call Waiting ID option

You use the Call Waiting ID option to turn the display of Call Waiting ID on or off. You choose the Call Waiting Option for Line 1 and Line 2 independently.

When Call Waiting ID is on

When you receive a Call Waiting call and the Call Waiting ID option is on, you'll see the name and number of the Call Waiting caller on the telephone display and in Personal Call Manager. (In Personal Call Manager, Call Waiting callers appear in the Calls box the same way regular calls do.)

Note: You will not receive Call Waiting ID when an extension telephone (another telephone in your house or business) is using the same telephone line.

When Call Waiting ID is off

You can also choose to suppress the display of Call Waiting ID by turning the Call Waiting ID option off. When the Call Waiting display is turned off, you still hear the Call Waiting tone when a Call Waiting call comes in, but the identification information for the Call Waiting caller does not appear on your telephone display screen.

Note: Turning the Call Waiting ID option on or off does not turn the Call Waiting feature itself on or off. It only determines whether Call Waiting ID information appears on the telephone display. To unsubscribe from the Call Waiting feature, contact your telephone company.

To turn the display of Call Waiting ID on or off using the telephone:

1. Press the Options key.

2. Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3. Use ⌄ ⌃ to scroll to option number 8 or press 0 8.

4. Press ✱.

5. Press *Line x*.

6. Press ✱ to turn Call Waiting ID on, or press # to turn it off.

7. Press *Rls*.

You can also turn the display of Call Waiting ID on or off using Personal Call Manager. For more information, refer to **The Line tab** on page 93.

Disabling the Call Waiting feature for a single call

To disable the Call Waiting feature temporarily before making a call, contact your telephone company to obtain the code that must be dialed. You can specify this code in the **Dialing Properties** dialog box. Refer to **The Dialing Properties dialog box** on page 126 for more information.

Selecting the answer mode

When you select the answer mode, you are choosing which line will be answered when both lines are ringing and you lift the handset or press [Handsfree Mute].

Select **Answr Prime** (default setting), if you want the telephone to automatically answer the prime line first when both lines are ringing and you lift the handset or press [Handsfree Mute]. Refer to **Changing the prime line** on page 240 for information on how to choose which line is the prime line.

Select **Answr longest**, if you want the telephone to automatically answer the line that began ringing first when both lines are ringing and you lift the handset or press [Handsfree Mute].

To select the answer mode:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use [↓ | ↑] to scroll to option number 11 or press [1] [1].

4 Press [✱] to change the answer mode.

5 Press [#] to choose to answer the Prime line, or [✱] to choose to answer the longest ringing line. A checkmark indicates the current selection.

6 Press [Rls].

Answering a call using Personal Call Manager

Personal Call Manager simplifies multiline interactions. It treats Call Waiting callers as if they had their own line, and allows you to answer them without pressing *Hold* or *Link* on the telephone.

Note: Calls answered using Personal Call Manager are always in Handsfree mode.

For more information, refer to the following topics:

- **Caller ID and Personal Call Manager** on page 272
- **Answering a call using the You Have a New Call dialog box** on page 276
- **Displaying who is calling from the task tray** on page 274
- **Answering a call using the task tray or Calls menu** on page 283
- **Handsfree calls** on page 261

Caller ID and Personal Call Manager

When someone calls you, the **You Have a New Call** dialog box appears at the bottom right of your computer screen, and one of the Ringing icons (shown on the right) appears in the Calls box, the Personal Call Manager task tray menu and the Calls menu. (See **Answering a call using the You Have a New Call dialog box** on page 276.)

When you make or receive a call, an icon appears in the Calls box, **Calls** menu, and Personal Call Manager task tray menu. You may also see the name of the contact, hear an audible Call Announcement, or see a picture of the contact.

- **Caller ID and name match** on page 273
- **Call Announcements that tell you who is call-ing** on page 180.
- **Using graphics to identify callers** on page 184.

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Caller ID and name match

If you subscribe to a Caller ID service, Personal Call Manager compares the number it receives from the telephone company with the numbers stored in the Address Book when you receive a call.

What appears

- beside the call icon
- in the **You Have a New Call** dialog box, and
- on the telephone display

depends on whether a number match is found.

When a match is found - Address Book name matching

The name matching feature allows you to identify your contacts with a name or nick name you prefer, rather than with the name provided by the telephone company. If a match is found, the name from the Address Book appears.

Note: If you want name matching to work, do not enter dashes in the telephone numbers saved in your Address Book.

When a match is not found

If a match is not found, the name or number of the caller supplied by the telephone company appears.

If no Caller ID is available or you do not subscribe to the Caller ID service from your telephone company, then the word "Unknown" appears in Personal Call Manager. In this case, the telephone display only tells you which line is calling.

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Displaying who is calling from the task tray

When you click on the Personal Call Manager icon in the task tray, the current calls appear in the top half of the menu. (See **The task tray icon** on page 55.)

If you subscribe to the Caller ID and Call Waiting ID service, the name or number of the caller appears beside the icon. To perform a function on one of the current calls, point at the name or number of the caller and a menu appears.

If you point to a call in this menu, a submenu appears allowing you to control it (i.e., answer, hold or release it). For more information, refer to **The task tray menu** on page 56.

Answering a call from the main window

In Personal Call Manager, regular calls and Call Waiting calls appear the same in the Calls box. You also answer them both the same way. If you answer a call while you are on another call, the original call will be put on hold.

To answer a regular or Call Waiting call:

1 Double-click on the Ringing icon (both versions are shown on the right) in the **Calls** box. The call icon changes to the Active Call icon and the call is answered.

OR

1 Right-click on the Ringing icon in the **Calls** box.

2 Click on the **Answer** menu item.

Tip: If you right-click on a caller in the Calls box and then click on the **Properties** menu item, the **Address Properties** dialog box appears showing the **Note** tab if that caller is already stored in the Address Book. When the **Note** tab appears, you can click in the text area and begin typing notes. If the caller is not stored in the Address Book, you are given the option of adding the caller to the Address Book. For more information, refer to **Note** on page 188.

Note: After you answer a Call Waiting call, you will see two calls in the Calls box, one for the original call, and one for the Call Waiting call. When you are finished talking to one caller, simply select the other caller by double-clicking on his/her icon. Do not try to release the caller you are finished with. If you right-click on either call icon and choose the **Release** menu item, both callers will disappear.

Answering a call using the You Have a New Call dialog box

Personal Call Manager displays the **You Have a New Call** dialog box when you receive a call. This dialog box displays the available caller information. It also displays a picture if you have specified the location of one for that caller in the Directory. For more information, refer **Using graphics to identify callers** on page 184.

You Have a New Call:

	Name: Craig, Daniel
	Phone No: 555-5555
	Type:
	Dept: Customer Service
	Company: Nortel
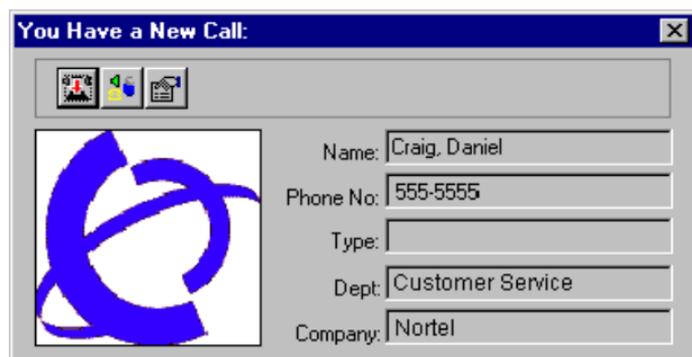
To answer a call using the **You Have a New Call** dialog box, click on the Answer button on the toolbar (shown on the right).

Note: The Close Window button (on the top right corner of the window) only closes the **You Have a New Call** dialog box, it does not hang up the call.

To view this dialog box after you have closed it:

1   Right-click on the icon of the call in the Calls box you want to see the dialog box for.

2   Click on the **Monitor** menu item.

Tip: If you right-click on a caller in the Calls box and then click on the **Properties** menu item, the **Address Properties** dialog box appears showing the **Note** tab if that caller is already stored in the Address Book. When the **Note** tab appears, you can click in the text area and begin typing notes. If the caller is not stored in the Address Book, you will be given the option of adding the caller (see **Note** on page 188).

For more information, refer to the following topics:

- **Using the You Have a New Call dialog box** on page 278
- **Caller ID and name match** on page 273

Using the You Have a New Call dialog box

The toolbar on this dialog box allows you to manage your telephone calls. Each toolbar button applies to the call displayed in the dialog box. To perform an action, click on its corresponding toolbar button.

To view this dialog box after you have closed it:

1 Right-click on the icon of the call you want to see the dialog box for.

2 Click on the **Monitor** menu item.

You Have A New Call toolbar buttons (page 1 of 2)

Button	Feature	Description
	Answer	Answers the incoming call.
	Release	Hangs up (releases) the telephone call.
	Hold	Puts the telephone call on hold.
	Unhold	Takes the held telephone call off hold.

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You Have A New Call toolbar buttons (page 2 of 2)

Button	Feature	Description
	Properties	Displays the **Address Properties** dialog box for the call. It allows you to add an entry for the caller to the Address Book, or modify an existing entry for the caller.

Switching calls using Personal Call Manager

Personal Call Manager can control four calls at once, two calls – one regular call and one Call Waiting call – on each line. In Personal Call Manager, there is no apparent difference between regular calls and Call Waiting calls. They are both handled the same.

Note: If you subscribe to your telephone company for the Three Way Calling service, you will be able to conference two regular callers on one line.

All current calls appear on the Personal Call Manager task tray menu, the **Calls** menu, and the main window. (See **The task tray icon** on page 55.)

Although four calls can be controlled, only one call can be active at any time, unless you have a conference call, in which case you can have two active calls. (Refer to **Conference calls** on page 291.)

When you answer a held call, the currently active call is automatically put on hold. This allows you to switch between held calls simply by answering the caller you want to talk to.

For more information, refer to the following topics:

- **Switching between calls on the main window** on page 281
- **Switching between calls using the task tray and Call menus** on page 282

Switching between calls on the main window

On the main window, the currently connected calls are shown in the Calls box. The currently active call shows the Active Call icon (shown on the right), while the rest of the calls show the Held Call icon.

To switch to a different call:

1 Double-click on the icon of the caller you want to talk to. The call you clicked on becomes the active call and the other call is put on hold.

OR

1 Right-click on the icon of the caller you want to talk to.

2 Click on the **UnHold** menu item. The call you clicked on becomes the active call and the other call is put on hold.

Switching between calls using the task tray and Call menus

On the Personal Call Manager task tray menu and the **Calls** menu, the currently connected calls appear at the top of the menu. The currently active call shows the Active Call icon (shown on the right), while the rest of the calls show the Held Call icon.

To switch to a different call:

1   Click on the task tray icon or **Calls** menu. (See **The task tray icon** on page 55.)

2   Point to the caller you want to talk to. A submenu appears.

3   Click on the **UnHold** menu item. The call you clicked on becomes the active call and the other call is put on hold.

Answering a call using the task tray or Calls menu

To answer a call:

1   Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2   Point to the call. A submenu appears.

3   Click on the **Answer** menu item.

Tip: If you right-click on a caller in the Calls box and then click on the **Properties** menu item, the **Address Properties** dialog box appears showing the **Note** tab if that caller is already stored in the Address Book. When the **Note** tab appears, you can click in the text area and begin typing notes. If the caller is not stored in the Address Book, you are given the option of adding the caller. For more information, refer to **Note** on page 188.

Holding and unholding calls

You can hold and unhold calls using either the telephone or Personal Call Manager.

For more information, refer to the following topics:

- **Putting a call on hold using your telephone** on page 285

- **Unholding a call using your telephone** on page 286

- **Putting a call on hold using Personal Call Manager** on page 287

- **Unholding a call using Personal Call Manager** on page 288

Putting a call on hold using your telephone

To put a call on hold:

1 Make or answer a call.

2 Press [*Hold*]. The telephone display shows that the call is on hold on line x and that line indicator light flashes.

3 Return the handset to the handset cradle (i.e., hang up the handset).

You won't lose the call if you hang up the handset.

Note: The 9617 automatically takes a held call off hold when a person on an extension telephone answers it. If you don't hang up the handset after you have put a call on hold and that call is picked up by someone at another extension, the call is taken off hold but remains connected to your telephone. If this happens, any background noise from your area will be heard by the caller and the person at the other extension.

Unholding a call using your telephone

To retrieve a held call:

1 Press `Line x`. If you don't retrieve the call within 15 minutes, the call is automatically dropped.

Note: The 9617 automatically takes a held call off hold when a person on an extension telephone answers it.

Putting a call on hold using Personal Call Manager

When a call is put on hold, the icon for the call changes from the Active Call icon to the Held Call icon. For information about the various icons, refer to **The task tray menu** on page 56 and **Current Calls icons** on page 69.

Using the main window:

1 Make or answer the call.

2 Right-click on the icon of the call in the **Calls** box. A menu appears.

3 Click on the **Hold** menu item.

Using the task tray or Calls menu:

1 Make or answer the call.

2 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

3 Point to the call you want to put on hold. A submenu appears.

4 Click on the **Hold** menu item.

Tip: You can also put a call on hold by clicking the Hold button on the toolbar (shown on the right) on the **You Have A New Call** dialog box.

For information on putting a conference call on hold, refer to **Putting a conference call on hold** on page 299.

Unholding a call using Personal Call Manager

To retrieve a held call using the main window:

1 Right-click on the icon of the call in the Calls box.

2 Click on the **UnHold** menu item.

To retrieve a held call using the task tray or Calls menu:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Point to the caller you want to talk to. A submenu appears.

3 Click on the **UnHold** menu item.

Tip: You can also double-click the call to take it off hold.

OR

You can take a call off hold by clicking the Unhold button on the toolbar (shown on the right) on the **You Have A New Call** dialog box.

For information on taking a conference call off hold, refer to **Taking a conference call off hold** on page 300.

Hanging up

Using the 9617 telephone

Press [Rls] or hang up the handset.

Using the main window in Personal Call Manager:

1 Right-click on the icon of the call in the **Calls** box. A menu appears

2 Click on the **Release** menu item.

Using the task tray or Calls menu in Personal Call Manager:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Point to the call you want to disconnect. A submenu appears.

3 Click on the **Release** menu item.

Using the keyboard and Personal Call Manager:

To hang up a call using the keyboard, the Personal Call Manager main window must be visible.

1 Click on the icon of the call in the **Calls** box. (Ensure a contact in the Address Book is not selected or it will be deleted when you do step 2.

2 Press the **Delete** key on your PC keyboard.

Note: If you accidently delete a contact (instead of a call), click on the **Edit** menu and then on the **Undo** menu item.

Tip: You can also hang up a call by clicking on the Release button (shown on the right) on the **You Have a New Call** dialog box toolbar, or on the Calls box toolbar.

When you have Call Waiting calls

If you receive a Call Waiting call, you will see two calls in the Calls box, one for the original call, and one for the Call Waiting call. When you are finished talking to one caller, simply select the other caller by double-clicking on his/her icon. Do not try to release the caller you are finished with. If you right-click on either call icon and choose the **Release** menu item, both callers disappear.

Conference calls

You can create a conference call using the 9617 telephone or Personal Call Manager.

When you subscribe to Three Way Calling from your telephone company, you can have conference calls with up to three other callers (refer to **Telephone network services you should subscribe to** on page 22).

For more information, refer to the following topics:

- **Making conference calls** on page 292
- **Making a Three Way Call** on page 297
- **Putting a conference call on hold** on page 299
- **Taking a conference call off hold** on page 300
- **Splitting a three-call conference call** on page 301
- **Hanging up conference calls** on page 304

Making conference calls

You can make two kinds of conference calls, a three-call conference (you plus two other callers) and a four-call conference (you plus three other callers).

When you make a three-call conference, you are connecting yourself with one caller on Line 1 and another caller on Line 2.

When you make a four-call conference, you are connecting yourself with two callers on one line, and one caller on the other line. To have two callers on one line, you must subscribe to the Three Way Calling service from your telephone company.

You can create either kind of conference using the 9617 telephone or using Personal Call Manager.

For details on the icons that appear in the Conference box, refer to **Current Calls icons** on page 69.

For more information, refer to the following topics:

- **Making a conference call using your telephone** on page 293

- **Making a conference call in Personal Call Manager** on page 295

Making a conference call using your telephone

A three-call conference

When you make a three-call conference, you are connecting yourself with one caller on Line 1 and another caller on Line 2.

To make a three call conference:

1 Make or answer a call on one line.
2 Make or answer a call on the second line.
3 Once you have callers on both lines, press Conference .

A four-call conference

When you make a four-call conference, you are connecting yourself with two callers on one line, and one caller on the other line. To have two callers on one line, you must subscribe to the Three Way Calling service from your telephone company.

To make a four-call conference:

1 Make a Three Way call on one line by following these steps:

   ■ Call one person on one line.

   ■ After that person answers, press the Link key.

   ■ Call another person by dialing their number and then press the Link key again. You now have a Three Way call.

2 Make a call on the other line.

3 Press the [Conference] key to conference the two lines together. You can now talk to all three callers at once.

Making a conference call in Personal Call Manager

A three-call conference

When you make a three-call conference, you connect yourself with one caller on Line 1 and another caller on Line 2.

To make a three-call conference:

1 Make or answer two calls you want to connect in a conference call.

2 Drag the icon of the first call from the Calls box to the Conference box.
OR
Right-click on the icon of the first call in the Calls box and then click on the **New Conf** menu item.

3 Drag the icon of the second call in the Calls box on top of the icon in the Conference box.
OR
Right-click on the icon of the second call in the Calls box and click on the **Conference** menu item. The icons for the two calls change to the Conference icons.

A four-call conference

When you make a four-call conference, you connect yourself with two callers on one line, and one caller on the other line. To have two callers on one line, you must subscribe to the Three Way Calling service from your telephone company. It does not matter what order you make the calls in.

To make a four-call conference:

1 First, make a Three Way call on one line by following these steps:

- Either drag a call icon from the Calls box to the Conference box, or if you don't have an active call, drag a contact from the Address Book to the Conference box.

- Drag another contact from the Address Book **on top of** the icon in the Conference box. You now have a Three Way call.

2 Make a call on the other line by dialing manually or dragging a contact from the Address Book into the Calls box. The call icon appears in the Calls box.

3 Right-click on the call in the Calls box.

4 Click on the **Add to Conf 1** menu item. The call icon moves to the Conference box and joins the conference.

Making a Three Way Call

Three Way Calling

When you subscribe to the Three Way Call service from your telephone company, you can create a telephone network conference call with two callers on one line of the 9617 telephone.

When attempting to make a Three-Way call, make sure you use the line that has the Three-Way call service.

Tip: You can conference a Three-Way call on one line with a call on your other line to create a four-call conference. For more information, refer to **Making conference calls** on page 292.

Using the 9617 telephone

1 Call one person on one line.

2 After that person answers, press the [*Link*] key.

3 Call another person by dialing their number and then press the [*Link*] key again. You now have a Three Way call.

Using Personal Call Manager

1 Either drag a call icon from the Calls box to the Conference box, or if you don't have an active call, drag a contact from the Address Book to the Conference box. Wait until the call is answered.

2 Drag another contact from the Address Book **on top of** the call icon in the Conference box. The **Add to Conference** dialog box appears.

Add to Conference ⊠

Has the called party answered?

If yes, click <u>O</u>K to complete the Three-way call

If no, click <u>D</u>rop to return to your first caller.

| <u>O</u>K | <u>D</u>rop |

3 When the contact answers, click on the **OK** button to complete the Three Way call.
Note: If the contact does not answer, click on the **Drop** button to cancel the Three Way call and return to your first call.

Putting a conference call on hold

You put any type or size of conference call on hold in the same way.

Using the 9617 telephone:

1 Press `Hold` on the 9617 telephone. The line indicator lights flash to indicate that the calls are on hold.

Using the main window in Personal Call Manager:

1 Right-click one of the calls in the Conference box. A menu appears.

2 Click on the **HoldConf** menu item. All calls are put on hold and the call icons change to Held Conference icons.

Using the task tray or Calls menu in Personal Call Manager:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Point to one of the calls in the conference. A submenu appears.

3 Click on the **HoldConf** menu item. All calls are put on hold and the call icons change to the Held Conference icons.

For more information, refer to **Taking a conference call off hold** on page 300.

Taking a conference call off hold

Using the 9617 telephone:

1   Press Conference.

Using the main window in Personal Call Manager:

1   Right-click one of the calls in the Conference box. A menu appears.

2   Click on the **UnHoldConf** menu item.

All calls in the conference become active and the icons change to the Conference icons.

Using the task tray or Calls menu in Personal Call Manager:

1   Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2   Point to one of the calls in the conference. A submenu appears.

3   Click on the **UnHoldConf** menu item.

All calls in the conference become active and the icons change to the Conference icons.

For more information, refer to **Putting a conference call on hold** on page 299.

Splitting a three-call conference call

When you split a three-call conference, one of the callers becomes the active call and the other caller is put on hold.

Using the 9617 telephone

1 Press the line key $\boxed{Line\ x}$ of the caller you want to speak to. The conference call is split and the other caller is put on hold.

Using Drag and Drop in Personal Call Manager:

1 Drag one of the icons out of the Conference box. The call whose icon you removed from the Conference box becomes active, and the other call moves to the Calls box and is put on hold.

Using the right mouse button in Personal Call Manager:

1 Right-click on the icon of the caller you want to speak to in the Conference box. A menu appears.

2 Click on the **Split Conf** menu item.The icons for both calls are moved to the Calls box.The caller you selected becomes the active call while the other caller is put on hold.

Using the task tray or Calls menu in Personal Call Manager:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Point to the icon of the caller you want to speak privately to. A submenu appears.

3 Click on the **Split Conf** menu item. The icons for both callers are moved to the Calls box. The caller you selected becomes the active call while the other caller is put on hold.

Splitting a four-call conference call

When you are on a four-call conference, one line has two callers and the other has just one caller. When you split a conference, the caller(s) on one line remain active so you can still talk to them, and the other caller(s) is (are) put on hold.

Using the 9617 telephone:

1 Press the line key of the caller(s) you want to speak privately to.

Using Personal Call Manager:

1 Drag the call icon of the single caller (the caller that is alone on one line) to the Calls box.

OR

1 Right-click on the single caller and click on the **Release from Conf** menu item. The single caller's icon moves to the Calls box and becomes active and the icon of the other callers changes to the held conference icon.

Hanging up conference calls

Using the 9617 telephone:

1 Press $\boxed{Rls}$.

Using the main window in Personal Call Manager:

1 Right-click on one of the icons in the Conference box. A menu appears.

2 Click on the **Release Conf** menu item. The conference is ended.

Using the task tray or Calls menu in Personal Call Manager:

1 Click on the Personal Call Manager task tray icon or **Calls** menu. (See **The task tray icon** on page 55.)

2 Point to the icon of one of the calls in the conference. A submenu appears.

3 Click on the **Release Conf** menu item. The conference is ended.

Tip: You can also click on the conference and use the Delete key on the computer keyboard to hang up a conference call, or the Release Conference Call button on the Conference box toolbar (shown on the right).

Advanced features

Sending your calls to your pager

The Pager feature sends the Caller ID of your calls to your Pager service, if you have one.

How it works once it is set up

When your telephone receives a call, it sends the telephone number of that call (supplied by Caller ID) to your pager. The telephone number will be proceeded by three zeros. You are paged even if the telephone call is answered by someone using an extension telephone or by an answering machine. (Note that if the call is answered using the 9617 telephone, the Caller ID won't be sent to your pager.)

Note: If the Caller ID of the caller is "unknown" or "private" (i.e., no telephone number is provided), only three zeros are sent to your pager.

Setting up the Pager feature

There are three steps to setting up the Pager feature:

1 Log all calls for the line you want to activate the Pager feature for in the Callers List. For more information, refer to **About the Callers List and the Pager feature** on page 337 or the "Callers Display" option under the topic, **The Line tab** on page 93.

2 Enter your Pager settings. For more information, refer to **Entering your Pager settings** on page 307.

3 Enable the Pager feature by turning on the **Enable Pager Notification** option (refer to **Enabling the Pager feature** on page 308). You can also enable the pager for certain contacts only (refer to **Pager Notification for Quick Dial and memory key contacts** on page 310).

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Entering your Pager settings

Note: Before following the steps on this page, make sure you have read **Sending your calls to your pager** on page 306.

To configure the Pager feature:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure** button. The **9617 Configuration Properties** dialog box appears.

4 Click on the **Feature** tab.

5 Enter your pager settings in the **Pager Notification Options** box. For more information on these options, refer to **Pager Notification Options** on page 104.

Enabling the Pager feature

By enabling the pager feature, you are specifying which incoming calls you want sent to your pager.

Note: Before following the steps on this page, make sure you have read **Sending your calls to your pager** on page 306.

Turning on the Enable Pager Notification option

You need to specify which calls you want sent to your pager. You can specify the incoming calls on Line 1, on Line 2, on both Line 1 and Line 2, or calls from certain contacts in memory keys or the Directory/**Quick Dials** folder.

To enable the Pager feature for a line:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure** button. The **9617 Configuration Properties** dialog box appears.

4 Click on the **Line** tab.

5 Select the Line you want to enable Pager notification for.

6 Select the **Enable Pager Notification** checkbox. A checkmark appears in the checkbox when it is selected. To enable Pager Notification for another line, repeat steps 5 and 6.

7 Click on the **OK** button.

Refer to **Pager Notification for Quick Dial and memory key contacts** on page 310 for instructions on how to enable the Pager feature for certain contacts.

Pager Notification for Quick Dial and memory key contacts

If you have disabled Pager notification on both lines, you can still have calls from specified contacts stored in your Directory/**Quick Dials** folder or memory keys sent to your pager.

To be paged by contacts in memory keys or the **Quick Dials** folder, you must set the Callers List in the telephone to the "All Calls" option for the line(s) you expect the calls to come in on. (If you are going to use this approach, it is recommended that you select the "All Calls" option for both lines 1 and 2.) For more information, refer to **Setting up the Callers List** on page 336.

Note: Before following the steps on this and the next page, refer to **Sending your calls to your pager** on page 306.

For your contacts stored in the Quick Dials folder:

1 Right-click a contact in the **Quick Dials** folder.

2 Point to the **9617 Options** menu item. A submenu appears.

3 Click on the **9617 Properties** menu item. The **9617 Property** dialog box appears.

4 Select the **Pager Notification** checkbox. A check-mark appears in the checkbox when it is selected.

5 Click on the **OK** button.

Tip: You can use the **Quick Dials Manager** to view and/ or change the Ring Configuration settings for all of your Quick Dials on one dialog box. For more information, refer to **Using the Quick Dial Manager** on page 331.

For contacts stored in memory keys:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the **Configure** button. The **9617 Configuration Properties** dialog box appears.

4 Click on the **Memory Keys Assignment** tab.

5 Select the contact you want to set Pager Notification for.

6 Click the **Configure** button.

7 Select the **Pager Notification** checkbox. A check-mark appears in the checkbox when it is selected.

8 Click on the **OK** button.

Screening your telephone calls

There are several ways to screen your calls. You can prevent your telephone from ringing for certain calls, or specify a special ring for certain calls so you can more easily identify them.

Regardless of the method you choose, it is highly recommended that you enable the Suppress First Ring option. For information about this option, refer to **About the Suppress First Ring option** on page 313.

For information on the ways you can screen your calls, choose a topic below.

- **Using a Special Ring to identify callers** on page 314
- **Blocking "Unknown" callers** on page 315
- **Blocking "Private" callers** on page 316
- **Blocking specified Quick Dial contacts** on page 317
- **Blocking specified Memory key contacts** on page 319
- **Accepting calls only from specified contacts** on page 320
- **Identifying long distance calls with a special ring** on page 321

About the Suppress First Ring option

It is recommended that you enable the **Suppress First Ring** option if you intend to screen your calls.

The call screening features of the 9617 telephone and Personal Call Manager require Caller Identification (Caller ID) information to work. However, Caller ID information isn't sent to your telephone until after the first ring.

When you enable the **Suppress First Ring** option, the 9617 telephone does not ring until it has received the Caller ID information. (While the telephone doesn't ring, the call light still flashes and the call information is displayed for a few moments before the phone rings).

For information on how to enable this option, refer to the "**General** tab" subtopic on **The M9617 Configuration Properties dialog box** on page 92.

Using a Special Ring to identify callers

You can assign a special ring tone to identify certain callers stored in the **Quick Dials** folder and in Memory keys.

For information on how to enable this option, refer to **About Ring Configuration settings for Quick Dials contacts** on page 161 and **Specifying Ring Configuration properties for contacts stored in memory keys** on page 155.

Blocking "Unknown" callers

Enabling the **Block Unknown Call** option blocks all calls that have a Caller ID of "unknown." A caller will be listed as "unknown" if the telephone company has no information for them. Blocked calls rings once, unless you have enabled the **Suppress First Ring** option.

For information on how to enable this option, refer to the "**General** tab" subtopic on **The M9617 Configuration Properties dialog box** on page 92.

Blocking "Private" callers

Callers can request that their ID be listed as "private" by the telephone company.

When you enable the **Block Private Call** option, Personal Call Manager blocks all calls that have a Caller ID of "private." Blocked calls ring once, unless you have enabled the **Suppress First Ring** option.

For information on how to enable this option, refer to the "**General** tab" subtopic on **The M9617 Configuration Properties dialog box** on page 92.

Blocking specified Quick Dial contacts

Calls may be blocked using the Personal Call Manager **Quick Dial Manager** window.

To block specified Quick Dial contacts:

1 Click on the **9617 Options** menu and click on the **Quick Dial Manager...** menu item.

OR

Click on the Quick Dial Manager button on the toolbar (shown on the right). The **Quick Dial Manager** appears.

2 Click on the contact you want to block.

3 Click on the **Edit** menu.

4 Click on the **Properties** menu item. The **9617 Property** dialog box appears.

5 Select the **Never Ring** option. (This option is selected when a check mark appears in the checkbox beside it.)

6 Click the **OK** button. Changes to contacts are reflected in the Quick Dial Manager window.

Tip: You can access the **9617 Property** dialog box in several other ways:

1 In the Personal Call Manager main window, right-click on the Quick Dial contact you want to change. A menu appears.

2 Click on **9617 Options** menu item.

3 Click on the **9617 Properties** menu item.

OR

1. Click on the Quick Dial contact you want to change.
2. Click on the **9617 Property Page** button on the toolbar (shown on the right).

Blocking specified Memory key contacts

Once you have saved a contact into a memory key, you can prevent the telephone from ringing when that contact calls. To see how to save a contact into a memory key, refer to **Memory keys and the M9617 telephone** on page 146.

To block calls from contacts stored in memory keys:

1   Click on the **Tools** menu.

2   Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3   Click on the drop list arrow beside the **TAPI Line** field.

4   Click on **9617**.

5   Click on the **Configure Line** button.

6   If required, type the Options List password.

7   Click on the **OK** button. The **9617 Configuration Properties** dialog box appears.

8   Click on the **Memory Keys Assignment** tab.

9   Click on the radio button that corresponds to the contact you want to block.

10 Click on the **Configure** button. The **Auto Dial** dialog box appears.

11 Select the **Never Ring** option.

12 Click on the **OK** button.

13 Click on the **Apply** button. The telephone won't ring when this contact calls.

For more information, refer to **The Don't Disturb feature** on page 322.

Accepting calls only from specified contacts

You can have the 9617 telephone ring only when certain contacts call. This method involves the Don't Disturb feature.

When you turn on the Don't Disturb feature, the 9617 telephone won't ring when you receive a call. However, you can override the Don't disturb feature for certain contacts you have stored in memory keys or in the Quick Dials folder in Personal Call Manager by using the **Always Ring** option.

To use this method, follow these steps:

1 Turn on the Don't Disturb feature (refer to **The Don't Disturb feature** on page 322).

2 Enable the Always Ring option for the contacts you want the telephone to ring for (refer to **Overriding DND for some contacts** on page 329).

Identifying long distance calls with a special ring

If you only want to accept long distance calls, you can program the 9617 telephone to sound a special ring whenever you receive a long distance call. (Long distance calls ring once normally before the special ring is activated unless the **Suppress First Ring** option has been enabled.)

To identify long distance calls with a special ring:

1 Click on the **Tools** menu.

2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.

3 Click on the drop list arrow beside the **TAPI Line** field.

4 Click on **9617**.

5 Click on the **Configure Line** button.

6 If required, type the Options List password.

7 Click on the **OK** button. The **9617 Configuration Properties** dialog box appears.

8 Click on the **General** tab.

9 Click on the radio button beside the **Special Ring for Long Distance** option.

10 Click on the **OK** button.

Note: The long distance icon (shown on the right) also appears on the 9617 telephone display to identify long distance calls.

The Don't Disturb feature

You can take advantage of the Don't Disturb feature to stop your 9617 telephone from ringing.

Although the telephone won't ring, you can still answer the call.

You can set this feature using either the 9617 telephone or Personal Call Manager.

For more information, refer to the following topics:

Don't Disturb and the 9617 telephone

You can suppress the ringing on your telephone by using the Don't Disturb (DND) feature. When this feature is on, the telephone does not ring; however, the line indicator and set indicator lights still flash when you receive a call. When this feature is on, **Don't disturb ON** appears on the telephone display.

Note: Although the telephone does not ring, you can still answer the call.

Overriding DND for some contacts

When you use the DND setting, it applies to all incoming calls. However, you can override the DND setting for contacts saved in Memory keys and in the **Quick Dials** folder (which is the same as your 9617 telephone Directory). For more information, refer to **Overriding DND for some contacts** on page 329.

To turn Don't Disturb on or off:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ↓ ↑ to scroll to option number 19 or press 1 9 . The telephone display tells you whether the feature is on or off.

4 Press ✱ to turn the feature on or off.

5 Press Rls.

You can also program the Don't Disturb key into a memory key so you can quickly turn it on and off, even while your telephone is ringing.

For more information, refer to the following topics:

- **Adding and using a Don't Disturb key** on page 325

- **Deleting the Don't Disturb key** on page 326

- **Turning DND on or off** on page 328

Adding and using a Don't Disturb key

You can program the Don't Disturb key into a memory key so you can quickly turn it on and off, even while your telephone is ringing.

To program a memory key as a Don't Disturb key:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ⎣ ↓ ⎤ ⎣ ↑ ⎤ to scroll to option number 21 or press ⎣2⎤ ⎣1⎤.

4 Press ⎣✱⎤.

5 Press the desired memory key.

6 Press ⎣Save⎤.

7 Label the memory key as a Don't Disturb key. Refer to **Labeling memory keys** on page 150.

8 Press ⎣Rls⎤.

Using the Don't Disturb key

To turn the Don't Disturb feature on or off, simply press the Don't Disturb memory key on the telephone. When the feature is on, `Don't disturb ON` appears on the telephone display.

Deleting the Don't Disturb key

To delete a Don't Disturb key, you must follow two steps. First reprogram the Don't Disturb key to be a memory key, then delete the memory key.

First, reprogram the key to be a memory key:

1 Press `Save`.

2 Press the memory key that contains the Don't Disturb feature.

3 Press `7` to begin re-programming the key as a memory key.

4 Press `Save` two times to skip the number and name prompts. The Don't Disturb key has been changed to a memory key.

Second, clear the contents of the memory key:

1 Press the memory key.

2 Press `Delete` twice.

Don't Disturb and Personal Call Manager

The Don't Disturb feature works the same whether you activate it with the 9617 telephone or with Personal Call Manager.

When DND is enabled, the telephone does not ring when someone calls, but the line indicator still flashes.

In Personal Call Manager, when you receive a call the **You Have a New Call** dialog box still appears and the Ringing icon appears in the Calls box.

When this option is enabled:

- the message "Don't disturb ON" appears on the display of the telephone
- the Don't Disturb icon (shown on the right) appears in the task tray on your computer
- "DND" appears on the Status Bar of Personal Call Manager

You can turn the Do Not Disturb (DND) feature on or off from the **Calls** menu or the Personal Call Manager task tray menu. (See **The task tray icon** on page 55.)

Overriding DND for some contacts

When you use the DND setting, it applies to all incoming calls. However, you can override the DND setting for contacts saved in Memory keys and in the **Quick Dials** folder (which contains the same contacts as your 9617 telephone Directory). For more information, refer to **Overriding DND for some contacts** on page 329.

Turning DND on or off

To turn Don't Disturb (DND) on or off:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Click on the **DND** menu item. A checkmark appears next to the menu item when DND is enabled.

Other ways to turn DND on or off

You can turn DND on and off using the **Feature** tab on the **9617 Configuration Properties** dialog box (see **The Feature tab** on page 101). You can also turn DND on and off using a DND memory key. For more information, refer to **Adding and using a Don't Disturb key** on page 325.

Overriding DND for some contacts

You can specify the contacts you want to override the Don't Disturb (DND) feature. When one of these contacts calls, the telephone rings even if DND is turned on.

Contacts stored in memory keys

To specify that a contact's call override DND:

1 Click on the **Tools** menu.
2 Click on the **Dial Using** menu item. The **Choose a TAPI Line** dialog box appears.
3 Click on the **Configure** button. The **9617 Configuration Properties** dialog box appears.
4 Click on the **Memory Keys Assignment** tab.
5 Click on the memory key that stores the contact you want to override DND.
6 Click the **Configure** button.
7 Select the **Always Ring** check box.
8 Click the **OK** button on each dialog box until they are gone.

Contacts stored in the Quick Dials folder

To specify that a contact's call override DND:

1 Right-click on a contact in the **Quick Dials** folder.
2 Point to the **9617 Options** menu item. A submenu appears.
3 Click on the **9617 Properties** menu item. The **9617 Property** dialog box appears showing the **Ring Configuration** tab.

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4 Select the **Always Ring** check box.

5 Click on the **OK** button.

Tip: You can also specify that a Quick Dial contact override DND using the **Quick Dial Manager** window. This window also allows you to quickly review the ring configuration of all of your Quick Dials at once. For more information, refer to **Using the Quick Dial Manager** on page 331.

Using the Quick Dial Manager

You can use the **Quick Dials Manager** to view and/or change the Ring Configuration settings for all of your Quick Dials on one dialog box.

You can set the **Always Ring**, **Never Ring**, **Special Ring** or **Pager Notification** options.

To set Ring Configuration settings for contacts stored in the **Quick Dials** folder:

1 Click on the **9617 Options** menu.

2 Click on the **Quick Dial Manager** menu item. The **Quick Dials Manager** appears.

Name	Phone Number	Always Ring	Never Ring	Special Ring	Pag ▲
Annable Wayne	+1 (555) 5555555	NO	NO	NO	NO
Avis Andrew	+1 (555) 5555555	YES	NO	NO	NO
Basil Mike	+1 (555) 5555555	NO	NO	NO	NO
Betinol Jocelyn	+1 (555) 5555555	NO	NO	NO	NO
Bhatia Rohit	+1 (555) 5555555	NO	NO	YES	NO
Boland Brad	+1 (555) 5555555	NO	NO	NO	NO
Bradford Kirk	+1 (555) 5555555	NO	NO	NO	NO
Bruce Sam	+1 (555) 5555555	YES	NO	NO	NO
Bryson Mike	+1 (555) 5555555	NO	NO	NO	NO
Calgary Herald T	+1 (555) 5555555	NO	NO	NO	NO
Castonguay France	+1 (555) 5555555	NO	NO	NO	NO

3 Click on a contact
OR
Select several contacts by Ctrl-clicking on them.
OR
Select a range of contacts by clicking on the first contact in the range and shift-clicking on the last contact in the range.

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4 Click on the **Edit** menu and click on the **Properties** menu item.
OR
Click on the Quick Dial Manager button on the toolbar (shown on the right). The **9617 Property** dialog box appears showing the **Ring Configuration** tab.

5 Select the options you want. An option is selected when a check mark appears in the check box. For information on the options available, refer to **About Ring Configuration settings for Quick Dials contacts** on page 161.
Note: If you have selected several contacts, some settings may appear greyed out in the Properties dialog box. This greying out occurs because the settings are not the same for all contacts. To turn the setting on for all the selected contacts, click once. To turn the setting off for all the selected contacts, click again.

6 Click the **OK** button.

For more information, refer to **The Quick Dials folder** on page 160.

Using Calls Logs and lists

Both Personal Call Manager and the 9617 telephone have Calls Logs which store phone numbers and allow you to easily return calls and redial numbers.

Personal Call Manager also contains a Calls Log Window which logs complete records of your incoming and outgoing calls.

For more information, refer to the following topics:

- **The Callers and Redial Lists in your M9617 telephone** on page 334

- **Calls Logs and lists in Personal Call Manager** on page 348

The Callers and Redial Lists in your 9617 telephone

The 9617 telephone features two lists to keep track of your calls. The Callers List logs your incoming calls, and the Redial list logs the calls you have made.

For more information, refer to the following topics:

The Callers List

The 9617 stores up to 100 calls in the Callers List. Your telephone logs the number (and name if available) of the caller and when he or she called. (You must subscribe to your telephone company for the Caller ID service.)

If the telephone number of the incoming call matches a number that you have saved in a memory key or the Directory, the Callers List shows the name you have saved in the memory key or Directory instead of the name sent with the Caller ID.

You can choose to record all of your incoming calls, only unanswered calls, or no calls in the Callers List. Setting the Callers List to record no calls turns the Callers List off.

Note: The 9617 telephone Callers List also appears in the Personal Call Manager **Calls** menu.

For more information, refer to the following topics:

■ **Setting up the Callers List** on page 336

■ **About the Callers List and the Pager feature** on page 337

■ **Setting the Callers List mode** on page 338

■ **Callers List telephone display messages** on page 44

Setting up the Callers List

The Callers List records up to 100 incoming calls. You can program the telephone to record unanswered calls, all incoming calls, or no calls.

To change the Callers List:

1   Press the Options key.

2   Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3   Use $\boxed{\quad \downarrow \quad}$ to scroll to option number 7 or press $\boxed{0}$ $\boxed{7}$.

4   Press $\boxed{*}$ to change the Callers List.

5   Press $\boxed{Line\ x}$.

6   Press $\boxed{\quad \downarrow \quad}$ until you see the option you want (Unanswered, All calls, or No calls). The current option is indicated with a check mark.

   Unanswered **– Records only your unanswered calls**

   All calls **– Records all calls**

   No calls **– Records no calls**

7   Press $\boxed{*}$ to select the option.

8   After two seconds, repeat steps 4 to 7 to set the callers list for the other line.

9   Press $\boxed{Rls}$.

For more information, refer to **About the Callers List and the Pager feature** on page 337 and **Setting the Callers List mode** on page 338.

About the Callers List and the Pager feature

If you are going to use the Pager feature, you must log all calls for the telephone line you want to activate the Pager feature on.

If you have enabled the Pager feature on Line 1, select the "All Calls" option for Line 1.

If you have enabled the Pager feature on Line 2, select the "All Calls" option for Line 2.

If you have enabled the Pager feature on Line 1 and Line 2, select the "All Calls" option for both Line 1 and Line 2.

If you want the Pager feature to work for contacts stored in memory keys or the **Quick Dials** folder even if you have disabled the Pager feature on both lines, select the "All Calls" option for the line(s) you expect the calls from these contacts to come in on. (If you are going to use this approach, it is recommended that you select the "All Calls" option for both lines.)

For more information, refer to **Setting up the Callers List** on page 336.

Setting the Callers List mode

You can program the Callers List to be split by line or combined. If the Callers List is combined, it contains all of the calls for both lines combined (100 item maximum). If the Callers List is split by line, there is a separate list for each line.

The total number of calls in the two Callers Lists cannot exceed 100. The Callers List for one line can exceed 50 calls, as long as the list for the other line has less than 50 calls.

To set the Callers List mode:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use [↓ | ↑] to scroll to option number 9 or press [0] [9].

4 Press [✱] .

5 Press [✱] if you want to see the calls for both lines at the same time. Press [#] if you want to see the calls for each line separately. A checkmark indicates the current selection.

6 Press [Rls].

You can also change the Callers List mode using the General tab on the **9617 Configuration Properties** dialog box in Personal Call Manager. For more information, refer to **The General tab** on page 95.

Finding an item in the Callers List

To find items in the Callers List:

1 To see the Callers List heading, press [*Callers*].

2 Press [*Line x*]. This step is not necessary if the Callers List Mode is set to the "Combined" option. For more information about the Callers List Mode, refer to **Setting the Callers List mode** on page 338.

3 To see the first caller in the list, press [↓]. To move down and up the list, press [↓ ↑]. If you want to scroll steadily, press and hold [↓ ↑].

Tip: To see the last caller you viewed when you were last in the Callers List, press [✱] after you press [*Callers*].

4 To leave the Callers List at any time, press [*Callers*].

Making calls from the Callers List

You must subscribe to Caller ID from your telephone company to make calls from the Callers List. Contact your local telephone company to subscribe to this service. For more information on the Callers List, refer to **The Callers List** on page 335.

To dial a number in the Callers List:

1   Press $\boxed{\textit{Callers}}$.
2   Press $\boxed{\textit{Line x}}$. This step is not necessary if the Callers List Mode is set to the "Combined" option. For more information about the Callers List Mode, refer to **Setting the Callers List mode** on page 338.
3   Find the contact/number you want call.
4   Lift the handset or press $\boxed{\substack{\text{Handsfree}\\\text{Mute}}}$, $\boxed{\textit{Dial}}$, or $\boxed{\textit{Line x}}$.
5   To end the call, press $\boxed{\textit{Rls}}$ or hang up.

If you call a number from the Callers List and you don't get connected, you may have to edit the number (for example, the number may be long distance and you may have to add "1" in front of it). Refer to **Editing in the Callers List** on page 341 for more information.

Editing in the Callers List

If you call a number from the Callers List and you don't get connected, you may have to edit the number (for example, the number may be long distance and you may have to add "1" in front of it).

To edit a number in the Callers List:

1 Press ⌊*Callers*⌋.

2 Press ⌊*Line x*⌋.
   Note: This step is not necessary if the Callers List Mode is set to the "Combined" option. For more information about the Callers List Mode, refer to **Setting the Callers List mode** on page 338.

3 Find the item you want to edit.

4 Press any key on the dialpad to begin editing. This may be required if you have tried to dial the number and there is no connection.

5 To add digits, use the dialpad. To erase one digit to the right of the cursor, press ⌊ → ⌋. To erase one digit to the left of the cursor, press ⌊ ← ⌋.
   Caution: The Callers List does not save changes. If you plan to call the number again, copy it to the Directory or a memory key. For more information, refer to **Copying a contact from the Callers List, Redial List or a memory key to the Directory** on page 141 or **Copying a contact from the Callers or Redial List to a memory key** on page 148

6 To dial the edited number, lift the handset or press ⌊ **Handsfree Mute** ⌋, ⌊*Dial*⌋, or ⌊*Line x*⌋.

For more information, refer to the following topics:

- **Stripping area codes from numbers in the telephone Callers List** on page 375.

- **Dialing back a long distance number in the Callers List using the telephone** on page 343.

Dialing back a long distance number in the Callers List using the telephone

To dial back a long distance number in the Callers List:

1 Press $\boxed{Callers}$.

2 Use $\boxed{\downarrow \quad \uparrow}$ to find the item you want to edit.

3 Using the dialpad, press $\boxed{1}$ and the area code if necessary.

4 To dial the edited number, lift the handset or press $\boxed{\substack{\text{Handsfree} \\ \text{Mute}}}$, $\boxed{Dial}$ or $\boxed{Line\ x}$.

5 If you want to save the number to the directory, press $\boxed{Save}$. Refer to **Copying a contact from the Callers List, Redial List or a memory key to the Directory** on page 141.

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Copying Callers List numbers to the Directory or a Memory key

To copy a number from the Callers List to the Directory or to a memory key:

1 Press [Callers].

2 Press [Line x]. This step is not necessary if the Callers List Mode is set to the combined option. For more information about the Caller List Mode, refer to **Setting the Callers List mode** on page 338.

3 Find the item you want to copy.

4 Press [Save].

5 Press [Directory] or the memory key where you want to store the number.

6 If no name is displayed, you are prompted to enter one. To enter a name, use the dialpad. (Refer to **Entering Names** on page 153.) If you don't want a name, go to step 7.

7 Press [Save].

8 To leave the Callers List at any time, press [Callers] or [Rls].

Deleting from the Callers List

You can delete one entry from the Callers List, or you call delete the entire list.

To delete one number in the Callers List:

1 Press 〈Callers〉.
2 Press 〈Line x〉.
   Note: This step is not necessary if the Callers List Mode is set to the "Combined" option. For more information about the Callers List Mode, refer to **Setting the Callers List mode** on page 338.
3 Find the item you want to delete.
4 Press 〈Delete〉 twice.
5 Press 〈Rls〉.

To delete all numbers in the Callers List:

1 Press 〈Callers〉.
2 Press 〈Line x〉. This step is not necessary if the Callers List Mode is set to the "Combined" option. For more information about the Callers List Mode, refer to **Setting the Callers List mode** on page 338.
3 Press 〈Delete〉 twice while the Callers header ("Callers List = xx") is showing to delete the entire list.

Making a call from the Redial List

The Redial List stores the last ten numbers you dialed. When you press $\boxed{\textit{Redial}}$,the last number you called appears on the screen. You can scroll through the list to view the other numbers.

Note: The 9617 telephone Redial List synchronizes with the Personal Call Manager **Calls** menu **Redial List**.

To make a call from the Redial List:

1 Press $\boxed{\textit{Redial}}$. The telephone display shows the last number you dialed.

2 If you want to redial a different number, find that number by pressing $\boxed{\ \downarrow\ \ |\ \ \uparrow\ }$.

3 When the number is displayed, lift the handset or press $\boxed{\substack{\textsf{Handsfree}\\\textsf{Mute}}}$, $\boxed{\textit{Dial}}$, or $\boxed{\textit{Line x}}$.

Note: If you press $\boxed{\textit{Redial}}$ when the Live Dialpad option is turned on, after lifting the handset or after pressing $\boxed{\substack{\textsf{Handsfree}\\\textsf{Mute}}}$, $\boxed{\textit{Dial}}$, or $\boxed{\textit{Line x}}$, your telephone automatically dials the last number in the Redial List without first displaying it.

For more information, refer to **Deleting the Redial List** on page 347.

Deleting the Redial List

There may be times when you want to delete the contents of the Redial List. For example, if you have dialed a personal number such as a password or your calling card number, you may not want it to appear in the list where anyone can see it.

To delete the Redial List:

1   Press [*Redial*].
2   Press [*Delete*] twice. The entire Redial List is deleted.

Note: You cannot delete individual entries in the Redial List.

You can program security numbers that will not appear on the 9617 telephone display or in the Redial List when they are dialed. For more information, refer to **Preventing the telephone numbers you dial from appearing on the M9617 telephone display** on page 383.

Calls Logs and lists in Personal Call Manager

Personal Call Manager stores your incoming and outgoing calls so you can easily access them. Calls that you have received are stored in the **Callers List** and the **Incoming Calls Log**. Calls that you have made are stored in the **Redial List** and the **Outgoing Calls Log**.

While the **Callers List** and **Redial List** have a limit of 10 calls, the Calls Logs are unlimited in size.

You can use these lists to return calls, redial numbers or store contacts.

For more information, refer to the following topics:

- **Viewing the Incoming and Outgoing Calls Log Window** on page 349
- **Making a call using the Calls Log Window** on page 350
- **Deleting entries in the Incoming and Outgoing Calls Log** on page 351
- **Using the Callers List and Redial List in Personal Call Manager** on page 352
- **The Callers List in Personal Call Manager** on page 353
- **The Redial List in Personal Call Manager** on page 354
- **Returning a call or redialing a number** on page 355

Viewing the Incoming and Outgoing Calls Log Window

To view the Calls Log Window:

1 Click on the **View** menu, or click on the Calls Log Window button on the toolbar (shown on the right).

2 Click on the **Show Call Log Window** menu item. The **Incoming Calls Log Window** or the **Outgoing Calls Log Window** appears. To toggle between these windows, use the View menu or the toolbar buttons described below.

Calls Log Toolbar Buttons

Button	Feature	Description
	Incoming Calls Log	Displays the **Incoming Calls Log** window.
	Outgoing Calls Log	Displays the **Outgoing Calls Log** window.
	Delete	Deletes the selected contacts.

For more information, refer to **Making a call using the Calls Log Window** on page 350.

Making a call using the Calls Log Window

You can return a call from the **Incoming Calls Log Window** by viewing the Log and choosing the call you want to return.

You can redial a number form the **Outgoing Calls Log Window** by viewing the Log and choosing the number you want to redial.

To return a call or redial a number using the Calls Log Window:

1   Click on the **View** menu.

2   Click on the **Show Call Log Window** menu item. The Calls Log you last viewed appears by default.
To view the **Outgoing Calls Log Window**, click on the **View** menu and choose the **Outgoing Calls Log** menu item. To view the **Incoming Calls Log Window**, click on the **View** menu and choose the **Incoming Calls Log** menu item.

3   Double-click the item in the Log that you want to dial.

Tip: You can display the Calls Log window by clicking the Calls Log button on the toolbar (shown on the right).

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

For more information, refer to the following topics:

■   **Copying a contact from the Calls Log to the Address Book** on page 190

Deleting entries in the Incoming and Outgoing Calls Log

The Calls Logs in Personal Call Manager do not have a size limit. As a result, they can become so large that they take a minute or so to appear on your screen. It is a good idea to delete log entries occasionally.

Note: If the Calls Logs are very large, deleting them may take a few minutes.

To delete one entry:

1 Click on the contact you want to delete.

2 Click on the **Edit** menu.

3 Click on the **Delete** menu item.

Tip: You can also right-click on the contact and then click on the **Delete** menu item.

To delete a range of Log entries:

1 Click on the first contact in the range you want to delete.

2 Shift-click the last contact in the range (you may have to scroll down). The range appears selected.

   Tip: You can select more that one contact by **Ctrl**-clicking on each one you want to select.

3 Click on the **Edit** menu.

4 Click on the **Delete** menu item.

Tip: You can also right-click on the selected range and then click on the **Delete** menu item.

Using the Callers List and Redial List in Personal Call Manager

Personal Call Manager keeps two telephone lists that you can use to make calls.

The Callers List contains the telephone numbers of the last ten people who called you.

The Redial List contains the last ten telephone numbers you called.

These lists synchronize with the lists in the 9617 telephone.

For more information, refer to the following topics:

- **The Callers List in Personal Call Manager** on page 353

- **The Redial List in Personal Call Manager** on page 354

The Callers List in Personal Call Manager

Personal Call Manager keeps a list of the telephone numbers of the last ten people who called you while Personal Call Manager was running. The Callers List shows both the calls you answered and the calls you were unable to answer. You can use this list to return the calls.

This list may differ from the Callers List in the 9617 telephone if Personal Call Manager was not running when some calls came in.

The calls shown on the Callers List are numbered from one to ten. Call number ten is the most recent call and is stored at the bottom of the list. Call number one is the oldest call and is stored at the top of the list.

When there are already ten calls on the list and you receive another call, the new call is added to the bottom of the list and the oldest call is deleted.

Telephone numbers are only shown on the Callers List if you subscribe to a Caller ID service.

For more information, refer to the following topics:

- **The Redial List in Personal Call Manager** on page 354

- **Returning a call or redialing a number** on page 355.

The Redial List in Personal Call Manager

Personal Call Manager keeps a list of the last ten telephone numbers you called while Personal Call Manager was running.

This list may differ from the Redial List in the 9617 telephone if Personal Call Manager was not running when you made some calls.

The most recent call is at the top of the list (number one) the oldest call is at the bottom (number 10). When there are already ten calls on the list and you make another call, the new call is added to the top of the list and the oldest call is deleted.

For more information, refer to the following topics:

■ **The Callers List in Personal Call Manager** on page 353

■ **Returning a call or redialing a number** on page 355.

Returning a call or redialing a number

You use the Callers List to return a call. You use the Redial List to redial a number.

To return a call or redial a number:

1 Click on the Personal Call Manager task tray icon or the **Calls** menu. (See **The task tray icon** on page 55.)

2 Point to the **Callers List** menu item or the **Redial List** menu item. A submenu appears.

3 Click on the number you want to call.

Note: All calls made using Personal Call Manager are in Handsfree mode. To turn off Handsfree, lift the handset after the call has been dialed. For information on Handsfree, refer to **Handsfree calls** on page 261.

Using feature keys for network telephone services

Some network features such as Call Forwarding or Call Return provided by your telephone company are turned on and off by feature codes. A feature code usually looks something like this: *76.

To turn a feature on, you dial the feature code provided by the telephone company. To turn a feature off, you dial the same or a different code depending on the feature.

You can store feature codes in the Directory of your telephone or in the Address Book in Personal Call Manager.

For greater convenience, you can store feature codes in the Memory keys of your 9617 telephone. You can also store FeatureLight keys that turn the set indicator light on to remind you that you have activated a feature.

You delete Feature keys the same way you delete Memory keys. For more information, refer to **Deleting memory keys** on page 152.

For more information, refer to the following topics:

- **Saving features in memory keys** on page 357
- **Saving FeatureLight On and Off keys** on page 360

Saving features in memory keys

Some custom calling features require a unique On code and a unique Off code. Other features use the same code for On and Off. (You must subscribe to your telephone company for Custom Calling Features. Contact your telephone company for the appropriate feature codes.)

Features that have unique On and Off codes must be stored in two feature keys. The On feature key stores the On feature code, and the Off feature key stores the Off code. Features that use the same code for both On and Off only need to be stored in one feature key. The procedures for storing an On code and an Off code are the same.

For more information, refer to the following topic:

- **Saving a Feature On or Off Code using the telephone** on page 358

- **Using feature keys** on page 359

- **Programming a memory key as a FeatureLight On or Off key using Personal Call Manager** on page 121

Saving a Feature On or Off Code using the telephone

To save a Feature On or Off code:

1 Press $\boxed{Save}$.

2 Press the memory key you want to save the number into.

3 If you are saving a feature On code, enter the On code. If you are saving a feature Off code, enter the Off code. (You must subscribe to your telephone company for Custom Calling Features. Contact your telephone company for the appropriate feature codes.)

4 Press $\boxed{Save}$.

5 Enter the feature name (e.g., Call Forward) using the dialpad. (Refer to **Entering Names** on page 153.)

6 Press $\boxed{Save}$.

7 Label the memory key as a Feature Key. Refer to **Labeling memory keys** on page 150 for more information.

Using feature keys

When a memory key is programmed with a feature code, you can use it to turn the feature on or off.

To turn a feature on or off:

1 Press the memory key where you stored the desired feature On or Off code. The telephone display shows the feature name and code.

2 Lift the handset or press [Handsfree Mute], [*Dial*], or [*Line x*]. The feature code is dialed out on that line, which turns the feature on or off for that line.

Note: If the Live Dialpad option is turned on, you do not have to lift the handset or press any other button. Pressing the feature key automatically dials the feature code and puts the telephone in Handsfree mode.

The active feature applies only to the line you selected or to the prime line if you did not press a line key. For example, if you want to forward all incoming calls, you must turn the feature on for each line.

Saving FeatureLight On and Off keys

You can make the set indicator light come on when you turn a feature on and go off when you turn that same feature off. You can only do this with one feature.

For example, you may want the light to remind you that you have turned Call Forwarding on. To do this, use one key to turn the indicator light on when you activate the feature. Use the second key to turn the indicator light off when you deactivate that same feature.

Note: If you save a FeatureLight On key, you must also save a Feature Light Off key to turn the set indicator light off when you turn the feature off.

For more information, refer to the following topics:

- **Saving a FeatureLight On key using the telephone** on page 361
- **Saving a FeatureLight Off key using the telephone** on page 362
- **Programming a memory key as a FeatureLight On or Off key using Personal Call Manager** on page 121
- **Using FeatureLight keys** on page 363

Saving a FeatureLight On key using the telephone

To save a FeatureLight On key:

1 Press $\boxed{Save}$.

2 Do NOT select a memory key yet. To program the light on, press $\boxed{1}$.

3 Press the desired memory key.

4 Enter the telephone company feature code for turning the feature on. Contact your telephone company for the appropriate feature codes.

5 Press $\boxed{Save}$.

6 Label the memory key. Refer to **Labeling memory keys** on page 150.

Note: If you save a FeatureLight On key, you must also save a Feature Light Off key to turn the set indicator light off when you turn the feature off.

Saving a FeatureLight Off key using the telephone

To save a FeatureLight Off key:

1 Press `Save`.

2 Do NOT select a memory key yet. To program the light off, press `0`.

3 Press the desired memory key.

4 Enter the telephone company feature code for turning the feature off. Contact your telephone company for the appropriate feature codes.

5 Press `Save`.

6 Label the memory key. Refer to **Labeling memory keys** on page 150.

Using FeatureLight keys

To turn a feature and light on or off:

1 Press the memory key where you stored the Feature-Light. The telephone display shows **FeatureLight ON** or **FeatureLight OFF**.

2 Lift the handset or press [Handsfree **Mute**], [*Dial*], or [*Line x*]. The feature turns on or off for that line, and the light turns on or off accordingly. (When the feature and light are on and you're not using the telephone, the telephone display shows **Feature ON** and the line that it applies to as a reminder.)

Note: If you see an arrow (–») on the right of the telephone display, you may have to press [→] to view the Feature message and light.

Also note that if the Live Dialpad option is turned on, you do not have to lift the handset or press any other button. Pressing the feature key automatically dials the feature code and puts the telephone in Handsfree mode.

Timing the length of your calls

There are two ways to time the length of your calls.

You can choose to have the Call Timer automatically displayed on the third line of the telephone display instead of the date and time when you are on a call.

Or, if you don't want the call timer to display automatically when you are on a call, you can program the call timer to appear only when you press a Call Timer memory key.

Both lines are timed separately.

Note: Telephone calls are always timed in Personal Call Manager.

For more information, refer to the following topics:

- **The automatic Call Timer feature** on page 365
- **The Call Timer key** on page 366

The automatic Call Timer feature

You can choose to have the Call Timer automatically displayed on the third line of the telephone display instead of the date and time when you are on a call.

To turn the automatic Call Timer on or off:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ⎡ ↓ ⎢ ↑ ⎤ to scroll to option number 18 or press ⎡1⎤ ⎡8⎤.

4 Press ⎡✳⎤ to turn the automatic Call Timer on or off.

5 Press ⎡*Rls*⎤.

The Call Timer key

If you don't want the call timer to automatically appear when you are on a call, you can program the call timer to appear only when you press a Call Timer memory key. Both lines are timed separately.

For more information, refer to the following topics:

- **Adding a Call Timer key** on page 367
- **Using the Call Timer key** on page 368
- **Deleting a Call Timer key** on page 369

Adding a Call Timer key

If you don't want the call timer to automatically appear when you are on a call, you can program the call timer to appear only when you press a call timer memory key. Both lines are timed separately.

To program a memory key as a timer key:

1   Press the Options key.

2   Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3   Use ↓ | ↑ to scroll to option number 20 or press 2 0.

4   Press ✱ to add a Timer key.

5   Press a memory key.

6   Press *Save*.

7   Label the timer key. Refer to **Labeling memory keys** on page 150.

8   Press *Rls*.

You can also program a memory key as a timer key in Personal Call Manager. For more information, refer to **Assigning the Call Timer feature to a memory key** on page 116.

Using the Call Timer key

The timer key is used to display the length of a call when you don't have the automatic call timer turned on.

If you press the timer key when on a call, the timer for that call appears on the third line of the telephone display. If you press the timer key when you are not on a call, the timer for the last call on each of your telephone lines appears.

To turn off the display of the call timer, simply press the timer key again.

For information on adding a Call Timer key, refer to **Adding a Call Timer key** on page 367.

To show the timer on the display:

1 Make or answer a call. The timer starts running automatically.

2 Once on the call, press the timer key. The telephone display shows the running time of the active call on the third line of the telephone display.

Deleting a Call Timer key

To delete a Call Timer key

1 Press the timer key.
2 Press $\boxed{\textit{Delete}}$ twice.

Redialing busy telephone numbers automatically

When you make a call and get a busy signal, you can use the Busy Redial feature to continue calling that number automatically until your line gets through.

To set up this feature, you have to program a Busy Redial key, enter the number of redial attempts you want your 9617 telephone to make before it stops, and enter the delay time between attempts.

For more information, refer to the following topics:

■ **Creating an Automatic Busy Redial key** on page 371

■ **Specifying the time delay between redial attempts** on page 372

■ **Specifying the number of redial attempts** on page 373

■ **Using the Automatic Busy Redial Feature** on page 374

Creating an Automatic Busy Redial key

To create a Busy Redial key:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ⌊ ↓ | ↑ ⌉ to scroll to option number 22 or press ⌊2⌋ ⌊2⌋.

4 Press ⌊✱⌋.

5 Press a memory key.

6 Press ⌊*Save*⌋.

7 Press ⌊*Rls*⌋.

8 Label the Busy Redial key. Refer to **Labeling memory keys** on page 150.

You can also program a memory key as a Busy Redial key in Personal Call Manager. For more information, refer to **Assigning the Auto Busy Redial feature to a memory key** on page 115.

Specifying the time delay between redial attempts

To specify the time delay between redial attempts:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use $\boxed{\;\downarrow\;\;|\;\;\uparrow\;}$ to scroll to option number 23 or press $\boxed{2}\;\boxed{3}$.

4 Press $\boxed{\text{\textasteriskcentered}}$.

5 Enter the time delay in seconds (99 seconds maximum.)

6 Press $\boxed{\textit{Save}}$.

7 Press $\boxed{\textit{Rls}}$.

Specifying the number of redial attempts

To specify the number of redial attempts:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use $\boxed{\downarrow}$ $\boxed{\uparrow}$ to scroll to option number 24 or press $\boxed{2}$ $\boxed{4}$.

4 Press $\boxed{*}$.

5 Enter the number of redial attempts you want your telephone to make (maximum 15).

6 Press $\boxed{Save}$.

7 Press $\boxed{Rls}$.

Using the Automatic Busy Redial Feature

There are two ways to use the Automatic Busy Redial feature. When you make a call and get a busy signal, hang up the call and press the Busy Redial key. Your telephone begins automatically redialing the last number in the Redial List using the line that you used to make the original call.

Or, you can predial a number (the live dialpad option must be off - refer to **Selecting the dialpad option** on page 239) and then press the Busy Redial key. In this case, your telephone begins automatically redialing the number using the Prime line.

To stop the redial attempts, simply press the Busy Redial or any other key, or perform any other function on your telephone.

Note: When your call gets through, you can begin talking after you pickup the handset or press ⌈ **Handsfree Mute** ⌋ to unmute the Handsfree microphone.

For more information, refer to **Redialing busy telephone numbers automatically** on page 370.

Stripping area codes from numbers in the telephone Callers List

In some areas, the telephone company sends the area code of all local calls with the Caller ID information. However, you may not be able to dial local numbers using the telephone Callers List until you remove the area code from the numbers stored there. If this is the case in your area, you can use the area code stripping feature.

When you enter an area code or prefix using this feature, your 9617 telephone removes that code or prefix from numbers stored in the telephone Callers List. You can enter three separate area codes or prefixes, each up to seven digits long.

For example, if you enter your area code into this option, all calls in your area code appear in the Callers List with the area code stripped off – the area code appears in brackets following the rest of the telephone number (see **The Callers List** on page 43).

Note: It is highly recommended that you enter your local area code(s) using this option **and** in the **Area Code** field on the **Dialing Properties** dialog box in Personal Call Manager. To access this dialog box, click on the **Tools** menu and select the **Dialing Properties** menu item.

For more information, refer to the following topics:

- **Entering area codes and prefixes you want stripped off incoming calls** on page 376
- **Editing or deleting area codes and prefixes** on page 377
- **Using the Callers List to return a call** on page 236

Entering area codes and prefixes you want stripped off incoming calls

To enter area codes and prefixes:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ↓ ↑ to scroll to option number 14 or press 1 4.

4 Press ✱.

5 Enter the area code or prefix using the dialpad and press *Save*. Repeat this step for each area code or prefix you want to enter, for up to three codes.

6 Press *Rls*.

You can also enter area codes to be stripped from telephone numbers in the telephone Callers List using Personal Call Manager. For more information, refer to the **Area Codes** paragraph under the topic, **The Phone Display tab** on page 99.

Editing or deleting area codes and prefixes

To delete or edit an area code or prefix:

1   Press the Options key.

2   Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3   Use $\boxed{\downarrow}$ $\boxed{\uparrow}$ to scroll to option number 14 or press $\boxed{1}$ $\boxed{4}$ to go directly to the item.

4   Press $\boxed{\ast}$. The first area code is displayed. If this is not the number you want to delete or change, go to step 5. If it is, go to step 6.

5   Press $\boxed{Save}$ until you see the number you want to edit or delete.

6   Edit or delete the area code (press $\boxed{\leftarrow}$ to backspace).

7   Press $\boxed{Save}$.

8   Press $\boxed{Rls}$.

Restricting the telephone numbers that can be dialed

Dialing Restrictions are used to prevent certain numbers from being dialed out. You can enter three 7-digit dialing restrictions. If you attempt to dial a number that matches the restricted digits, the message `Restricted number` appears on the telephone display.

For example, if you entered the codes 0, 1, and 411, any number beginning with 0, 1 or 411 could not be dialed from the telephone. However, the number 555-0411 could be dialed because it does not begin with the restricted digits.

For more information, refer to the following topics:

Entering dialing restrictions

To enter Dialing Restrictions:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ⎣↓ ↑⎦ to scroll to option number 15 or press ⎣1⎦ ⎣5⎦.

4 Press ⎣✱⎦.

5 Enter the digits you want restricted and press ⎣*Save*⎦. Repeat this step for each dialing restriction you want to enter.

6 Press ⎣*Rls*⎦.

Important: Care must be taken when you are restricting numbers that start with 9. If you enter 9, 91, or 911 as one of your dialing restrictions, you will not be able to dial the emergency services number 911. To make sure this does not happen, enter 911 as a dialing restriction override. For more information, refer to **Overriding dialing restrictions** on page 381.

Editing or deleting dialing restrictions

To delete or edit dialing restrictions:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use $\boxed{\downarrow \quad \uparrow}$ to scroll to option number 15 or press $\boxed{1}$ $\boxed{5}$.

4 Press $\boxed{*}$. The telephone display shows `1st code>`. If this is the number you want to delete or change, go to step 6. If not, go to step 5.

5 Press $\boxed{Save}$ until you view the code you want to edit or delete.

6 Edit or delete the dialing restriction (press $\boxed{\leftarrow \quad}$ to backspace).

7 Press $\boxed{Save}$.

8 Repeat steps 5 and 6 for the restricted digits that you want to delete or edit.

9 Press $\boxed{Rls}$.

Important: Care must be taken when you are restricting numbers that start with 9. If you enter 9, 91, or 911 as one of the dialing restrictions, you will not be able to dial the emergency services number 911. To make sure this doesn't happen, enter 911 as a dialing restriction override. For more information, refer to **Overriding dialing restrictions** on page 381.

Overriding dialing restrictions

Dialing Restrictions are used to prevent certain numbers from being dialed out. You can, however, program three numbers to override the restricted numbers feature. You can program three 7-digit overrides.

For example, if you entered the 0, 1, and 411 as restricted numbers, any number beginning with 0, 1 or 411 could not be dialed from the telephone. However, if you entered 4118 as an override number, you could dial the number 411-8679.

To enter dialing restrictions overrides:

1. Press the Options key.

2. Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3. Use ⎣ ↓ ⎪ ↑ ⎦ to scroll to option number 16 or press ⎣1⎦ ⎣6⎦.

4. Press ⎣✱⎦.

5. Enter the digits you want to override the dialing restrictions and press ⎣*Save*⎦. Repeat this step for each dialing restriction override you want to enter.

6. Press ⎣*Rls*⎦.

Editing or deleting dialing restriction overrides

To edit or delete dialing restriction overrides:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ⟨ ↓ │ ↑ ⟩ to scroll to option number 16 or press ⟨1⟩ ⟨6⟩.

4 Press ⟨✱⟩. The first override number appears. If this is the number you want to edit, go to step 6. If not, go to step 5.

5 Press ⟨Save⟩ until you see the number you want to edit or delete.

6 Edit or delete the number (press ⟨←⟩ to backspace).

7 Press ⟨Save⟩.

8 Repeat steps 5 and 6 for the overrides that you want to edit or delete.

9 Press ⟨Rls⟩.

Preventing the telephone numbers you dial from appearing on the 9617 telephone display

The 9617 is equipped with a Security Numbers feature to keep selected numbers private when you dial. When you have entered a security number using this option, your telephone does not display or store the digits that you dial after that security number. Instead, the numbers that follow the security number are replaced with the * symbol on the telephone display. You can secure up to three 12-digit numbers.

For example, Joe enters 291-9000 as a security number in the Options list. His Voice Mail number is 1234 and his password is 5678. To access his messages, Joe dials 291-9000 1234 5678. Because the Voice Mail number and password follow the security number, the telephone display shows 291-9000 **** ****, and Joe's password is not displayed or stored in the Redial List. For more information on the Redial List, refer to **Making a call from the Redial List** on page 346.

For more information, refer to the following topics:

- **Entering security numbers** on page 384
- **Editing and deleting security numbers** on page 385

Entering security numbers

To enter a security number:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ⬇ ⬆ to scroll to option number 17 or press 1 7.

4 Press ✱.

5 Using the dialpad, enter the secure number.

6 Press *Save* to end.

7 Repeat steps 5 and 6 for each security number you want to enter.

8 Press *Rls*.

Editing and deleting security numbers

To edit or delete a security number:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use $\boxed{\downarrow}$ $\boxed{\uparrow}$ to scroll to option number 17 or press $\boxed{1}$ $\boxed{7}$.

4 Press $\boxed{\ast}$.

5 Press $\boxed{Save}$ until you find the number you want to change or delete.

6 Edit or delete the number (press $\boxed{\leftarrow}$ to backspace).

7 Press $\boxed{Save}$.

8 Press $\boxed{Rls}$.

Printing your Address Book

There are two main steps to print out the contacts stored in your Address Book.

1 Export your contacts to a text file. For information on how to do this, refer to **Importing and exporting contacts** on page 191.

2 Import the text file into spreadsheet or database program, format it, and then print it from that program.

Note: You can open the text file containing your contacts in a word processor or editor such as the Windows Notepad accessory; however, you will have to format it to make it presentable.

Connecting a fax machine or modem to the telephone

The Fax Switch feature allows you to attach a fax machine or modem to the 9617 telephone. The illustration below is a schematic view of all phone connections, including a fax machine.
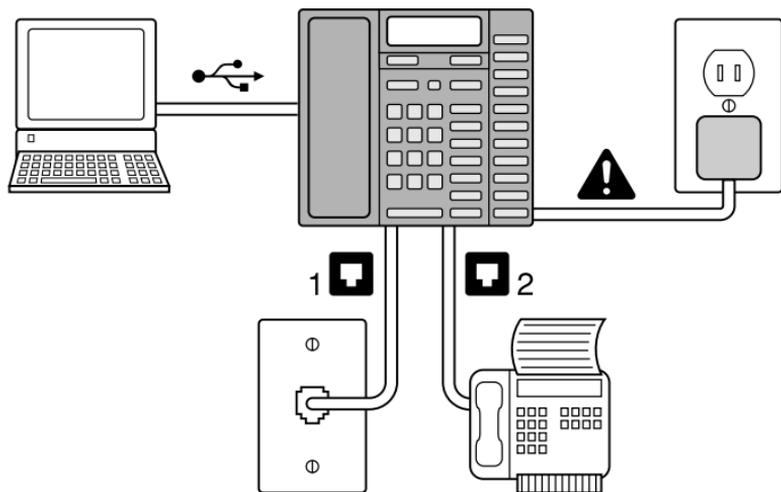
To use a Fax Switch peripheral:

- Both Line 1 and Line 2 must be combined on one telephone cord which is plugged into jack 1 of the 9617 telephone (Refer to **Determining whether you have two telephone lines on one telephone cord** on page 6 for more information.)

- The Fax Switch peripheral must be connected to jack 2 on the back of the telephone (use the telephone cord that was supplied with your fax machine)

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■ You must subscribe to your telephone company for Distinctive Ringing on line 2. The telephone company will then provide you with an additional telephone number for line 2 which will ring with a slightly different ring tone. (The name of the Distinctive Ringing service varies from area to area. Contact your telephone company for more information.) **This additional telephone number is your fax number.**

■ You must turn on the Fax Switch feature. For more information, refer to **Setting the Fax Switch** on page 390.

■ The Fax Switch peripheral should be set to answer after three or more rings.

Note: Do not subscribe to Call Waiting on Line 2 if you are using the Fax Switch feature. If Line 2 of your 9617 telephone has Call Waiting enabled, your Fax Switch peripheral may lose data or be disconnected if you get a Call Waiting caller on line 2.

How it works

The first ring of an incoming call on line 2 rings at both the 9617 telephone and the Fax Switch peripheral. The 9617 telephone uses this ring to identify which device the call is intended for.

If it is a normal ring, the call is routed to the 9617 and the Fax Switch peripheral stops ringing.

If it is a distinctive ring, the call is routed to the Fax Switch peripheral and the 9617 stops ringing.

Note: If the Long Distance Ringing service is available in your area, long distance calls will be sent to the Fax Switch peripheral. If this is the case, do not use the Fax Switch feature.

When the Fax Switch peripheral is idle, line 2 of the 9617 terminal can be used as a normal line. When the Fax Switch peripheral is in use, the line 2 indicator light is on.

Setting the Fax Switch

You can program the telephone to enable or disable the Fax Switch feature.

To set the Fax Switch:

1 Press the Options key.

2 Enter your Options password if required. Refer to **Setting the Options password using the telephone** on page 87 for more information.

3 Use ⌄ ⌃ to scroll to option number 10, or press 1 0 .

4 Press ✱ to enable or disable the Fax Switch.

Uninstalling Personal Call Manager

In certain situations, you may want to remove Personal Call Manager from your computer. For example, when you get a new computer you will want to move Personal Call Manager to the new computer. The Uninstall program removes the files that comprise Personal Call Manager from the computer hard disk.

To remove the Personal Call Manager software:

1 Make sure you have exited from Personal Call Manager, Launch Pad and any other accessory applications installed with Personal Call Manager.

2 Click on the Windows® **Start** button and point to the **Settings** menu item. A submenu appears.

3 Click on the **Control Panel** menu item.

4 Double-click on the **Add/Remove Programs** icon.

5 Click on **Personal Call Manager**.

6 Click on the **Add/Remove** button.

Most of the files associated with Personal Call Manager are removed from your computer hard drive. You may have to manually delete the following files from your **Windows**/**System** directory:

- 9617.sys; 9617.inf

- nttsp.tsp; ntuisp.hlp; ntuisp.dll

Tip: If you are moving Personal Call Manager to a new computer, use the Windows Find feature to locate the **PCMAddressBook.mdb** file and make a copy of it before you remove Personal Call Manager. You can then copy this file to the new computer where Personal Call Manager is installed. This copies all of the contacts you added to the Address Book onto the new computer.

The Voice Mail Assistant

Personal Call Manager comes bundled with a Voice Mail utility call Voice Mail Assistant. This utility allows you to access your Voice Mail from your computer.

To start Voice Mail Assistant:

1 If you see a desktop shortcut called "Voice Mail Assist," double-click on it.

OR

1 Click on the Windows® **Start** menu.

2 Point to the **Programs** menu item. A submenu appears.

3 Point to the **Personal Call Manager** menu item. A submenu appears.

4 Click on the **Voice Mail Assist** menu item. The main window appears.

OR

1 Right-click on the Message Waiting or Personal Call Manager icon in the task tray and then click on the **Start Voice Mail Assistant** menu item.

Tip: Click once on the Voice Mail icon in the task tray to display the Voice Mail Quick Access bar.

Getting Help

The Voice Mail Assistant application contains help topics on how to set up and use it. To access help, do one of the following:

■ click on the **Help** menu;

- right-click on any field or button and click on the **What's this?** menu item;

- click in a field and then press F1 on the keyboard; or

- click and hold the mouse button on a button and then press F1 on the keyboard.

The Launch Pad application

Personal Call Manager comes with a utility called Launch Pad. This utility allows you to assign applications to any of the 9617 telephone's memory keys. When Launch Pad is running, pressing a memory key on the telephone starts the assigned application.

Note: Launch Pad must be running in order for a memory key to launch an application.

When Launch Pad is running, its icon (shown on the right) appears in the task tray. (See **The task tray icon** on page 55 for an illustration of the task tray.)

To launch an application using Launch Pad, you must first assign an application to a memory key. You can then use the memory key to launch the application.

For more information, refer to the following topic:

- **Starting the Launch Pad application** on page 395

- **Assigning an application to a memory key using Launch Pad** on page 396

- **Starting an application using Launch Pad** on page 397

Starting the Launch Pad application

When you launch the Launch Pad application, its icon appears in the task tray but not on the task bar. (See **The task tray icon** on page 55 for an illustration of the task tray.)

To start Launch Pad application:

1   Click on the Windows® **Start** menu.

2   Point to the **Programs** menu item. A submenu appears.

3   Point to the **Personal Call Manager** menu item. A submenu appears.

4   Click on the **Launch Pad** menu item.

OR

1   If a Launch Pad shortcut appears on your desktop, double-click on it.

The main window does not appear by default. To view the Launch Pad main window, double-click the Launch Pad icon (shown on the right) in the task tray.

Getting Help

Press F1 for help when in the application.

Assigning an application to a memory key using Launch Pad

To assign an application to a memory key:

1 Double-click the Launch Pad icon (shown on the right) in the task tray. The main window appears.

2 Click on the **Configure Phone** button. The **9617 Configuration Properties** dialog box appears.

3 Click on the **Memory Keys Assignment** tab.

4 Select a memory key by clicking on a radio button.

5 Select **Application** from the drop down box.

6 Click on the **Configure** button. The **Application Key** dialog box appears.

7 Type in a short name for the application.

8 Select the application's executable (.exe) file by clicking on the **Browse** button.

9 To have the Launch Pad application start automatically when you start your computer, click on the **Run Launch Pad on startup** option.

10 Click on the **OK** button.

11 Label the memory key. (Refer to **Labeling memory keys** on page 150.)

Note: If the Launch Pad window doesn't reflect the latest changes you have made, click on the **Refresh** button.

For information on using Personal Call Manager to do assign an application to a memory key, refer to **Assigning an application to a memory key** on page 117.

Starting an application using Launch Pad

Launch Pad must be running in order for a memory key to launch an application.

To start an application using Launch Pad:

1   On the 9617 telephone, press the memory key to which the application is assigned.

Keyboard shortcuts

The follow keyboard shortcuts are available when
Personal Call Manager is the active application.

Key	Function
F1	activates Personal Call Manager help
F3	displays the **Dial** dialog box
F6	moves the cursor back and forth between the Tree View and the List View in the Address Book
F10 or Alt	activates the menus in Personal Call Manager (use the arrow key on the keyboard to move right and left through the menu bar)
Delete	hangs up the selected call, or deletes the selected contact or folder
Return	selects the OK button on open/active dialog boxes
Esc	selects the Cancel button on open/active dialog boxes
Alt+F4	exits the application
Tab	moves the cursor from one field to the next on dialog boxes
arrow keys	moves the cursor between folder and contact selections and menus

Using this Guide

This Guide is meant as a reference for using the 9617 telephone with Personal Call Manager.

The instructions in this Guide assume that you have a working knowledge of Windows®.

While this Guide is designed primarily for use online, it can also be printed.

Note: For optimum online viewing, set both the Screen and Desktop Display Area settings to 1024x768, and the Color palette to True Colour (32 bit).

For more information, refer to the following topics:

- **Flipping through this Guide** on page 400
- **Printing this Guide** on page 406
- **Windows online help** on page 407

Flipping through this Guide

To view this online Guide, use Adobe Acrobat® Reader software. Some basic instructions on how to use this Guide are provided below. If you need more detail, refer to the Acrobat® Reader Online Guide.

To access the Acrobat® Reader Online Guide:

1   In Acrobat Reader, click on the **Help** menu.

2   Click on the **Reader Online Guide** menu item. The Guide appears.

Scrolling through this Guide

To scroll through the pages of this Guide, use the navigation toolbar buttons (shown below) or scroll bars in Acrobat Reader, or press the **Page Up** or **Page Down** keys on the keyboard.


```
A   B   C   D   E   F
```
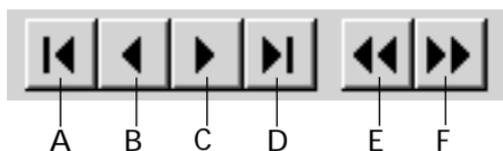
A. Displays the first page   **B**. Displays the previous page
C. Displays the next page   **D**. Displays the last page
E. Goes to the previous view **F**. Returns to the next view

For more information, refer to the following topics:

- **Using hotlinks** on page 401

- **Bookmarks** on page 402

- **Retracing your steps** on page 403

- **Searching for topics – the Find feature** on page 404

- **Zooming in or out on the page** on page 405

Using hotlinks

If it's green, you can click on it

Hotlink text allows you to jump to different topics in this Guide by simply clicking. Hotlink text is green, **like this**.

When you point to a hotlink, the mouse pointer arrow changes into a pointing hand

Using this guide

(shown above, right). To jump to the topic the hand is pointing to, click on it.
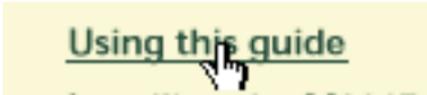
To use hotlinks, ensure you have selected the Hand tool. This tool is selected by default. To select the Hand tool, click on the Hand tool button (shown on the right) on the Acrobat Reader toolbar.

You can click on these, too

The buttons at the top and bottom of the page are also hotlinks.

TOPICS HELP
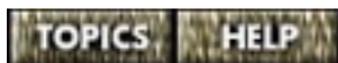
A   B

A. Displays the list of help topics.
B. Displays instructions for using this Guide.

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Bookmarks

When you opened this Guide, bookmarks appeared to the left of the page. Each bookmark is a hotlink to its associated topic. To jump to a topic, click on it. To see subtopics, click the arrow to the left of a topic.

Bookmarks are provided for your convenience only. You can hide them to reduce the amount of space this Guide uses on the screen.

To hide bookmarks:

1 Click on the **View** menu in Acrobat Reader.

2 Click on the **Page Only** menu item. The bookmarks disappear.

OR

1 Click on the Page Only button (shown on the right) on the toolbar.

Retracing your steps

You can easily retrace your steps through this Guide by using the Go Back or Go Forward buttons on the Acrobat Reader toolbar.

A B

A. Go Back
B. Go Forward

Click on the Go Back button to see the previous page you looked at. By continually clicking this button, you can review, one page at a time, all of the pages in the Guide you have seen.

To go forward again one page at a time, click on the Go Forward button.

Searching for topics – the Find feature

Be sure to use the Find feature in Acrobat® Reader to locate topics of interest to you. The Find feature finds all instances in this manual of the word you specify.

To search for a topic:

1 Click on the **Tools** menu in Acrobat® Reader.

2 Click on the **Find** menu item. The **Find** dialog box appears.

3 Enter the word related to the topic you are looking for. For example, to find topics related to the Directory, enter the word, "Directory" in the Find box.

4 Click on the **Find** button. Acrobat Reader highlights the first occurrence of the word you entered.

5 To find the next occurrence of the word, click on the **Tools** menu and then click on the **Find Again** menu item. Acrobat Reader finds and highlights the next occurrence of the word.

6 Repeat step 5 until you have found the topic you were looking for.

Using the online index

You can also use the online index to locate help topics. To access the index, click on the Main button at the top of this page and click on the Index topic.

Zooming in or out on the page

You may want to magnify the document to get a better look at screens or anything else that is not clear.

For example, to get a better view of the graphics in this Guide, zoom the page view to 200%.

To zoom the page view:

1   In Acrobat Reader, click on the **View** menu.

2   Click on the **Zoom** menu item.

OR

1   Click on the Zoom button (shown on the right) on the toolbar and then click on or draw a marqee around the area you want to zoom.

Printing this Guide

You can print this entire Guide or just the pages with the topics that interest you.

To print all or part of this guide:

1 Click on the **File** menu.

2 Click on the **Print...** menu item.

3 Enter the page number, a page range or click on **All**. This User Guide includes an Index that prints for your convenience.

   Warning: Due to the size of this guide (over **400** pages), we recommend that you only print the pages you need.

4 Click on the **OK** button.

Tip: If you have a Postscript printer, you may be able to conserve paper by printing two pages of this Guide on each sheet of paper. This print method is known as "2-up" or "2 pages per sheet". To specify 2-up printing, use the **Printer Properties** dialog box.

To access the Printer Properties dialog box:

1 Click on the **File** menu.

2 Click on the **Print Setup...** menu item. The **Print Setup** dialog box appears.

3 Click on the **Properties** button.

Each type of printer has different properties. Consult your printer's user guide or on-line help for information on setting properties.

Windows online help

Much of the information in this Guide about Personal Call Manager can also be found in the Windows® online help files included with the Personal Call Manager application.

Note: Windows online help covers topics related to Personal Call Manager only, not the 9617 telephone.

The online help Contents screen

You can access the main Contents help window from the Personal Call Manager menu bar and toolbar.

To access the main online help window:

1   Click on the **Help** menu.

2   Click on the **Help topics** menu item.

OR

1   Click on the [?] Help button on the toolbar.

The main help window gives you three options for accessing help information.

From the **Contents** tab, you can view all of the main help topics. To move to one of the topics, double-click on that topic.

From the **Index** tab, you can view an alphabetically sorted list of keywords and concepts. The terms listed on the **Index** tab are more detailed than the topics shown on the **Contents** tab. To see a topic associated with a keyword, click on it.

The main help window also has a **Find** tab. The **Find** tab allows you to enter a word or topic for which you need help information. The **Find** feature searches through the help topics and displays a list of topics that contain information about the word or topic you entered.

Context Sensitive help

You can also use context sensitive help. Use this method to learn about specific areas you select on the screen using the mouse pointer.

To see help about the currently active window, dialog box or text field, simply press F1 on the keyboard.

To see help about a menu item, point to it, then press F1 on the keyboard.

If a question mark appears in the top left corner of a dialog box, or window, click on it. The cursor changes into a pointing arrow with a question mark on it. Click on any area of the dialog box to see help information about it.

In the **9617 Configuration Properties** dialog, you can also try right-clicking on text field or area. When the menu item "What's this?" appears, click on to it see help information about that area.

Troubleshooting

Following are some solutions to common problems. If you see your problem listed below, click on it to jump to the page it is found on. Then determine which cause of that problem applies to you and then follow the suggested solution.

- **The telephone display is not in the language I want.**
- **The telephone display is blank and the ringer volume is low.**
- **I can't see the name and number of my callers on the telephone display.**
- **I can see Caller ID information for regular calls, so why can't I see it for Call Waiting calls?**
- **How do I answer a Call Waiting call?**
- **My incoming calls are not being logged in the Callers List.**
- **I cannot dial a number in the telephone's Callers List.**
- **When I call from the Callers List, the area code is dialled for local calls.**
- **I cannot program a memory key.**
- **I cannot save a Directory number into a memory key.**
- **The cursor doesn't move when saving in the Directory.**
- **I cannot hear anything on the handset receiver.**

- The telephone was ringing and when I answered all I could hear was a dial tone.

- The Handsfree speakerphone is not working.

- How do I make my fax work with this telephone?

- I keep getting the message Check phone cord.

- The red set light is on, and the message, feature on, appears on the telephone display.

- When I press numbers on the telephone dialpad, they appear on the telephone display but are not dialed out.

- The telephone wobbles.

- I can't get rid of a call icon in the Personal Call Manager Calls box even though the caller has hung up.

- The name of a contact in the Directory is different from the name that appears in the Quick Dials folder.

- The Personal Call Manager Calls Log Window takes a long time to appear.

- The ring configuration setting I chose for a contact in my Quick Dials folder is not working

- When I export contacts from the Address Book, the resulting text file is incomplete and/or the contact information is jumbled.

- When contacts saved in my Address Book call, the names I entered in my Address Book don't appear (i.e., the Name Matching feature (see page 273) isn't working).

■ **The problem I'm having isn't listed here**

The telephone display is not in the language I want.

Cause: An alternate language has been chosen. Display prompts on the 9617 telephone can appear in English, French, or Spanish.

Solution: To choose the language you want, refer to **Changing the telephone display language** on page 20.

The telephone display is blank and the ringer volume is low.

Cause: The telephone is not receiving electrical power.

Solution: Check that the power adapter is connected to the telephone, and that the phone is connected to a working outlet. You can test the outlet with another device, such as a lamp.

> **Note**: During a power outage, the 9617 telephone still operates as a regular telephone (only Line 1 works in this situation). You can still receive and make calls (using the dialpad); however, the other keys and the telephone display will not operate until the power is restored.

I can't see the name and number of my callers on the telephone display.

Cause: You have not subscribed to a Caller ID service from your telephone company.

Solution: Contact your telephone company to ensure you subscribe to this service.

Cause: You answered the call before the second telephone ring. Caller ID information is sent to your telephone between the first and second ring.

Solution: Let the telephone ring at least twice before answering.

I can see Caller ID information for regular calls, so why can't I see it for Call Waiting calls?

Cause: You have not subscribed to a Call Waiting ID service from your telephone company.

Solution: Contact your telephone company to subscribe to this service.

Cause: You do not have the Call Waiting ID display option turned on.

Solution: For information on turning this option on, refer to **Choosing the Call Waiting ID option** on page 268.

> **Note**: When two or more telephones are on the same call, you will not be able to receive Call Waiting ID.

How do I answer a Call Waiting call?

To answer a Call Waiting call using the telephone, press `Link`. To answer a Call Waiting call using Personal Call Manager, double-click on the call icon in the **Calls** box. For more information, refer to **Answering a Call Waiting call using the telephone** on page 266.

My incoming calls are not being logged in the Callers List.

Cause: You don't subscribe to the Caller ID service. Without this service, your telephone does not log incoming calls.

Solution: Contact your telephone company to ensure you subscribe to this service.

Cause: You may have set up the Callers List to log "No Calls".

Solution: Change the Callers List mode to log either all calls or unanswered calls. For more information, refer to **Setting the Callers List mode** on page 338.

I cannot dial a number in the telephone's Callers List.

Cause: The caller may have an "Unknown" or "Private" number.

Solution: None. You won't be able to return calls unless the number is stored in the Callers List.

Cause: The number as it was received from the telephone company cannot be dialed.

Solution: You may have to edit the number in the Callers List before you can dial it. For more information, refer to **Editing in the Callers List** on page 341.

Cause: The local telephone numbers received with Caller ID include the area code, and your telephone service won't allow you to dial the area code for local calls.

Solution: Try stripping the area codes from incoming telephone numbers so you can dial them. For more information, refer to **Stripping area codes from numbers in the telephone Callers List** on page 375.

When I call from the Callers List, the area code is dialled for local calls.

Cause: The local telephone numbers received with Caller ID include the area code, and your telephone service won't allow you to dial the area code for local calls.

Solution: Try stripping the area codes from incoming telephone numbers so you can dial them. For more information, refer to **Stripping area codes from numbers in the telephone Callers List** on page 375.

I cannot program a memory key.

Cause: Some of the memory keys on your telephone may be factory-programmed.

Solution: None. Factory programmed keys are locked; you cannot erase or reprogram them.

I cannot save a Directory number into a memory key.

Cause: You cannot copy Directory contacts directly into memory keys.

Solution: Save the name and number manually. For more information, refer to **Adding a contact to the telephone Directory** on page 140.

The cursor doesn't move when saving in the Directory.

Cause: The number or name you are entering is too long.

Solution: Don't enter numbers longer than 24 digits or names longer than 16 characters.

I cannot hear anything on the handset receiver.

Cause: The handset cord is not connected properly.

Solution: Make sure the handset cord is inserted securely into the handset jack. For more information, refer to **Connecting the cords** on page 7.

Cause: The handset receiver volume is too low.

Solution: Make sure the receiver volume is high enough. For more information, refer to **The handset and Handsfree speaker volume** on page 52.

Cause: Your telephone line setup may not be connected properly.

Solution: Check to ensure your setup is correct. For more information, refer to **Installing the M9617 telephone** on page 5.

Cause: The Headset mode is enabled. When the Headset mode is enabled, you cannot use the handset.

Solution: Disable the Headset mode. For more information, refer to **Using a headset** on page 238.

The telephone was ringing and when I answered all I could hear was a dial tone.

Cause: If the telephone continued to ring after you answered it, the incoming call was on the other line.

Solution: Press the line key with the flashing light beside it to answer the call. You may want to change your answer mode. For more information, refer to **Selecting the answer mode** on page 270.

The Handsfree speakerphone is not working.

Cause: The Headset mode is enabled. When the Headset mode is enabled, you cannot use the Speakerphone.

Solution: Disable the Headset mode. For more information, refer to **Using a headset** on page 238.

Cause: If your caller couldn't hear you, you may have muted the Handsfree speakerphone. When it is muted, the red light beside the ⬚ Handsfree Mute ⬚ key flashes quickly.
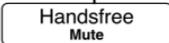
Solution: Press the ⬚ Handsfree Mute ⬚ key again to unmute it. (The light stops flashing and your caller can hear you.) for more information, refer to **Handsfree calls** on page 261 and **Handsfree/Mute indicator light messages** on page 40.

How do I make my fax work with this telephone?

There are several steps to connecting your fax to the 9617 telephone. For instructions, refer to **Connecting a fax machine or modem to the telephone** on page 387.

I keep getting the message `Check Phone cord.`

Cause: One of your telephone cord(s) is not connected properly.

Solution: Check to ensure your telephone cord(s) are connected properly.

Cause: You are only using one telephone line with the 9617 telephone. The two-line 9617 telephone assumes that you are using two lines, and warns you that one of them is not connected.

Solution: Disable the `Check Phone cord` message using the Options list. For more information, refer to **Clearing the Check line cord message** on page 48.

The red set light is on, and the message, `feature on,` appears on the telephone display.

Cause: Someone has pressed a FeatureLight On key.

Solution: You need to press the corresponding FeatureLight Off key. For more information on FeatureLight keys, refer to **Using feature keys for network telephone services** on page 356.

When I press numbers on the telephone dialpad, they appear on the telephone display but are not dialed out.

Cause: The Live Dialpad option has been turned off.
Solution: Turn on the Live Dialpad option in the Options List. For more information, refer to **Selecting the dialpad option** on page 239. If this does not solve the problem, disconnect and then reconnect the AC power adapter.

The telephone wobbles.

Cause: The telephone cords aren't routed properly.
Solution: Ensure that the handset cord has been routed in the channel between the stand and the telephone and that the rest of the cords are routed properly through the desk stand. For more detail, refer to **Installing the M9617 telephone** on page 5.

I can't get rid of a call icon in the Personal Call Manager Calls box even though the caller has hung up.

Cause: If you answer a Call Waiting call and your original caller hangs up, the icon of the original caller in the Calls box in Personal Call Manager remains on the screen even though the caller is no longer there. If you select that icon and choose the Release command, the label for the icon changes to "Unknown" but the icon does not disappear.
Solution: The call icon is harmless; it does not affect your call. To prevent it from happening, try to release the original caller before s/he hangs up.

The name of a contact in the Directory is different from the name that appears in the Quick Dials folder.

Cause: A contact entry with the same telephone number is stored in the **My Contacts** folder with a different name. The contacts in the **Quick Dials** folder are always the same as those in the Directory. However, if a contact in the **Quick Dials** folder has the same telephone number as a contact in the **My Contacts** folder, the contact in the **Quick Dials** folder always uses the same name as that in the **My Contacts** folder.

Solution: None.

The Personal Call Manager Calls Log Window takes a long time to appear.

Cause: The Calls Log Window continually adds your incoming and outgoing calls to its log. It has no size limit and will grow indefinitely.

Solution: Delete some of the older entries to make the Calls Log smaller. The smaller the Log, the faster it appears.

The ring configuration setting I chose for a contact in my Quick Dials folder is not working

Cause: The same telephone number you saved in the **Quick Dials** folder is also saved in a memory key on the telephone. You can set ring configuration features for contacts stored in the telephone Directory or **Quick Dials** folder AND for contacts stored in memory keys. If you store the same contact (i.e., the same telephone number) in the telephone Directory or **Quick Dials** folder AND a memory key, the ring configuration settings for the memory key take precedence.

Solution: Specify the ring configuration setting you want in the memory key, or else delete the memory key. For more information, refer to **Specifying Ring Configuration properties for contacts stored in memory keys** on page 155 or **Deleting memory keys** on page 152.

When I export contacts from the Address Book, the resulting text file is incomplete and/or the contact information is jumbled.

Cause: The data for some contacts in your Address Book might contain hard returns (line breaks) or commas. These characters are interpreted in special ways by Personal Call Manager when data is exported.

Solution: Check the **Address Properties** dialog box for each contact to ensure you haven't entered any commas or hard returns in the data fields. If you have, delete the commas or hard returns, and then try exporting. In particular, check the **Phone Number** or the **Address** fields on the **Business** tab of this dialog box (refer to **The Address Properties dialog box** on page 172).

When contacts saved in my Address Book call, the names I entered in my Address Book don't appear (i.e., the Name Matching feature (see page 273) isn't working).

Cause: You entered the dashes in telephone numbers saved in your Address Book.

Solution: Remove the dashes you entered from the telephone numbers saved in your Address Book.

The problem I'm having isn't listed here

If you've read this owner's manual and consulted the Troubleshooting section and still have problems, please call 1-800-574-1611 for technical assistance.

Warranty and Technical Support

Getting warranty or technical support

If you need warranty or technical support, please have the serial number on the back of your telephone and the software version of Personal Call Manager ready before you call. (For information on how to find the software version you have, refer to **The About Personal Call Manager window** on page 75.) Refer to the applicable topic below.

- **Telephone Warranty and Technical Support** on page 423

- **Software Technical Support and Warranty** on page 427

Telephone Warranty and Technical Support

Limited Warranty

Aastra Telecom warrants this product against defects and malfunctions during a one (1) year period from the date of original purchase.   If there is a defect or malfunction, Aastra Telecom shall, at its option, and as the exclusive remedy, either repair or replace the telephone set at no charge, if returned within the warranty period.

If replacement parts are used in making repairs, these parts may be refurbished, or may contain refurbished materials. If it is necessary to replace the telephone set, it may be replaced with a refurbished telephone of the same design and color. If it should become necessary to repair or replace a defective or malfunctioning telephone set under this warranty, the provisions of this warranty shall apply to the repaired or replaced telephone set until the expiration of ninety (90) days from the date of pick up, or the date of shipment to you, of the repaired or replacement set, or until the end of the original warranty period, whichever is later. Proof of the original purchase date is to be provided with all telephone sets returned for warranty repairs.

Exclusions

Aastra Telecom does not warrant its telephone sets to be compatible with the equipment of any particular telephone company. This warranty does not extend to damage to products resulting from improper installation or operation, alteration, accident, neglect, abuse, misuse, fire or natural causes such as storms or floods, after the telephone is in your possession.

Aastra Telecom shall not be liable for any incidental or consequential damages, including, but not limited to, loss, damage or expense directly or indirectly arising from the customers use of or inability to use this telephone, either separately or in combination with other equipment. This paragraph, however, shall not apply to consequential damages for injury to the person in the case of telephones used or bought for use primarily for personal, family or household purposes.

This warranty sets forth the entire liability and obligations of Aastra Telecom with respect to breach of warranty, and the warranties set forth or limited herein are the sole warranties and are in lieu of all other warranties, expressed or implied, including warranties or fitness for particular purpose and merchantability.

Important Power Supply information

Power Supply: 16 V AC, 500mA.

To avoid potential electrical shock hazard or damage to the telephone, use **only** the manufacturer-supplied equipment and installation procedures. Specifically, use only 2 or 4 conductor modular teledapt plug/cords with this product, and an AC transformer that is CSA/UL or CSA-NRTL/C approved Class 2, Level C, rated.

Substitution of non-approved equipment will void the Aastra Telecom warranty. For more information about installation and safety concerns, call 1-800-574-1611.

Warranty Repair Services
Should the telephone fail during the warranty period:

In North America, please call 1-800-574-1611 for further information.

Outside North America, contact your sales representative for return instructions.

You will be responsible for shipping charges, if any. When you return this telephone for warranty service, you must present proof of purchase.

After Warranty Service

Aastra Telecom offers ongoing repair and support for this product. This service provides repair or replacement of your Aastra Telecom product, at Aastra Telecom's option, for a fixed charge. You are responsible for all shipping charges. For further information and shipping instructions:

In **North America**, contact our service information number:1-800-574-1611. **Outside North America**, contact your sales representative.

Note: Repairs to this product may be made only by the manufacturer and its authorized agents, or by others who are legally authorized. This restriction applies during and after the warranty period. Unauthorized repair will void the warranty.

Technical Support

If you've read this owner's manual and consulted the Troubleshooting section and still have problems, please call 1-800-574-1611 for technical assistance.

Software Technical Support and Warranty

Technical Support

For installation and configuration questions, Aastra Telecom provides 90 days of support starting from the date of the first call at no charge.

To receive technical support, call 1-800-574-1611.

END USER LICENSE

SOFTWARE LICENSE AGREEMENT

1.Grant of License

Grant of License from Aastra Telecom Limited ("Aastra"). This document ("Agreement"), is the legal Agreement which will govern the use of the Aastra distributed product called Personal Call Manager software and its associated documentation. That product and documentation is called "Software" in the Agreement.

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You shall not disassemble, decompile, or reverse engineer the Software, or by any other means seek to determine the source code programming comprising the Software. You shall make no more copies of the Software than are reasonably necessary to protect Your information and investment therein.

You shall use any copies You make only for archival purpose and shall keep a record of the location of all such copies. You shall not allow anyone to use the Software except Your employees and /or authorized agents.

4.Limited Warranty

Aastra warrants that for the first ninety days from the date the Software is delivered to You (a) the medium on which the Software is delivered to You shall be free of defects and/or faulty workmanship; and (b) the Software, excluding printed documentation, shall be machine readable by the computer terminal for which it was supplied; and (c) the code contained in the Software shall be executable by the microprocessor of the computer terminal for which it was supplied; and (d) the documentation is substantially complete and contains all information Aastra deems necessary to use the Software.

If the Software should fail to meet the above warranty You should return it and all related hardware that was packaged with the Software, during the ninety day warranty period only, to Aastra or Your Aastra Authorized Distributor for replacement with another copy or for a full refund, at Your option. Such replacement or refund shall be Your sole remedy.

THERE ARE NO OTHER WARRANTIES, EXPRESSED OR IMPLIED PROVIDED WITH THE SOFTWARE. Aastra EXPRESSLY DISCLAIMS THE WARRANTIES OF MERCHANTABILITY AND OF FITNESS FOR A PARTICULAR PURPOSE.

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6.Termination of Agreement

You may terminate this Agreement by returning the Software and destroying all copies, and by returning all hardware components that were packaged with the Software, as provided in paragraph 2. Aastra may terminate this Agreement, and require You to return the Software and destroy all copies, as provided in paragraph 2, if You violate any of the terms and conditions of this Agreement.

7.Entire Agreement

This Agreement constitutes the entire Agreement between You and Aastra with respect to the licensing and use of the Software.

Glossary

Address Book Tree View

The Tree View portion of the Address Book appears on the left of the Personal Call Manager main window, and shows the **My Contacts** and **Quick Dials** folders:

Address Book List View

The List View portion of the Address Book appears on the right side of the Personal Call Manager window, and contains the contacts in the folder selected in the Tree View portion

Comma delimited format

A file that is stored in comma delimited format has a comma between each field, and a carriage return between each record.

A field is a single piece of information, such as a last name.

A record is a collection of fields that make up a single contact, including that contact's name, business number, fax number, and so on.

A carriage return is the character produced by pressing the Enter or Return key.

Contact Icon

Contacts are represented by an icon and a name. Depending on how the icon view is set, contact icons can appear as:

Contacts

A contact is any person or business that you add to the Address Book.

Quick Dials

The **Quick Dials** folder of the Address Book is used to store contacts that you use frequently or need to access quickly. The contacts that you add to the **Quick Dials** folder are automatically added to the **Quick Dials** menu item in the **Calls** menu or the Personal Call Manager task tray menu. (See **The task tray icon** on page 55.)

Right-click

Right clicking (moving the mouse pointer over an object and pressing the right mouse button) will open a menu for most items in Personal Call Manager.

TAPI

TAPI stands for Telephony Application Programming Interface. It provides a graphical computer interface for your 9617 telephone and allows it to synchronize with your computer.

Task Tray

The Personal Call Manager task tray icon is located at the bottom right hand corner of the computer screen as shown below.

Start | Personal Call Manager   9:16 AM

The task tray

When you click on it, the task tray menu appears. This menu is identical to the **Calls** menu.

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