PNM Plus™
Operation Manual
Version 2.1

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Elcotel, Incorporated

6428 Parkland Drive, Sarasota, FL 34243

(941) 758-0389 or (800) ELCOTEL

FAX: (941) 739-7500

— NOTICE —

Elcotel, Inc. reserves the right to make any changes

and improvements in the product described in this

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Introduction

Audience Description

This manual is intended for persons who:

- Plan for and install software in support of public payphone, IPP, COCOT, or COPT companies using Elcotel, Inc. Payphones and PNM Plus.

- Operate and maintain the payphone routes on a day to day basis.

- Generate and analyze reports in order to manage the payphone routes effectively.

This manual assumes:

- Knowledge of the domestic public payphone industry.

- Familiarity with personal computer hardware and software including modems, MS DOS operating system, the Windows operating environment, and peer-to-peer networking.

Applicability

This document applies to the following Elcotel, Inc. products:

- Payphone Network Manager Plus (PNM Plus) Software Version 2.1

- Payphones using operating system software up to and including LP version 5.4 or KX version 1.3.

Purpose

This document provides you with an overview of the product and with step-by-step procedures for the installation and routine operation of PNM Plus software during normal payphone route management.

Related Documents

See the following documents for more detailed information about the specified products:

- *PNM Plus Compact Desk Guide* P/N 3350320

- *PNM Plus DigiBoard Installation Guide* P/N 3350243

This manual may refer to other related product manuals using a generic reference, such as "network management system manual," "firmware operation manuals," or "payphone operation manual." The exact title and part number of these related manuals will vary, depending on the actual network management system, firmware, or payphone product purchased.

Conventions Used in PNM Plus

This section describes the conventions used throughout PNM Plus and throughout this Operation Manual.

Document Conventions

To help you locate and interpret information easily, this document uses consistent visual cues and a standard key combination format. These conventions are explained below.

Convention	Meaning
bold, SMALL CAPS	• Data you need to enter or select from a list • Screen, window, menu, field, and list names • Screen buttons you click on in PNM Plus
italic	• Path names (e.g., ***c:\pnmplus***) • References to another section or document • Literal information (e.g., The number on the screen is a *1*.)
<text within brackets>	Represents keys you press on the keyboard

PNM Plus Conventions

PNM Plus uses conventions described for Microsoft programming.

The following table describes the most frequently used buttons in PNM Plus and the actions that are taken if they are pressed.

Buttons	Keyboard	Action Taken
NEW	\<ALT>+\<W>	Adds new record to the database
DELETE	\<ALT>+\<D>	Deletes record from the database
OK	\<ALT>+\<O>	Saves or Updates information entered and closes window
CANCEL	\<ALT>+\<C> \<ESC>	Closes the window and DOES NOT save the information entered
CLOSE	\<Alt>+\<C>	Closes window and saves all information entered
VIEW	\<ALT>+\<V>	Views the current selection -- Read Only
CHOOSE	\<ALT>+\<H>	Chooses the Highlighted item from list
SELECT	\<ALT>+\<S>	Selects the Highlighted Item from list
DETAIL	\<ALT>+\<D>	Displays Detail information for current selection
CLEAR ALL	\<ALT>+\<L>	Clears current display on the screen and reverts back to default screen
ADD >>	\<ALT>+\<A>	Adds the current selection to the Assigned list
<< REMOVE	\<ALT>+\<R>	Removes the Current selection from the Assigned List

Contacting Elcotel

For further information, or to report a discrepancy in this manual, contact:

<div align="center">

Elcotel, Inc., Customer Service Department
Toll Free: 800-ELCOTEL (800-352-6835)
Office: 941-758-0389
Fax: 941-739-7500

</div>

1. PNM PLUS OVERVIEW

PNM Plus was designed to improve the way you manage and install your payphone network. PNM Plus provides automated support for many of the essential business functions required to successfully manage and maintain a network of intelligent payphones. The built-in features of PNM Plus enable you to:

- Examine the operating conditions and parameters of your payphones

- Transmit operating parameters and rate information to your phones

- Upload key status information from your phones for use in managing the phones

- Establish and manage poll lists to automatically manage your phones

- Maintain important information about the organization of your phone network, including routes, sites, technician assignments, customer names, and contract information

- Record and track problems associated with your phones

- Record and track expenses and revenues associated with individual phones

- Calculate commission payments

The programs that make up PNM Plus have been designed to be user friendly and provide as much flexibility as possible.

1.1 PNM Plus Components

PNM Plus has been designed to operate in a variety of customer environments, including single user and multi-user situations. To provide the flexibility to operate in these diverse conditions, PNM Plus provides you with the ability to install only the portions of the system you will need for specific situations. To make this possible, PNM Plus has been divided into four main components.

These components are:

> **Operator Console**: The Operator Console is the primary user interface to PNM Plus. The Operator Console lets you manage the daily operation of your payphone by providing you with access to the majority of PNM Plus functions. PNM Plus functions include phone management, entry of business information, maintenance of poll lists, tracking of payphone problems, and management of operational files for the payphones.

> **Poll Manager**: The Poll Manager manages the communications functions required to automatically manage your payphone network. The Poll Manager receives and processes all incoming phone calls from your payphones as well as initiating calls to your phones on a scheduled basis. The Poll Manager can handle multiple modem and telephone lines at the same time.

> **Report Generator**: The Report Generator enables you to build management information reports based on your database of payphone information. PNM Plus Version 2.1 may contain an *optional* 32-Bit Report Generator. This allows you to design and print your own custom reports in addition to the standard report types supplied with the basic PNM Plus package.

> **Utilities**: The Utilities module provides the tools necessary to manage the database PNM Plus uses to store information about your payphones. The Utilities include tools to import and export information to or from other applications, tools to purge unnecessary information from the system, tools to clean up existing databases, tools to upgrade existing databases, tools to change the ANI of a group of phones, and tools to merge two existing databases. PNM Plus Version 2.1.0 may include an *optional* Multiple Database Manager utility. This utility can be used to merge configuration and SMDR information from satellite offices into a master (home office) database. It can also download configuration data from the master database to the satellite offices.

See Section 3, *Introducing PNM Plus*, for more information on these components.

Note: *A Conversion utility used to convert PNM files to PNM Plus is included for current PNM users. For information on how to convert PNM files, see Appendix A, Converting from PNM to PNM Plus.*

Each of these PNM Plus components consists of computer programs and files necessary for their function. In addition, PNM Plus maintains its information in a database (a data file) that is shared by all the components of PNM Plus.

PNM Plus must have access to the operational files (registers and options, rates, program, speed dial, and priority parsing files) used with your payphones. Typically, these operational files are stored in the same directory as the PNM Plus database. Access to the database and the operational files is therefore a critical consideration when installing PNM Plus.

To assist in determining how to install PNM Plus in your environment, consider the following guidelines:

Single User installations. To install the system for use by a single user, all components of PNM Plus can be installed in the same directory on a single computer system. See Section 2.1, *Installing PNM Plus Programs*, for instructions on installing PNM Plus.

Multi-user installations. To install the system for use by several users, there are several key considerations:

- *Database location*. The database and other key files, such as Rates, Priority Parsing, Speed Dial, Rep/Card Templates, Voice Brand, and Program files, must be located in a central location accessible by all users and programs. Typically, in a LAN environment, this central location is the LAN server.

- *Single Poll Manager*. The Poll Manager is designed to run in unattended mode and respond to incoming calls from payphones or to scheduled poll list actions recorded in the database. *Only one copy of the Poll Manager can be installed and operated on the LAN*. The Poll Manager must be installed on a workstation with access to the database.

- *Operator Consoles*. Since the primary access to the functions of PNM Plus is provided through the Operator Console, one copy of the Operator Console should be installed for each user in the system.

- *Reports*. Since the Operator Console provides on-line access to much of the information provided by the Reports module(s), it might not be necessary to install the Reports programs on every user workstation. You might consider only installing Reports for the few users who need to print accounting, commissions and other administrative information.

- *Utilities*. While Import, Export, Purging, Cleanup, Change ANI, Upgrade, Phone Acquisition Merge, and the optional Multiple Database Manager are important functions, you should consider installing the Utilities functions only for employees who are responsible for these functions.

Note: *Backup and Restore functions are provided by your PC Operating System. It is very important that you make a backup copy of all of the key files and programs used by your system.*

1.2 System Requirements

You will achieve optimum performance when PNM Plus is installed on a computer system having the following minimum requirements:

- Computer Type .... IBM or Compatible
- Processor Type.. 486 or larger, 33 MHz or faster (Pentium or compatible 200 MHz recommended)
- Free RAM.. 8 MB (16 MB recommended, if you are running 32-bit Reports)
- MS DOS .... 6.2 or higher
- Microsoft Windows .... 95, 98 or NT
- CD ROM Drive 4X
- Monitor... VGA Color (800 x 600 pixels resolution)
- Hard Disk.. 12 MB free[1]
- Printer (recommended but not required) .... Laser or Dot Matrix
- Modem.. 1200 baud or greater for Series5/5501 phones. 2400 baud or greater for KX-5502 phones. (Hayes Accura 28.8 or US Robotics Sportster 33.6 modems are recommended).
- Phone Line... B1 type with NO other equipment or features (e.g., telephones, call-waiting, FAX Machines)
- Mouse .... Required (Microsoft mouse recommended)

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1. If you are converting from PNM and FACTS, you need an additional 1.5 times the space that these two directories use. Using the 32-bit enhancements also causes a small increase in required disk space.

1.3 How to Get Help

We want you to be successful with your use of PNM Plus; therefore, Elcotel provides several levels of assistance should you require help in operating and installing PNM Plus.

These levels include the following:

Operation Manual   This operation manual provides instructions for using the functions provided by PNM Plus.

Compact Desk Guide   The Desk Guide provides step by step instructions for frequently used PNM Plus functions.

On-Line Help   PNM Plus contains an on-line Help facility that explains the features and functions provided with the system. If you have used help systems in other Windows programs (or in Windows itself), you are ready to use PNM Plus help system. You can activate the on-line Help by selecting **HELP-CONTENTS** from the PNM Plus menu bar or by clicking on the **GENERAL PROGRAM HELP** icon at the PNM Plus toolbar.

You can find additional information on the Windows help system in the documentation you received with Microsoft Windows. The PNM Plus On-Line help system is an indexed help system. The hierarchy of indexes is designed to help you target your topic of interest. Using the indexing system, you can select a broad topic of interest from the first index and then refine your selection using the next indexes that appear.

Context Help   Context sensitive help gives you immediate information about a screen element of interest, such as a text entry field or command button. You can activate Context help by placing your cursor on the area you want help information on and then pressing <F1>.

Bubble Help   Bubble Help provides you with an on-screen definition of any PNM Plus element you point to with your cursor. You can activate Bubble help by clicking on the **WHAT IS IT** icon at the PNM Plus toolbar.

Customer Service   Call 1-800-ELCOTEL to contact your Elcotel Customer Service Representative for assistance.

ReadMe File   This is a text file that accompanies the product containing any possible late breaking information about PNM Plus.

PNM Plus Training   Elcotel provides hands-on, intensive training for novice and experienced payphone users. The training covers all aspects of PNM Plus and provides the opportunity to install, configure, and operate the system in Elcotel's training facility. Call Elcotel for training information.

2. GETTING STARTED

Before you can begin using PNM Plus, you need to perform the following tasks:

• Install the PNM Plus group of programs.

• Run the conversion or upgrade program, and if necessary, configure the communication port and modem.

The following sections discuss each of these tasks.

2.1 Installing PNM Plus Programs

The installation procedure presented in this section applies for new installations and for installation upgrades to Windows 95, 98, and NT operating systems. If you are installing an upgraded version of PNM Plus, you also need to upgrade your PNM Plus databases. See Section B.7, *Upgrading PNM Plus Databases*, for information on how to upgrade your PNM Plus databases.

Note: *To install the Conversion utility, see Appendix A, Converting from PNM to PNM Plus. To install the Multiple Database Manager utility, refer to Appendix B, Using the PNM Plus Utilities.*

The installation process includes installing a CD-ROM or a set of diskettes that loads the following components:

• Operator Console

• Reports (including the 32-Bit Report Generator, if applicable)

• Poll Manager

• Utilities

• PNM Plus Database

• Help Files

In addition to installing the PNM Plus components, the setup program enables you to select the appropriate database sources for each of these programs and for the peripheral devices (e.g., modems) necessary for their operation.

Upon completion of the SETUP program, you might be prompted to edit your AUTOEXEC.BAT, CONFIG.SYS, and SYSTEM.INI files**.** You do not need to use an editor to make the changes specified by the SETUP programs, as your SETUP takes care of these changes for you. As a preventive measure, the SETUP program also creates a backup file for each of the files modified. Please take note of the name of the backup files.

CAUTION

Before you install PNM Plus, you must close all other applications that are open. For example, a toolbar appearing on your screen might indicate that MS Office is open. Make sure you close the toolbar before you install PNM Plus.

1	Set up your system before installation. Insert the PNM Plus CD-ROM (or the first diskette) into the appropriate drive.		
2	Click on **START**, click on **RUN**, then enter **D:\Setup.exe** (use the appropriate drive letter).	**Note:**	*If you are running Windows 98 and using a "wheel" mouse, you may experience a fatal error when you try to run Setup. If this happens, press CTRL-ALT-DEL, select MSWheel, and click on End Task. Then press CTRL-ALT-DEL again and make sure MSWheel is no longer on the list. If it is still there, select it again and click on End Task. Continue this process until MSWheel no longer appears on the list. If you cannot end the MSWheel task after several attempts, you can instead reboot the computer in Safe Mode and run Setup.*
3	Complete the **WELCOME** screen.		
	• Review the **WELCOME** screen.		
	• Ensure that you do not have any Windows program currently running, including the MS Office toolbar.	**Note:**	*The PNM Plus Setup screens contain a **BACK** button you can use to modify earlier options.*
	• Click on **NEXT** to begin the setup.	The **USER INFORMATION** screen appears.	
4	Complete the **USER INFORMATION** screen.		
	• Enter your Name, Company, and Serial Number (found on label of distribution diskettes) in the appropriate fields.		
	• Click on **NEXT**.	The **CONFIRM REGISTRATION** screen appears.	
	Click on **YES** to confirm the registration information or **NO** to re-enter it.	When you click on **YES**, the **SELECT COMPONENTS TO INSTALL** screen appears.	

5 Complete the **SELECT COMPONENTS TO INSTALL** screen.

• Select the components you want to install (the check box preceding the components is selected), and clear the components you do not want to install (the check box preceding the components is not selected).

The amount of memory each component requires is listed to the right of the component.

CAUTION: *If you already have PNM Plus installed, the database component is not selected. If you select it, the new database you are installing replaces your existing database. All information in your existing database will be deleted.*

Note: *If you wish to use the PNM Plus 16-bit Reports on this PC, you must select* **Reports***, even if they were installed before. Software changes have occurred.*

Note: *If you are installing the PNM Plus 32-bit Reports or Multiple Database Manager option, you must select the appropriate item from the list. These will install after the main PNM Plus installation program has completed.*

• Select the Destination Directory to change the directory where Setup installs the product:

The default directory where PNM Plus is to be installed is on the same drive as Windows, with the directory name of PNMPLUS (i.e., *C:\PNMPLUS*).

  • Click on **BROWSE**.

The **CHOOSE DIRECTORY** screen appears.

  • Locate the destination for the PNM Plus database by selecting the drive from the **DRIVES** drop down list and then double-clicking on the appropriate directory in the **DIRECTORIES** box.

  • Click on **OK**.

The **SELECT COMPONENTS TO INSTALL** screen reappears with the directory you selected listed in the **DESTINATION DIRECTORY** box.

Below the **DESTINATION DIRECTORY** box, the **SELECT COMPONENTS TO INSTALL** screen shows you the space required to load the components you selected.

• If you need to change the drive where you are going to install the components, click on **DISK SPACE**.

The **AVAILABLE DISK SPACE** screen enables you to change the drive from the **DRIVE** drop down list. The **SPACE** window displays the amount of space available in the selected drive.

• Select a drive from the **DRIVE** drop down list and then click on **OK**.

Returns the **SELECT COMPONENTS TO INSTALL** screen with the space available in the selected drive.

When the components you want to load are selected and the desired Destination Directory is displayed, click on **NEXT**.

If you have not yet created the directory displayed in the **SELECT COMPONENTS TO INSTALL** screen **DESTINATION DIRECTORY** box, the **CONFIRM NEWLY SELECTED DIRECTORY** screen asks if you want the Setup program to create the directory. Click on **YES** to create the directory.

After you click on **NEXT** at the **SELECT COMPONENTS TO INSTALL** screen or **YES** at the **CONFIRM NEWLY SELECTED DIRECTORY** screen, the **CONFIRM DATABASE DIRECTORY** screen displays the directory where the Setup program will copy the PNM Plus databases.

6 Click on **NEXT** to accept the default directory as the directory where the PNM Plus databases are to be copied.

If you want to change the directory where the PNM Plus databases are copied, click on **BROWSE** and select a new directory.

If you have not yet created the directory displayed in the **CONFIRM DATABASE DIRECTORY** screen, the **CONFIRM NEWLY SELECTED DIRECTORY** screen asks if you want the Setup program to create the directory for you. Click on **YES** to create the directory.

After you click on **NEXT** at the **CONFIRM DATABASE DIRECTORY** screen or **YES** at **THE CONFIRM NEWLY SELECTED DIRECTORY** screen, the **SELECT PROGRAM FOLDER** screen appears.

7 Select a Program Folder.

• To accept PNM Plus as the Program folder where the **PNM PLUS** icon will be placed, click on **NEXT**.

To change the Program folder where the **PNM PLUS** icon will be placed, click on one of the existing folders.

8	Perform the Setup Process.	*(Floppy Installations Only)* As the Setup process requires the following diskette, it prompts you to change the floppy and insert the next diskette. Click on **OK** when the displayed path is where your installation files are located.
		Note: *You can change the path by clicking on **BROWSE** and selecting the directory where the installation files are located.*
		(All Installations) During the Setup process, the PNM Plus setup copies the program files and all dynamic link libraries (files with DLL extension). Status bars (from left to right) indicate current file progress, current floppy progress (if applicable), and hard drive space remaining. The LOW indicator lights up if less than 5% of the total hard drive capacity is free. The horizontal progress indicator indicates overall progress of the installation process.
		Note: *If a file to be modified is found to be open or in use during installation, the Setup program prompts you to Retry the copy, Ignore the copy statement, or Abort the copy. Use your <Alt-Tab> key combination to display the open file, close the file, return to the Setup program, and then Retry the copy.*
9	Perform the 32-Bit Report Setup Process.	**Note:** *If you did not select the 32-Bit Report option for installation, skip this step.*
	• At the **WELCOME** screen, click on **OK**.	
	• Click on the **INSTALL** button to begin installation.	
	• Choose a program folder where the **32-BIT REPORT** icon will be placed and then click on **CONTINUE**.	If you do not select a program folder, the **32-BIT REPORT** icon will be placed in the PNM Plus program folder. To change the program folder where the **32-BIT REPORT** icon will be placed, click on one of the existing folders.
	• PNM Plus will install the 32-Bit Report component and alert you when installation is complete. Click on **OK**.	**Note:** *If you are running Windows 95, you may get the following error message when installing 32-Bit Reports: "Unable to load C:\Program Files\Common Files\System\Ole DB\Msdadc.DLL to register it." To correct this error, you have two options: You can install a version of Internet Explorer 4.0 or later from Microsoft, **OR** you can install the dcom95.exe program included on your PNM Plus installation CD. Once dcom95.exe or Internet Exploere 4.0 or later is installed, you need to reinstall 32-Bit Reports.*

10	Perform the MultMgr Setup Process.	**Note:**	*If you did not select the Multiple Database Manager option for installation, skip this step.*
	• At the **WELCOME** screen, click on **OK**. • Click on the **INSTALL** button to begin installation. • PNM Plus will install the MultMgr component and alert you when installation is complete. Click on **OK**.		For information on installing this option after you have installed PNM Plus, see Section B.9.1, *Installing the Multiple Database Manager*.
11	Modify the Setup Files.		To ensure proper operation of PNM Plus, the CONFIG.SYS and AUTOEXEC.BAT files might need to be updated. If they do need updating, a **MODIFY** screen appears. To proceed with the default choice of allowing the Setup to modify the files, click on **NEXT**.
			You can also Save the required changes to the new files or proceed without making any changes to each of these files. In case of any doubts, it is advisable that you Save the required changes to the new file or let the Setup modify the current file. If you allow the Setup to modify the current file, a backup copy of the original file is created.
12	View the **READ ME** Notes.		It is important that you view the Release Notes File. This is where any possible late breaking information about the PNM Plus product will be located.

13 Complete the Setup.

Upon successful installation of PNM Plus, you have to restart your computer from the **SETUP COMPLETE** screen to cause the modifications in the CONFIG.SYS, AUTOEXEC.BAT, and SYSTEM.INI to take place.

• If you have not made changes to the AUTOEXEC.BAT or CONFIG.SYS files, restart Windows by clicking on **YES, I WANT TO RESTART WINDOWS NOW** and then click on **FINISH**.

If you select this option and have not exited all open applications as advised, they are terminated for you.

• If you have made changes to the AUTOEXEC.BAT or CONFIG.SYS files, restart the computer by clicking on **YES, I WANT TO RESTART MY COMPUTER NOW** and then click on **FINISH**.

After you restart Windows or the computer, the Setup program creates the PNM Plus Program Manager Group, which contains the following components. *Figure 2-1*.

Figure 2-1

See Chapter 3, *Introducing PNM Plus*, for information on each component.

Note: *You should make a desktop shortcut to this group. Consult your Windows user's manual for more information on this.*

To restart the computer later, click on **NO, I WILL RESTART MY COMPUTER LATER** and then click on **FINISH**.

2.2 Running the Conversion or Upgrade Program

If you have been using PNM, you need to convert your PNM databases to PNM Plus databases before you can continue. See Appendix A, *Converting from PNM to PNM Plus*, for instructions on running the conversion.

If you have been using a previous version of PNM Plus, you need to upgrade your PNM Plus databases with the databases used by the new PNM Plus you just installed before you can continue. See Section B.7, *Upgrading PNM Plus Databases*, for instructions on upgrading your databases.

2.3 Configuring a Communications Port and Modem

Before you can communicate with your phone through the Operator Console Dial a Phone feature (see Section 5.3, *Dialing your Payphone*), you must ensure that the modem settings and communication port settings are specified correctly.

1	Windows 95, 98, and NT users: Click on **START**, move the mouse to **PROGRAMS**, **PNM PLUS**, then click on **OPERATOR CONSOLE**.	The **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU** appears. *Figure 3-1*.
2	Click on the **DIAL A PAYPHONE** icon [icon] at the PNM Plus toolbar. (See Section 3.1.2, *The Toolbar*.)	The **DIAL PAYPHONE** screen appears. *Figure 5-8*.
3	Click on **MODEM SETTINGS.**	The **MODEM/COMMUNICATIONS SETTINGS** screen appears. *Figure 2-2*. *Figure 2-2*
4	Click on the **COMMUNICATIONS PORT** button (1, 2, 3, or 4) you want to use.	
5	Select the modem type from the **TYPE** drop down list, or select **CUSTOM** if your modem is not on the list.	
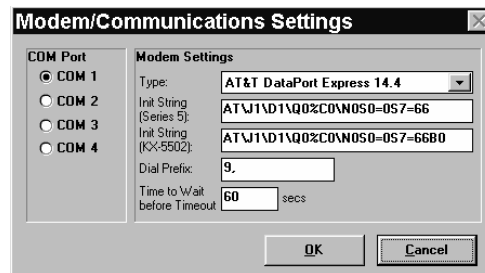
6	In the **SERIES 5 INIT STRING** field, enter the initialization string for the modem used on your Series 5 phones. In the **KX-5502 INIT STRING** field, enter the initialization string for the modem used on your KX-5502 phones.	An initialization string is automatically entered in the **INIT STRING** field if you selected a modem from the **TYPE** drop down list. To shut your modem down when you exit Poll Manager, edit the string by entering the **DISABLE AUTO ANSWER** command (i.e., S0=0).
7	In the **DIAL PREFIX** field, enter the dial prefix required to dial out.	The dial prefix entered in the **MODEM SETUP** screen will be dialed first, followed by the Site Dial Prefix (if any) and the phone ANI.
8	In the **TIME TO WAIT BEFORE TIMEOUT** field, enter the amount of time in seconds that the modem should try calling the phone before aborting the call. The recommended setting is 60 seconds.	
9	Click on **OK**.	The modem settings and communication port settings are specified. Returns the **DIAL PAYPHONE** screen. *Figure 5-8*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.
11	To exit the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**, select **FILE - EXIT**.	Returns the Windows desktop.

2.4 Setting Up 32-Bit Reports

3. INTRODUCING PNM PLUS

As introduced in Chapter 1, the complete PNM Plus system consists of the following separate but functionally integrated components:

- The Operator Console
- The Poll Manager
- The Report Generator(s)
- The Utilities

The following sections provide you with an overview of each component.

3.1 The Operator Console

To access the **OPERATOR CONSOLE,** click on **START**, move the mouse to **PROGRAMS**, **PNM PLUS**, and click on **OPERATOR CONSOLE.**

The **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU** appears (see Figure 3-1).
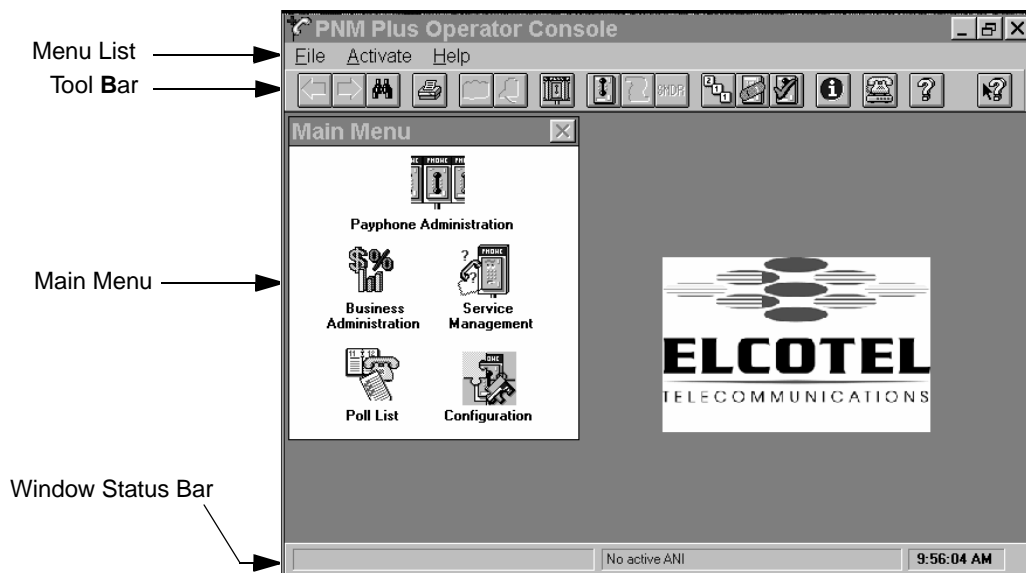
Figure 3-1

This screen provides you with a graphical user interface that enables you to do the following:

- Maintain a database of information about your payphones and the sites where they are installed.
- Review and configure the settings and operational files used by your payphones.
- Set up and manage Poll Lists.
- Review alarms and problems reported by the payphones and your customers.
- Keep track of problems and repairs necessary for your phones.
- Maintain route and technician information.
- Keep track of your customers, contracts, and commission plans.
- Record and manage the revenues and expenses associated with your payphones.

Each component on this screen is described in the following sections.

3.1.1 THE MENU LIST

The Menu List provides you with the following options:

- File
- Activate
- Help

Each of these options is discussed in the following sections.

3.1.1.1 The File Menu

Select **FILE** from the menu list to display the following menu:

This menu provides you with the following options:

- Select **PRINTER SETUP** to select the Printer to use and its options and settings.
- Select **EXIT** to exit the **PNM PLUS OPERATOR CONSOLE**.
- Select **STATISTICS** to display the **STATISTICS** screen (see Figure 3-2).
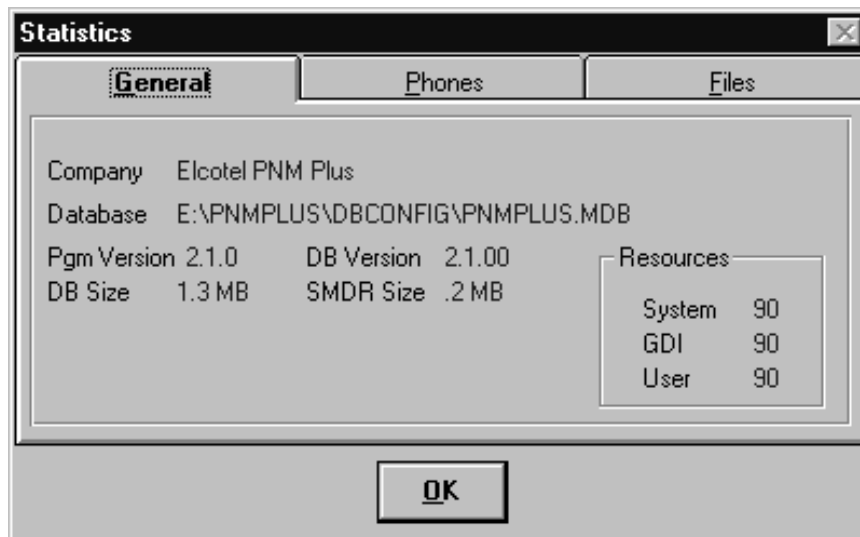
Figure 3-2

Through the **STATISTICS** screen, you can review the number of Customers, Contracts, Phones, Sites, Routes, and Technicians in your database.

3.1.1.2 The Activate Menu

Select **ACTIVATE** from the menu list to display the following menu:
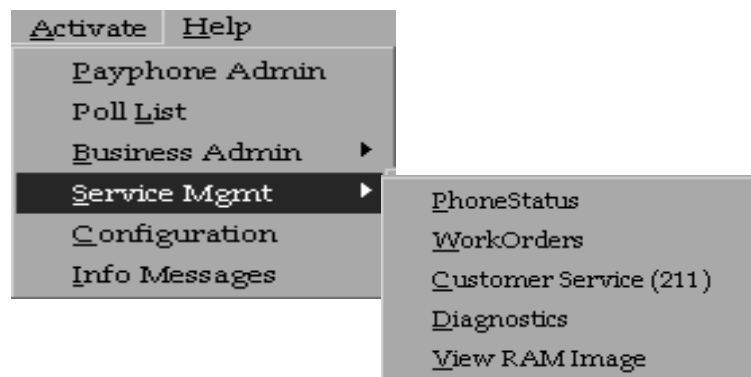
This menu enables you to activate the different functions of PNM Plus: Payphone Administration, Poll List, Business Administration, Service Management, Configuration, and Informational Messages, as well as the functions contained within these. For example, the preceding figure displays the functions associated with Service Management.

3.1.1.3 The Help Menu

Select **HELP** from the menu list to display a **HELP** menu with the following options:

- Contents
- About PNM Plus

If you select **CONTENTS**, the **PNM PLUS HELP** screen appears (see Figure 3-3).
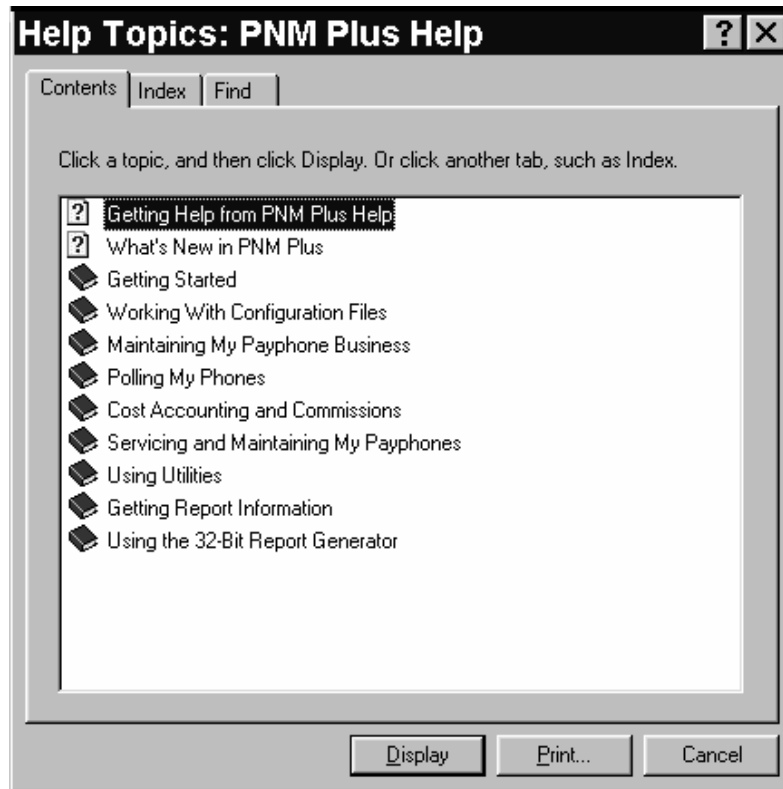
Figure 3-3

If you select **ABOUT PNM PLUS**, the **PNM PLUS ABOUT BOX** screen appears (see Figure 3-4).
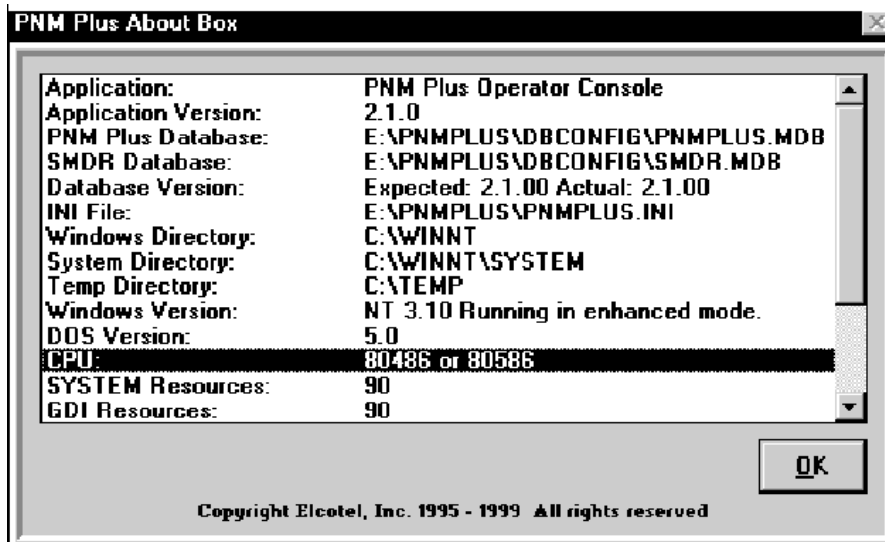
Figure 3-4

This screen enables you to view information about PNM Plus, such as the Version number, License number, and resource utilization percentages.

3.1.2 THE TOOLBAR

The toolbar provides you with rapid and easy access to a variety of PNM Plus functions.

To use a Toolbar function, click on the desired icon.

Note: *Sometimes the Toolbar icons are not useful with certain functions. In such cases, one or more icons might be grayed out to indicate they are not active.*

The following table displays the icons on the toolbar and explains their functions.

Buttons	Function
	Scans through lists of data at the **NAVIGATION** and **DETAIL** screens. At the **NAVIGATION** screen, these buttons enable you to select an item from the list box and view information on the selected item. At the **DETAIL** screens (e.g., **PHONE DETAIL** screen), these buttons enable you to view detail information on each item (e.g., phone) in your database.
	Finds a payphone in the database based on <u>A</u>NI, Site <u>N</u>ame, or <u>P</u>hone ID.
	Prints current screen display.
	Enables you to copy and paste an existing record. This is useful if you want to create a new record based on an existing record.
	Starts the Payphone Administration function and displays payphones, sites, routes, customers, and technician information.
	PHONE DETAIL - Displays detail for a selected phone. **PHONE CONTACT HISTORY** - Displays alarm and status information for a selected phone.
	Displays SMDR records collected for a selected phone.
	211 -- Displays support screen for 211 or Customer Service calls. **VIEW WORK ORDER MAINTENANCE** - Displays work order maintenance. **VIEW PHONE STATUS FROM LAST POLLING** -- Displays phone status from last polling.
	Displays information messages generated by PNM Plus or Poll Manager. These messages alert you to events that have occurred, such as a phone home event. These messages also tell you if Poll Manager is open and the results of running Poll Manager. The status bar of the program you are running alerts you when a message is received.
	Dials a Payphone.
	ON LINE HELP - Activates the on-line help facility. **WHAT IS IT** -- Activates Bubble Help. See Section 1.3, *How to Get Help*.

3.1.3 THE MAIN MENU

The **MAIN MENU** provides you with access to the functions provided by the **OPERATOR CONSOLE**. The **MAIN MENU** consists of icons that enable you to access submenus you can use to perform these functions. The **MAIN MENU** functions include:

- Payphone Administration
- Business Administration
- Poll List Maintenance
- Service Management
- Configuration Management

To access a function within the Operator Console, select the corresponding **MAIN MENU** icon or use the accelerator key associated with the desired function. Each of these functions is described in the following sections.

3.1.3.1 Payphone Administration

Payphone Administration includes all phone database administration, including all payphone and associated site, customer, contract, technician, and route information.

Payphone Administration enables you to:

- Enter and modify information about your payphones.
- Maintain information about the sites where the phones are installed.
- Assign and modify Register and Options settings for your phones.
- Assign sites and phones to routes.
- Maintain information about your technicians, including access numbers and route assignments.

3.1.3.2 Business Administration

Business Administration includes all data relating to the Customer and related Contracts, Commissions, and account management.

Business Administration enables you to:

- Enter and maintain information about your Customers, including names, addresses, and telephone numbers.
- Record information about the Contracts for your phones.
- Record and track expenses and revenues associated with individual payphones.
- Maintain commission plans and formulas for calculating commission amounts.
- Calculate commissions based on selected payphone expenses and revenues.
- Create and edit tables for Estimated Tax Liability.
- Create and edit tables for Estimated Local and Long Distance Carrier Expenses.

3.1.3.3   Poll List Maintenance

Poll List Maintenance includes definitions of poll list commands, phones, and scheduling of polling.

Poll List Maintenance enables you to:

- Create Poll Lists that perform updates or collect information from your payphones.
- Determine the dates and times the lists will be performed by the Poll Manager.
- Review and change the list of phones on a Poll List.

3.1.3.4   Service Management

Service Management includes payphone servicing, Customer complaint management, and the help desk.

Service Management enables you to:

- View reported alarms from your payphones.
- View lists of phones that could not be contacted during polling.
- View the history of contact information (alarms and call counts) for each payphone.
- Open work orders and track repair actions necessary to resolve maintenance problems.
- Record Customer complaints and refund requests.
- View diagnostic information collected from your payphones.
- View the RAM Image of operational files downloaded from your phones.

3.1.3.5   Configuration Management

Configuration Management enables you to configure your PNM Plus system to your needs.

Configuration Management enables you to:

- Edit Register and Option templates.
- Edit Rate files.
- Create and edit Speed Dial files.
- Create and edit Priority Parsing files.
- Create and edit Repertory Dialer and Credit/Debit Card templates (KX-5502 phones only).
- Create and edit Scrolling Messages Templates (KX-5502 phones only).
- Create and edit custom call processing macros for your payphones.
- Make changes to a group of phones.
- Customize the operation of your system.
- Make changes to all rate files (via the Global Rates Editor).

3.1.4 THE STATUS BAR

Loaded database for MY COMPANY INC   (204) 555-4688 Unassigned Site-OUTSIDE   11:30:13 am
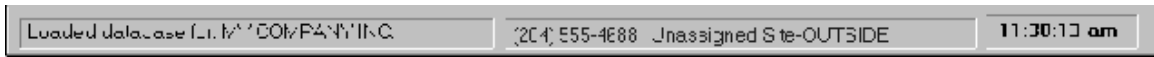
The Status bar provides you with information about the system's operation. The Status bar has three components:

- **System Messages**

  At system startup, the left box displays the location of the current database selection for the selected company. After you have accessed the system, the left box posts system messages received from the Poll Manager or other Operator Console workstations.

- **Current Payphone**

  As you move about in the system from window to window, the system displays or performs a function on a selected payphone. To verify you are performing the function on the correct payphone, the middle box displays the telephone number of the Current Payphone and the payphone location.

- **Current System Time**

  The current system time always appears in the right box.

3.2 The Poll Manager

The Poll Manager is responsible for contacting your payphones and uploading and downloading information. The Poll Manager is also capable of receiving calls initiated by payphones in response to alarm conditions or local telemetry requests. Information obtained during information exchanges with the payphones is stored in the database for use by other PNM Plus applications.

The Poll Manager operates by managing all polling processes for all Poll Lists defined in the Operator Console. The Poll Manager runs separately from the Operator Console, but requires the poll list data that is entered through the Operator Console.

The management functions in Poll Manager include:

- Configuration of the serial ports connected to modems.

- Configuration of the Poll Manager System.

- Poll List Information on-line display, including description and status of the poll lists and the status and progress of the communications to the phones in the poll lists.

With the Poll List functions, you can start, pause, or resume a specified poll list or stop all the polling. In addition, you can view and modify the command set and schedule for any of the poll lists. You perform these functions from the **POLL MANAGER** screen.

To access the **POLL MANAGER**, click on **START**, move the mouse to **PROGRAMS**, **PNM PLUS**, and click on **POLL MANAGER**.

Note: *To operate the Poll Manager, you need (at a minimum) one modem that can transmit at 1200 baud. This modem needs to be connected to one of your serial communications ports.*

The Poll Manager screen appears and is divided into two display windows and a function menu, as shown in Figure 3-5.
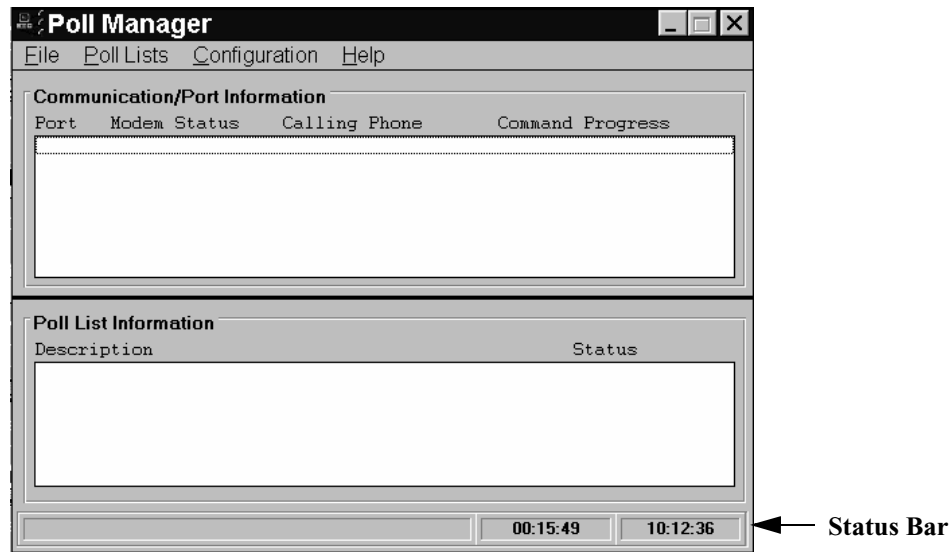
Figure 3-5

The top window shows all currently active communication ports, the status of the attached modems, the ANI of the phone being contacted (if any), and the progress of the modem's current phone call. The second window displays a sorted list of all poll lists in the PNM Plus database. For each list, the description of the poll list and the status of the Poll Manager processing are displayed.

The bottom of the Poll Manager screen contains a status bar. The left side of the status bar displays startup routines and indicates when SMDR is being imported into the database. The startup message displays before the event takes place so that if an error occurs, you know what Poll Manager was attempting to do when the error occurred. The right side displays the running time of this session, and the actual time according to the PC.

The function menu contains a **FILE** menu, **POLL LIST** menu, **CONFIGURATION** menu, and **HELP** menu. The options under each of these menus are:

Menu	Options
File	**Exit** -- Exits the Poll Manager application
Poll Lists	**Stop All Polling** -- Stops all polling currently active. **Pause List** -- Pauses the poll list after the current phone is polled. **Resume List**- Resumes polling from the last phone polled. **Start Polling This List**- Starts the selected poll list. **Show List Progress** - Displays the phones in the poll list and the communication status between the poll list and phones: how many phones are pending contact, how many have been contacted successfully, and how many have been contacted unsuccessfully. **View Commands on this List** - Displays the commands selected for the poll list. You can also activate or deactivate any of the commands for the current poll list selection. **View Schedule of this List**- Displays the schedule for the selected poll list. You can also modify the schedule of the current poll list selection.
Configuration	**Modem Setup** -- Enables communication ports for polling and defines the modem port. **System Settings** - Enables you to change the number of re-dials and the time interval between them, define the last date for historical polling logs, and print alarm information. You can also select Series 5 or KX phones.
Help	**Contents -** Displays a figure of the Poll Manager screen with hypertext links and hotspots for the screen's menus and windows. **About Poll Manager** -- Displays an About Box similar to the one in Section 3.1.1.3, *The Help Menu*.

For information on configuring the Poll Manager, see Section 7.1, *Configuring the Poll Manager*, and Section 7.2, *Advanced Poll Manager Installation*. For information on maintaining and using poll lists to communicate with your payphone, see Section 5.1, *Poll List Maintenance*, and Section 5.2, *Controlling Poll Lists*.

3.3 The PNM Plus Report Generator

Note: *The optional 32-Bit Report Generator is discussed in Section 3.4. The following information discusses the standard (16-bit) PNM Plus Report Generator ONLY.*

The PNM Plus Report Generator consists of a collection of report templates used to display payphone information in a comprehensive fashion. PNM Plus Reports processing can be performed at any time. You can also schedule reports to be run on any day and time that you desire.

Note: *Until you have entered data and polled phones, most reports are of little use.*

You have the ability to specify many controls for each report. By entering the available control parameters in different combinations, you can select which records are used to build the report. Some controls are generic and apply to all reports, such as a date range to include or a range of payphone ANI's to use. Other controls are specific to each report.

When you run a report, you can select the destination of the report to be the PC monitor, a file, or a printer. The print options include printing all or selected pages of the report to the current printer selection.

To access the **REPORT MANAGER**, click on **START**, move the mouse to **PROGRAMS**, **PNM PLUS**, and click on **REPORT MANAGER**.

3.3.1 RUNNING A REPORT

The following table lists the reports that are available to you with the standard PNM Plus Report Generator module. See Appendix C, *Description of Reports*, for a description and sample of each report.

Report Name
1. Hit List by Route
2. Did Not Report by Route
3. Contacts by Day - One Month - by Route
4. Totalizer Delta Selections by Route
5. Hit List Tickets by Route
6. Work Order Reports by Route
7. Phone Master Report by Route
8. Seven Day History by Route
9. Actual vs. Reported Coin by Route
10. Seven Day Exceptions Only by Route
11. Cashbox Nearing Full by Route
12. User Configurable Report
13. Contact Report by Route
14. Hit List for Laser -- Landscape
15. SMDR Dial Around by Route
16. Cost Accounting Report by Route
17. SMDR Summary by Category by Route
18. Operational Files Exceptions
19. Phone Master Report by Map Code
20. Destination Numbers by Route
21. SMDR Summary by Hour
22. Contact Report by Customer
23. Cost Accounting by Customer
24. Create/Post Coin Accruals
25. Totalizer Delta by Customer
26. Missing Account Code Entries
27. Commission Statements
28. Custom List/Stickers of Phones
29. SMDR Summary for Coin Calls
30. Reason Terminated Report
31. Charged Rates Estimates
32. Tax Responsibility Estimates

1	Click on **START**, move the mouse to **PROGRAMS**, **PNM PLUS**, then click on **REPORTS**.	The Reports **MAIN MENU** appears. *Figure 3-6.*

Figure 3-6

> **Note:** *You can click on **HELP** to access online help information for Reports.*

2	If you want to schedule reports to run on a specified day and time, click on the **ENABLE AUTOMATIC REPORTS** check box.	You can schedule when you want a report to run by creating a template for that report. Creating a report template is discussed in Section 3.3.2, *Controlling Report Contents*.
3	Click on **DATABASE**.	The **SET DATABASE LOCATION** screen appears. *Figure 3-7.*
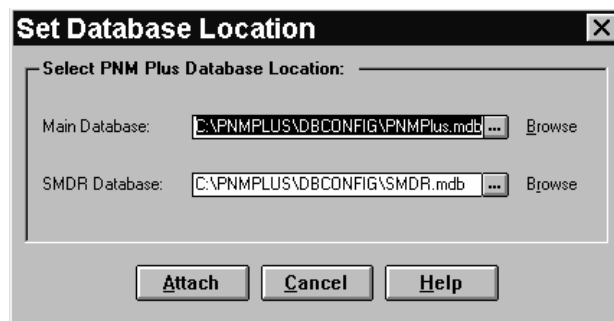
Figure 3-7

4	In the **MAIN DATABASE** field, enter the name of the PNM Plus database that contains the data to be included in your report.	If you do not know the name of the database, click on the **BROWSE** button next to this field and select the database.

5	In the **SMDR DATABASE** field, enter the name of the SMDR database that contains the data to be included in your report.	If you do not know the name of the database, click on the **BROWSE** button next to this field and select the database.
6	Click on **ATTACH**.	The Report Generator attaches links to the database you selected. Returns the Reports **MAIN MENU** screen. *Figure 3-6*.
7	Select the report you want to create from the screen's **REPORT SELECTIONS** list box.	A description of the report appears in the **REPORT DESCRIPTION** field.
8	Click on **RUN.**	A screen appears that enables you to select the information to be included in your report. See Section 3.3.2, *Controlling Report Contents*.

3.3.2 CONTROLLING REPORT CONTENTS

You can control which records are selected for processing on a report and the report format by using that report's control screen. These screens vary from report to report, but contain a combination of one or more of the following sections. Additional information is included in the description of each report in Appendix C, *Description of Reports*.

3.3.2.1 Templates

You use this section to create a template for the selected report. When you create a template, the parameters you define in the report selection screen are used each time you run the template. Define the parameters of the template by setting all the options, then click on **SAVE**. Once you click on **SAVE** and name the template, you can schedule when you want the report to run by clicking on **SCHEDULE**. The **TEMPLATE SCHEDULER** screen appears (Figure 3-8).
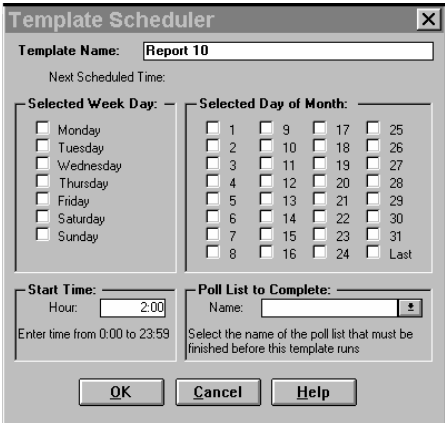
Figure 3-8

You can schedule the report to run on a specific day (on a specific day of the week or month) and time so you do not have to do it manually. You can also schedule the report to run after a specified poll list has been run if you want to ensure the information in the poll list is included in the report. After you have scheduled when your report is to run, click on **OK** to return to the selection screen. Once you have created and saved your template, you can access it from the **TEMPLATES** drop down list.

You can view and edit your templates by clicking on **TEMPLATES** at the Reports **MAIN MENU**. This displays the **REPORT TEMPLATES** screen. See section 3.3.3, *Working with Templates*, for information on this screen.

3.3.2.2 Select records where

You use this section to indicate the records you want to include in the report based on the range of routes, sites, ANIs, and Notes you specify. (Some selection screens might have additional fields.) If you do not complete any of the fields in this section, all records in the database are processed. If you complete multiple fields, they are processed using an *AND* relationship.

For example, if you enter Routes to be between *001* and *005* and Sites to be between Store *A* and Store *B*, the printed report includes records with routes between *001* and *005* AND sites between stores *A* and *B*.

3.3.2.3 Include data that shows that

You use this section to enter the report-specific selection criteria. These vary from report to report. When used, they are processed using an *OR* relationship.

For example, you can select all phones with any alarm turned on *OR* with a Cashbox amount greater than $135.00 *OR* with a totalizer change less than $30 *OR* that has not had any contact since a specific date and time.

For some reports, if you choose to include phones with the alarm turned on, you can select alarms you do not want included. To do this, select the **BYPASS THESE ALARMS** check box and then select the alarms from the drop down list you want to bypass.

If you want your selection criteria to include a range of user-defined site variables, phone variables, or group codes, click on the **VARIABLES** button. The resulting **USER VARIABLES** screen enables you to select records where the site variables, phone variables, or group codes fall within a range that you specify.

3.3.2.4 Select detail levels

You use this section to indicate how you want to organize your information. Depending on your screen, you can select one or more of the following:

- Display the full detail of a record.

- Display the total number of ANIs within a particular site that are included in the report.

- Display the total number of sites within a particular route that are included in the report.

- Display the total number of routes that are included in the report.

3.3.2.5 Output to

This section lets you specify where the report output is to be directed. If you output to a printer or a file, no on-screen preview is done. If you output to the screen, you can view the report on the screen and then redirect the output to a printer or file.

If you select **PRINTER**, you can format how the report is going to look by clicking on the **SETUP** button. This displays the **PRINT SETUP** screen, where you can define the report characteristics.

One of the options you can choose from the **PRINT SETUP** screen (if you have FaxWorks® 3.0 running on your PC) is to fax your report to wherever you want. To fax a report, click on the **SPECIFIC PRINTER** radio button and then select **FX-WORKS** from the drop down list. When you click on **OK**, the **FAX SETUP** screen appears. This screen enables you to enter the phone number of the fax machine you want to call or to enter the name of the recipient if you have FaxWorks® Phone book set up. Click on **OK** to begin the fax transmission. Refer to your FaxWorks® manual for more information.

If you select **FILE**, you can determine the report's format by clicking on the **SETUP** button. This displays the **OUTPUT FILE** screen, where you can select the report to be output in Microsoft Excel, rich text format, or MS DOS text. You use the **OUTPUT FILE** screen **FILENAME** field to enter the file where the report is to be output, or you can click on the button to the right of the **FILENAME** field and select the file from the directory listing.

3.3.2.6 Report Version
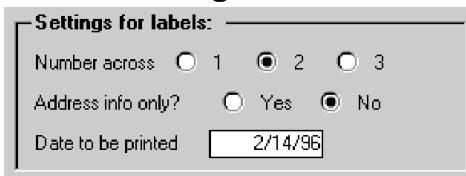
For reports 7, 19, and 28, this section enables you to display your report in one of three versions. The **NORMAL** version displays all the information relevant to that report with titles and blank lines between routes and sites. The **COMPRESSED** version includes the same information as the **NORMAL** version but does not include the titles or blank lines. The **LABELS** version prints information about each ANI on a 1" by 4" label, which can be used to label file folders or to aid in cashbox accounting.

3.3.2.7 Settings for labels
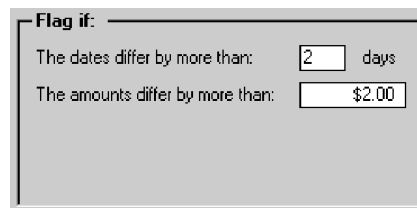
If you select the **LABELS** version in the Report version section of reports 7, 19, and 28, the **SETTINGS FOR LABELS** section enables you to select how many labels you want to appear in a row, whether you want to only include address information, and the date you want to be printed on the label.

3.3.2.8 Flag if
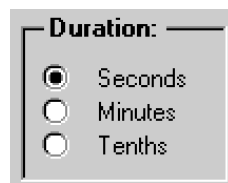
In report 9, this section enables you to flag a record in the report if the dates differ by more than a specified number of days (i.e., 2) or if the amounts differ by more than a specified amount (i.e., $2.00).

3.3.2.9 Duration

In reports 15, 17 and 21, this section enables you to select a unit for the SMDR duration in seconds, minutes, or tenths of minutes. For example, a call that lasted 37 seconds can display as 37 seconds, .7 minutes, or 1 minute.

3.3.3 WORKING WITH TEMPLATES

After you create a template at a report selection screen (see Section 3.3.2.1, *Templates*), you can view information on the template and edit the template by clicking on **TEMPLATE** at the Reports **MAIN MENU**. This displays the **REPORT TEMPLATES** screen (see Figure 3-9).
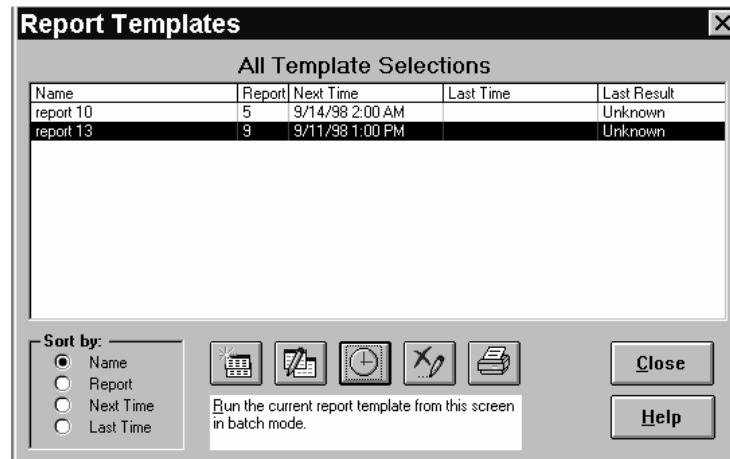
Figure 3-9

The top half of this screen displays information about templates you have created, including the number of the report it is associated with, the next time the template is scheduled to run, the last time it ran, and the result of the last time it ran.

If you have more than one template, you can select how you want the templates to be listed in this screen by selecting a radio button from the **SORT BY** window. You can sort the templates in alphabetical order by the names of the reports, in numerical order by report number, in sequential order by the next time the templates are scheduled to run, and in sequential order by the last time the templates were run.

This screen also provides you with five picture buttons that enable you to copy, modify, schedule, delete, and run the selected template. When you move your cursor to a button, a description of that button appears in the window beneath the buttons.

After you are done using this screen, click on **CLOSE** to return to the Reports **MAIN MENU**.

3.3.4 WORKING WITH REPORT OUTPUTS

When you run a report, you can display the results on your PC monitor. Controls on this screen let you manage the disposition and display of the output data.

Following is a list of the controls available on this screen:
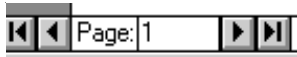
	Provides you with VCR-type controls used to manage scrolling through pages of the displayed report.

The menu bar provides you with the following choices:

- The **FILE** menu enables you to close the report, set up how the report is to be printed, print the report, export (send) the report to a file, and exit the Report program.

- The **WINDOW** menu enables you to tile windows (i.e., display the **MAIN MENU** and the report side by side), cascade windows (i.e., display the report on top of the **MAIN MENU**), arrange icons, and switch between the displayed report and the **MAIN MENU**.

- The **HELP** menu displays a **CONTENTS HELP** screen that enables you to select a topic you want more information on. It also enables you to Search for a topic or report you want more information on.

These icons manage the handling of the report once it is built.

- The first icon closes the report.

- The second icon prints the report.

- The third icon enables you to set up how the report is to be printed.

- The fourth icon controls zooming of the report display.

3.3.5 SELECTING A PRINTER

When a printed copy of the report is selected, the PNM Plus Reports program outputs the report to your system's default printer. Your system's Windows print manager controls printer selection and configuration.

3.4 The 32-Bit Report Generator (OPTIONAL)

Note: *This section discusses the optional 32-Bit Report Generator. For information about the standard PNM Plus Reports, refer to Section 3.3 and Appendix C.*

The 32-Bit Report Generator is an optional enhancement to PNM Plus, allowing a greater amount of flexibility in the design of reports. The standard PNM Plus reports, discussed in the previous section, offer a wide range of fixed-format reports. However, they do not allow you to vary the format of individual reports, or to create entirely new report formats "on the fly." If you install the 32-Bit Report Generator, a new icon, called "32-Bit Reports," is added to the PNM Plus program group. The standard (16-bit) reports are still available, should you choose to use them.

The 32-Bit Report Generator provides a small number of sample report templates to get you started, but then lets you specify new templates of your own. Using these custom templates, you can select payphone information from the database and display it in virtually any manner you choose.

Note: *Some data selection and display options require that you also have a copy of Seagate Crystal Reports, an industry standard report generation package.*

Reports processing can be performed at any time. You can also schedule reports to be run on any day and time that you desire, using the Windows Task Scheduler.

To access the 32-Bit Report Generator **CRITERIA SELECTION** menu, click on **START**, move the mouse to **PROGRAMS-PNM PLUS**, then click on **32-BIT REPORTS**. The screen in Figure 3-10 appears.

Note: *If the 32-Bit Reports software does not work properly immediately after installation, your computer may have an ODBC conflict. To fix this problem, insert the PNM Plus CD-ROM and select **START-RUN**. Click on BROWSE and navigate down through the directory structure to find the **odbc32** directory under **pnmplus\rpts32**. Locate and run the **Setup.exe** file in this directory. When finished, restart your computer and try the 32-Bit Reports again.*

Note: *After a new install of 32-Bit Reports, you must run Reports (16-Bit) prior to running 32-Bit Reports to establish links to your PNM Plus and SMDR databases. Click on **START**, move the mouse to **PROGRAMS--PNM PLUS**, then click on **REPORTS**. You can then immediately select **FILE--EXIT** from the PNM Plus Reports toolbar. You do not have to actually run a report to esatblish your database links. If this link is not eatblished, you will get an **APPLICATION ERROR** message box when attempting to run some of the reports that will state that "C:\NEVER\PNMPLUS.MDB" isn't a valid path.*

The **SELECT REPORT** field is used to select a template to use as a basis for your custom report. The fields under **AVAILABLE SELECTIONS** are used to build a set of conditions the data must meet in order to be included in the report. As you select criteria, the choices are progressively displayed in the large window near the bottom of the screen. This allows you to see exactly what you have requested in the report.

The buttons along the right edge of the menu are used to delete unneeded **TEMPLATES**, generate the specified **REPORT**, **EXPORT** the report to a format of your choice, **PURGE** unnecessary data, **CLEAR** the criteria and values you have entered, **SAVE** your entries as a new template, select custom report **VIEWS**, display on-line **HELP**, and **EXIT** the 32-Bit Reports application.
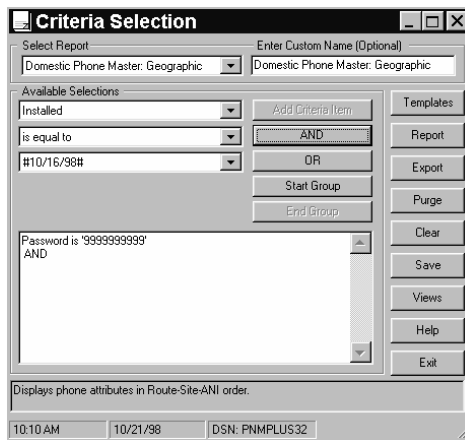
Figure 3-10

3.4.1 SAMPLE REPORT TEMPLATES

When you first open the 32-Bit Report Generator, several sample report templates are available. These serve as starting points for use in creating your own custom templates and report formats. The names of these basic templates appear in a drop-down list when you click on the arrow to the right of the entry under **SELECT REPORT** (Figure 3-10). A description field near the bottom of the **CRITERIA SELECTION** screen provides a brief explanation of the report when you select it from the list. For convenience, the template names are also shown in Table 3-1.

The Geographical report templates display the selected phone information in Route-Site-ANI order. The Financial templates display the information in Customer-Site-ANI order. The Maintenance reports display it in Technician-Site-ANI order.

The Master reports display all available data that meet your selected criteria. The Hit List reports display data from the last and previous contacts for selected phones. The Last Contact per Day reports display data from the last contact per day. The All Contacts reports display data from all contacts for the selected phones. The SMDR reports display SMDR data for the selected phones.

Note: *To run SMDR reports, the current database must be PNMRPTS.MDB. For all other types, the current database must be PNMPLUS.MDB.*

As you use these basic templates to create your own reports, the names of your new reports are added to the list. This is done by means of the **ENTER CUSTOM NAME (OPTIONAL)** field and the **SAVE** button. The new report name then appears in the **SELECT REPORT** list next time you open the 32-Bit Report Generator.

Table 3-1

32-Bit Template Names
Call Counters: Financial
Collections[a]
Domestic Phone Master: Geographic
Domestic Phone Master: Financial
Domestic Phone Master: Maintenance
Domestic Hit List: Geographic
Domestic Hit List: Financial
Domestic Hit List: Maintenance
Domestic Last Contact per Day: Geographic
Domestic Last Contact per Day: Financial
Domestic Last Contact per Day: Maintenance
Domestic All Contacts: Geographic
Domestic All Contacts: Financial
Domestic All Contacts: Maintenance
Domestic SMDR: Geographic
Domestic SMDR: Financial
Domestic SMDR: Maintenance
Domestic Purge SMDR Records

a. The Collections Report is designed for Frontier data only.

3.4.2 CONTROLLING REPORT CONTENTS

The 32-Bit Report Generator allows you to precisely control the data that appears in your custom reports. The Available Selections area of the screen (Figure 3-11) contains several fields and buttons that are used for this purpose. By carefully specifying the data you wish to retrieve, you can create custom reports that contain any information you wish to review.

Figure 3-11

The first field is used to specify the criteria (database fields) from which to select the information that will appear in your report. When you click on the arrow, a drop-down list appears. This list includes all possible criteria for the template you have specified. Examples are ANI, Location, Technician Name, Contact Name, and so on.

The second field is used to choose the operator to be applied to records matching the criterion specified above. These include all common logical operators, such as Equal To, Not Equal To, Greater Than, Greater Than or Equal To, Less Than, Less Than or Equal To, Between, Not Between, etc. The available operators appear in a drop-down list when you click on the arrow.

The third field is used to enter values for the operator to use in selecting records for the report. In some cases, a drop-down list may be available, but usually you will type a value in this field.

As you choose items or enter values in these three fields, the same information also appears in the larger window at the bottom of the **AVAILABLE SELECTIONS** area. This window serves as a summary of all the selections you have made, and becomes more important as you add more criteria to the report. The information in this window is fully editable, using the computer's mouse and keyboard.

The **ADD CRITERIA ITEM** button is used to enter additional criteria into your custom report definition. This allows you to "zero in" on just the records you want included in the report. The **AND** and **OR** buttons perform logical functions that combine groups of records or select the intersection of two groups, respectively. The **START GROUP** and **END GROUP** buttons are used to set of ranges of values, so that there is no ambiguity in the meaning of the selections you have made. (In practice, they put parentheses around the entries you make after pressing **START GROUP** and before pressing **END GROUP**.)

Here is an example of how to use these buttons: If you have already specified "*Location--Equal To--Brandon, FL*," your report will contain all phones located in Brandon, Florida. You can narrow down the records to include only those that are in exchange "555," or are serviced by Technician John Smith. To do this, press **ADD CRITERIA ITEM**, then press **AND** and select "**START GROUP**--*ANI--Between--8135550000--***AND**--*8135559999*." Next, press **ADD CRITERIA ITEM** again, followed by "**OR**--*Technician--Equal To--John Smith--***ADD CRITERIA ITEM**--**END GROUP**." As you make entries, they are reflected in the large window at the bottom. In this case, the entries would look like this:

```
        LOCATION = 'Brandon, FL'
AND   (     ANI BETWEEN 8135550000 AND 8135559999
       OR   Technician = 'John Smith')
```

Any combination of selection criteria can be chosen. If you do not specify any criteria, the report will contain ALL records in the database. If you specify an impossible combination, a blank report will result.

3.4.3 WORKING WITH CUSTOM TEMPLATES

The 32-Bit Report Generator allows you to add new templates of your own design, run reports using those templates, and delete templates that no longer meet your needs. These tasks are discussed in the following sections.

3.4.3.1 Designing a Report Template

1	Click on **START**, move the mouse to **PROGRAMS-- PNM PLUS,** then click on **32-BIT REPORTS**.	The **CRITERIA SELECTION** menu appears. *Figure 3-12.*
2	Click on the arrow under **SELECT REPORT** to display the drop down list. Choose a report template from which to start.	The name of the selected template appears in the **SELECT REPORT** field.
3	Under **AVAILABLE SELECTIONS**, click on the arrow at the right end of the field beside the **ADD CRITERIA ITEM** button. (See Figure 3-12.) Select the criterion you wish to use.	All of the available selection criteria appear in a drop-down list. Select the one you wish to use and click on **ADD CRITERIA ITEM**. The criterion name appears in the field next to the button, and in the large window at the bottom.

Figure 3-12

4	Next, click on the arrow in the second field (the one beside the **AND** button) and select a condition to be met.	This displays a drop down list of conditions that the data must meet to be selected. Choose the one you wish to use. The selected condition appears in the field next to the button and in the large window.
5	Now click in the third field (the one beside the **OR** button). Enter a value and press *Enter.*	In some cases, a drop-down list will appear. In others, you will need to enter a value of interest. For example, if you selected *ANI* and *Greater Than* in the fields above, you would enter the lowest ANI to search for in this field.

6	If you are finished specifying your data selection criteria, go to Step 7. If not, repeat Steps 3 through 5 to select additional criteria, operators, and values and add them to the list.	As you select more criteria, conditions, and operators, the large window at the bottom of the **AVAILABLE SELECTIONS** area progressively displays them. This gives you a running summary of all the selections you have made. Grouped selections are indicated by parentheses to avoid confusion.

7	If you want to specify additional report formatting details, click on the **VIEWS** button at the right side of the menu. Select the view characteristics you wish to use, then click **OK**.	*Figure 3-13* The **VIEW SELECTION MANAGER** allows you to specify formatting details for the report.
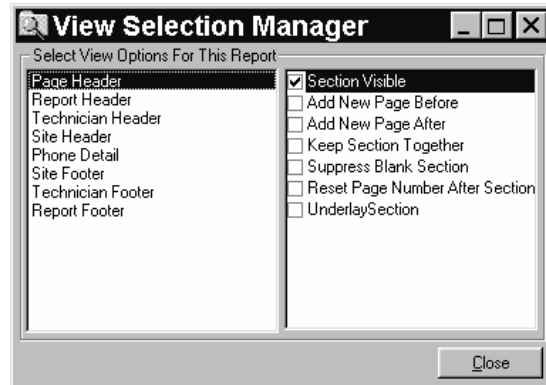
8	Click on the **SAVE** button and enter a name for the template. Click **OK.**	*Figure 3-14*
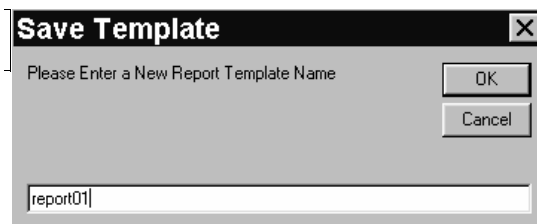
9	Enter a brief description of the template when asked to do so by the next prompt.	*Figure 3-15*

10	Click on **OK**.	The report template is saved with the custom name and description you have entered.

3.4.3.2 Running a Report

1	Click on **START**, move the mouse to **PROGRAMS-- PNM PLUS,** then click on **32-BIT REPORTS**.	The **CRITERIA SELECTION** menu appears. *Figure 3-10.*
2	Click on the arrow under **SELECT REPORT** to display the drop down list. Choose the template for the report you wish to display.	The name of the selected template appears in the **SELECT REPORT** field. The criteria that define the report are displayed in the large window at the bottom of the **AVAILABLE SELECTIONS** area.
3	If necessary, make changes to the values that appear in the selection summary (large) window.	You can edit this information by highlighting and typing over it, or by using the Criteria Builder fields and buttons to make modifications.
4	When you are satisfied with the report definition, click on the **REPORT** button.	The computer processes the database information and generates a report containing the records you have chosen.

3.4.3.3 Deleting a Report Template

1	Click on **START**, move the mouse to **PROGRAMS-- PNM PLUS,** then click on **32-BIT REPORTS**.	The **CRITERIA SELECTION** menu appears. *Figure 3-10.*
2	Click on the **TEMPLATES** button. Choose the name of template you wish to delete.	The **REPORT TEMPLATE MANAGER** screen appears. *Figure 3-16.*

Figure 3-16

The name of the selected template appears in the **PLEASE CHOOSE A REPORT TEMPLATE** field. The criteria that define the report are displayed in the larger **DEFAULT CRITERIA** window below.

3	Review the report definition carefully to make sure you no longer wish to keep it.	**Caution:**	*Once you delete a report template, it cannot be restored. Make sure you do not need the template before you delete it.*
4	Click on the **DELETE** button.	The template is deleted.	

3.4.3.4 Exporting Report Data

1	Click on **START**, move the mouse to **PROGRAMS-- PNM PLUS,** then click on **32-BIT REPORTS**.	The **CRITERIA SELECTION** menu appears. *Figure 3-10.*
2	Click on the arrow under **SELECT REPORT** to display the drop-down list. Choose the template for the report whose output you wish to export.	The name of the selected template appears in the **SELECT REPORT** field. The criteria that define the report are displayed in the large window at the bottom of the **AVAILABLE SELECTIONS** area.
3	If necessary, make changes to the values that appear in the selection summary (large) window.	You can edit this information by highlighting and typing over it.
4	When you are satisfied with the report definition, click on the **EXPORT** button.	The **SELECT OR ENTER A FILE TO EXPORT TO** screen appears. *Figure 3-17.* *Figure 3-17*
5	Select the file to which the report output is to be exported.	
6	Click on **OK**.	The computer processes the database information and generates a file containing the specified records in the format you have chosen.
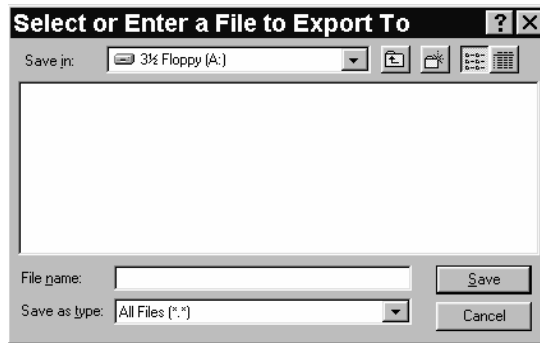
3.4.4 MANAGING REPORT OUTPUTS

The 32-Bit Reports software allows you to manipulate report data with great flexibility.   When you run a report, it is normally sent to the PC monitor. However, once it is displayed, you can print a hard copy by clicking on the printer icon. You can also write it to a disk file or export it to your favorite word processing or database program for additional editing. This is done by means of the envelope icon in the32-Bit reports taskbar, which displays the **EXPORT** prompt (Figure 3-18).
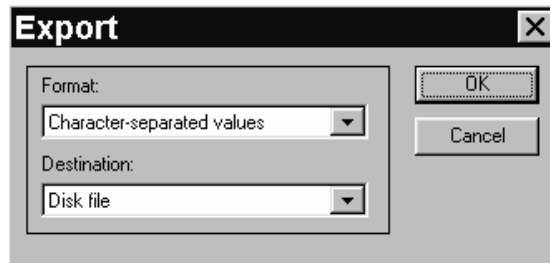
Figure 3-18

The **Format** selections include a variety of popular formats, such as Text, Comma-Separated Values (CSV), Rich Text Format, Word for Windows, and Excel.

The **Destination**s include Disk file, Exchange Folder, Lotus Notes Database, and Microsoft Mail (MAPI).

3.5 PNM Plus Utilities

The PNM Plus Utilities program enables you to perform system functions such as backing up and restoring files. You perform these functions from the **PNM PLUS UTILITIES** screen **MAIN MENU.**

To access **UTILITIES,** click on **START**, move the mouse to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.

The **PNM PLUS UTILITIES** screen appears with a function menu and a **MAIN MENU** (see Figure 3-19).
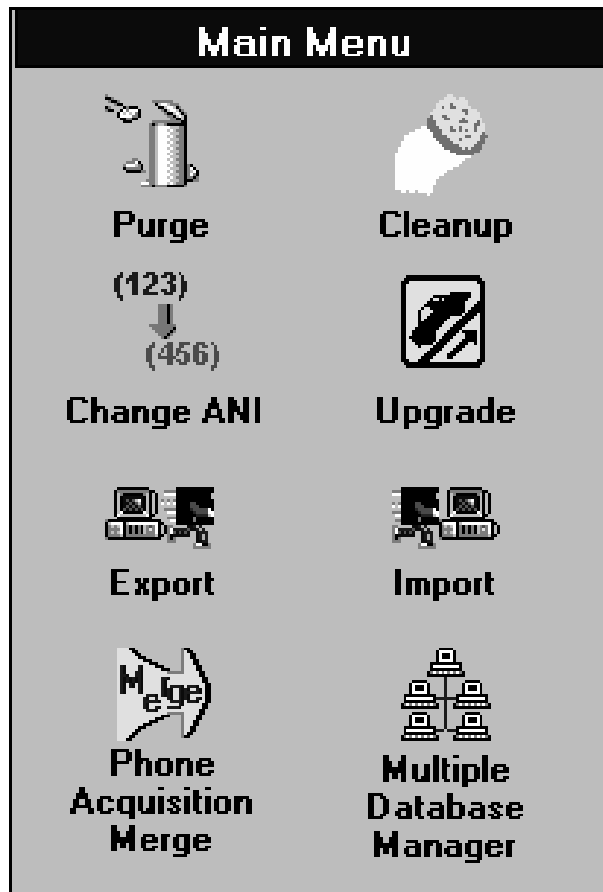
Figure 3-19

The function menu contains a **FILE** menu and a **HELP** menu. The options under each of these are:

File	Lists each utility, which you can select from this menu or by clicking on the appropriate icon in the **MAIN MENU**. **Exit** -- Exits the Poll Manager application
Help	**Contents -** Displays a figure of the **PNM PLUS UTILITIES** screen with a hypertext link to a Utilities overview and with hotspots for each of the icons in the Main Menu. **About Utilities** - Displays an About Box similar to the one in Section 3.1.1.3, *The Help Menu*.

The Main Menu provides you with the following icons. Clicking on an icon enables you to perform the following functions.

- *Import:* Imports data from various data sources.

- *Export:* Exports data from PNM Plus to files that can be used by other programs.

- *Purge:* Purges PNM Plus data source fields for a specified date range.

- *Cleanup*: Repairs and compacts the displayed database.

- *Change ANI*: Changes the ANI for a selected group of phones.

- *Upgrade*: Converts old PNM Plus databases into databases that can be used by the current version of PNM Plus.

- *Phone Acquisition Merge:* Combines the data from an existing separate PNM Plus database with your working database. This is used when you add new phones to your network.

- *Multiple Database Manager (Optional):* Combines polling and SMDR data from satellite office databases into a single master (home office) database. Downloads configuration information from the master database to satellite databases.

For more information on these functions, see Section B, *Using the PNM Plus Utilities*.

Note: *Backup and Restore functions are provided by your PC Operating System. It is very important that you make a backup copy of all of the key files and programs used by your system.*

4. ADMINISTERING YOUR PAYPHONE NETWORK

Your payphone network consists of the site and route where you place the phone, the contract you sign with the owner of the site (your customer), and the technician you hire to service your phones. When you buy a payphone from Elcotel to begin your payphone business, that payphone becomes part of the network.

You administer each of these network elements by using the PNM Plus Operator Console **NAVIGATION** screen. The following sections give you an overview of a payphone network, introduce you to the **NAVIGATION** screen, and show you how to use the **NAVIGATION** screen to administer your network.

4.1 An Overview of a Payphone Network

To understand how to use the **NAVIGATION** screen, you must understand the hierarchy it pictorially represents. This section explains that hierarchy. Let's start with three payphones:
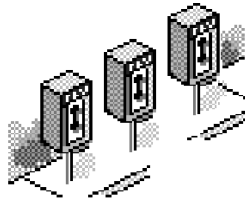
These three payphones are located at a convenience store on Main Street. They stand beside each other in the parking lot. Because they are located at the same convenience store, they share the same *Site*. A *Site* is simply a physical location where a phone is located:
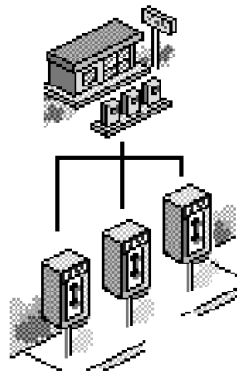
This convenience store is one of a chain of stores operated by Al's Quick Stop, Inc. Not only are there phones at this location, but there are payphones at other Al's Quick Stops around the city. All phones at all stores were put in under a master agreement, or *Contract*, made with the store owner. This *Contract* covers many stores, and each store has several phones.

The store owner is your *Customer.* In small operations, there might be only one *Customer,* one *Contract,* one *Site,* and one *Phone,* but they still fit into this hierarchy. The following picture shows a **CUSTOMER** who has a **CONTRACT** for a *Site* that has three *Phones.*
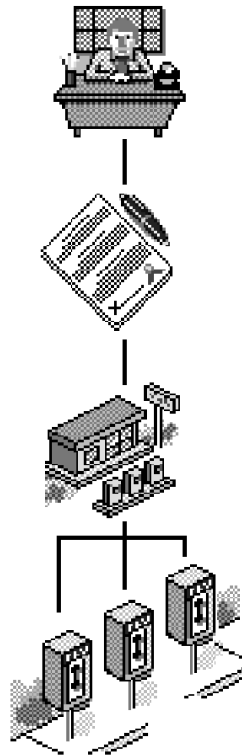
The hierarchy of administering a payphone also includes the operational arrangements of a payphone. In day-to-day operations, there is the need to perform maintenance on a phone. *Technicians* need to make cashbox collections periodically or investigate and repair reported problems with a payphone.

As a result, the picture needs to be expanded to show which *technician* is responsible for maintaining the phone. *Technicians* typically have a predetermined order in which they work phones. A *technician* on Monday might visit the West side of town and on Wednesday might visit the East side of town or have some other organized plan for going from phone to phone. This plan is kept in the database as a *Route.*

In our example, one convenience store might be on Joe's Route Number Three or on the Thursday Cashbox Collection Route. A different convenience store might be on Route 4, which is serviced by a different technician. The following picture shows these added parts to our hierarchy of the payphone.
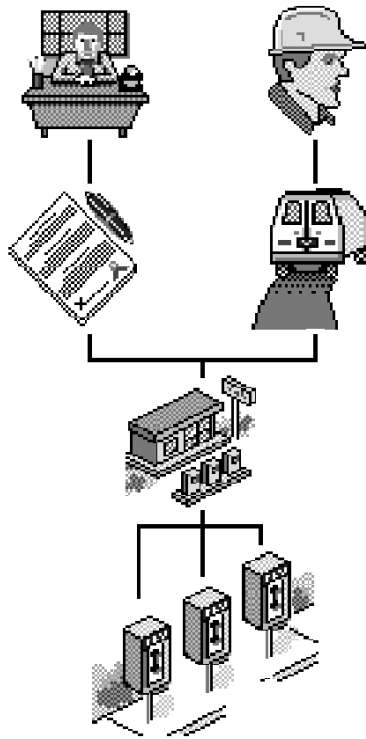
These same symbols, in this same order, are used on the **NAVIGATION** screen to represent the hierarchy of data that supports the administration of a payphone.

Notice that when you start at the bottom of the hierarchy (i.e., the phone), there is a one-to-one relationship with the component above it. For example, a phone is located at one site, a site is owned by one customer with one contract, and a site is part of one route for one technician.

When you start at the top of the hierarchy, however, there can be a one to many relationships. For example, a customer can own many sites with a different contract for each site, a technician can service many routes, a route can contain many sites, and a site can contain many phones.

The following section provides you with an overview of the **NAVIGATION** screen.

4.2 Using the Navigation Screen

The home screen where you can add, update, and delete payphone information is the **NAVIGATION** screen. ***Figure 4-1***.

Figure 4-1

To access this screen, open the **PNM PLUS OPERATOR CONSOLE** (*Section 3.1*) and click on the **PAY-**

PHONE ADMINISTRATION icon   .

The **NAVIGATION** screen provides you with a summary view of each major component of managing a payphone environment, including the following:

- The ANI of your payphone.

- The site where the payphone is located.

- The technician assigned to the site and the route he has assigned to the site.

- The customer who owns the site where your phone is located and the status of the contract between you and the customer.

This chapter discusses how to use the **NAVIGATION** screen to administer each of these components.

The **NAVIGATION** screen is divided into two parts (see Figure 4-2):

- When you first enter this screen, the left side consists of a list box of payphones you have entered into your database. You can also display a list box of sites, contracts, customers, routes, and technicians in your database by clicking on the appropriate icon in the right side of the screen.

  To display the items in the list box by ANI, click on **ANI** in the **SORT ORDER** box. To display the items in the list box in alphabetical order, click on **LOCATION** in the **SORT ORDER** box.

To add information to your database, see Section 4.3, *Adding Payphone Information*.

- The right side of the screen displays the hierarchy discussed in the previous section. When you double click on a phone from the **PHONES** list on the left side of the screen, summary information about the phone's site and the site's technician, route, owner (customer), and contract appear in the other icons.
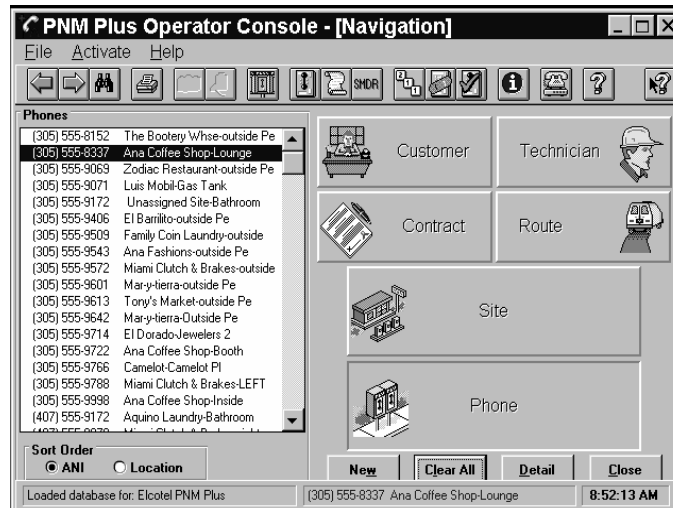
Figure 4-2

To use the **NAVIGATION** screen, you need to know how to perform the following tasks:

- Clear the **NAVIGATION** screen display.

- Select a component and view its relationship with other components.

- Create a new item.

- Get more detail about an item.

- Use the toolbar Left and Right arrow buttons.

- Use the toolbar Copy and Paste buttons.

- View the payphone environment.

Each of these tasks is described in the following sections.

4.2.1 CLEARING THE NAVIGATION SCREEN DISPLAY

If the icons in the right side of the **NAVIGATION** screen contain information (are not at their default settings), you need to clear the screen before you can perform another task.

To clear the entries on the **NAVIGATION** screen, click on **CLEAR ALL**.

Note: *It is important to understand when the **NAVIGATION** screen needs to be cleared. As an example, if you select the **CUSTOMER** icon, choose a Customer from the list box, and then click on the **SITE** icon, the **NAVIGATION** screen only displays sites for that Customer. If you want to see a list of all sites in your database, you must **CLEAR** the **NAVIGATION** screen to turn off the selected Customer before all sites can be displayed.*

4.2.2 SELECTING AN ITEM AND VIEWING RELATIONSHIPS

All items on the **NAVIGATION** screen are chosen in the same way. The following example uses the *Site* as the item to be chosen, but the technique described works for phones, routes, contracts, customers, and technicians.

When you first enter the **NAVIGATION** screen, the list box on the left side of the screen displays the phones in your database. When you click on an icon from the right side of the screen, such as the Site icon, the list box displays all of that item (i.e., all sites) that exist in your database.

When you choose an item (i.e., site) from the list box, that item and all the data on the **NAVIGATION** screen higher up in the hierarchy also appear. For example, when you choose a site from the list box, the **NAVIGATION** screen also displays the *Customer*, *Contract*, *Technician,* and *Route* related to that site.

If you choose a *Site* and there is only one phone at that site, the **NAVIGATION** screen also displays that phone. If there are multiple phones at a site, the **NAVIGATION** screen tells you how many phones are at the site. You can see the list of phones by clicking on the **PHONES** icon.

4.2.2.1 Selecting an Item (i.e., site) from the Navigation Screen

1	From the default **NAVIGATION** screen (*Figure 4-1*), click on the **SITE** icon.

Note: *If you are not at the default screen, click on CLEAR ALL.*

The **NAVIGATION** screen displays the **SITES** list box. *Figure 4-3*.
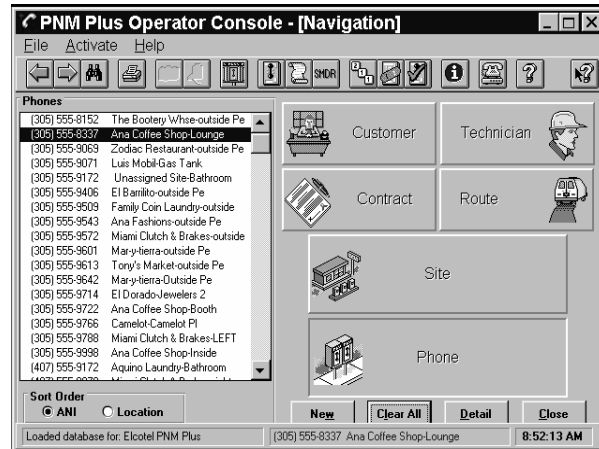
Figure 4-3

2	Select a site in the list box.

3	Click on the site.	The right side of the **NAVIGATION** screen displays summary data about the selected site. *Figure 4-4*.
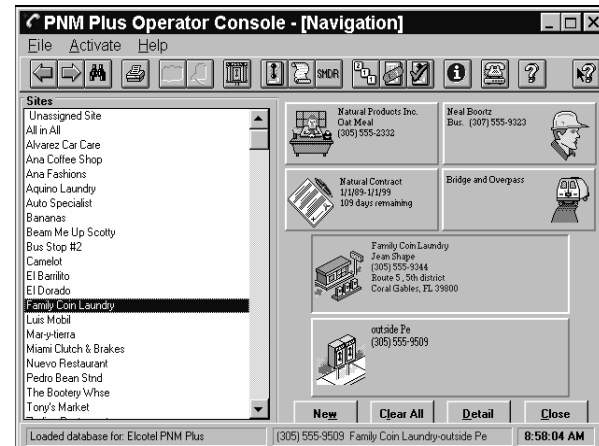
Figure 4-4

If you perform the previous procedure for the contract or route, only that item and the item above it (customer or technician, respectively) appear in the right side of the screen. If you perform the previous procedure for the customer or technician, only that item appears in the right side of the screen.

4.2.2.2 Viewing Data for an Item lower in the Hierarchy

There might be times when you want to see data for an item that is lower than another item in the hierarchy (e.g., sites assigned to a technician).

1	At the **NAVIGATION** screen (*Figure 4-2*), click on **CLEAR ALL**.	
2	Click on the icon for which you want information (i.e., **TECHNICIAN**).	
3	Select an item (i.e., **TECHNICIAN**) from the list box.	
4	Click on the item.	Information on the item appears in the icon of that item.
5	Click on the icon lower in the hierarchy for which you want information (i.e., **SITE**).	In this example, all sites assigned to that technician appear in the list box.

4.2.3 CREATING AN ITEM USING THE NAVIGATION SCREEN

The **NAVIGATION** screen can be used as a starting point for adding new items to the database.

1	Click on the icon for the type of record to be added (e.g., **TECHNICIAN, SITE, CUSTOMER***).	
2	Click on **NEW**.	The **DETAIL** screen for that item appears. *Figure 4-5*. This screen enables you to enter information about the item. The **DETAIL** screens are described later in this chapter.
		Another way to create a new item is to double click on an icon in the **NAVIGATION** screen to display that item's **DETAIL** screen. You can then click on that screen's **NEW** or **ADD** button.

4.2.4 GETTING MORE DETAIL ABOUT AN ITEM ON THE NAVIGATION SCREEN

This example explains the technique for displaying detail information about a *Site* displayed on the **NAVIGATION** screen, but the method works the same for any of the six categories of displayed data. In our example, we want more information about the *Site,* so we perform the following steps.

1	At the **NAVIGATION** screen (*Figure 4-2*), click on **CLEAR ALL**.	
2	Click once on the **NAVIGATION** screen **SITE** icon.	The **SITES** list box replaces the **PHONES** list box.
3	Select a site from the **SITES** list box	
4	Click on the site.	The name of the site appears in the **SITE** icon.
5	Double click on the **SITE** icon or click on the **SITE** icon and then click on **DETAIL.**	The **SITE DETAIL** screen appears. *Figure 4-5*.
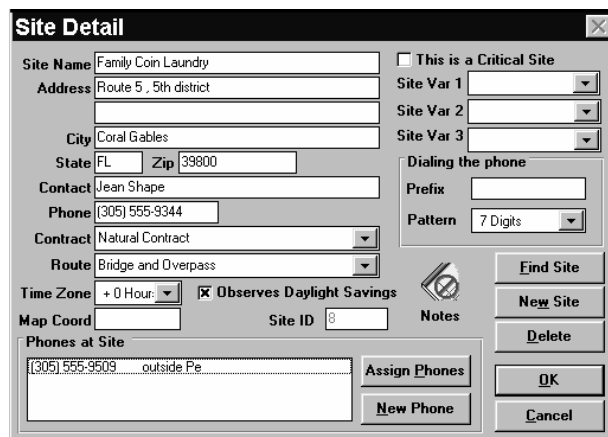
Figure 4-5

The resulting display is the **DETAIL** screen for the selected item (i.e., **SITE**). At this screen, you can modify the data, delete the record, copy and paste the data into a new record, or perform other tasks as appropriate.

4.2.5 USING THE TOOLBAR LEFT/RIGHT ARROWS

The toolbar arrows let you use your mouse to scan through lists of data without having to pick each individual item to be displayed. These arrows are not always active; they only become active when there is a scrolling list.

There are two different cases in which the toolbar arrows can be used for scrolling. The first case involves scrolling directly on the **NAVIGATION** screen, and the second involves scrolling when a **DETAIL** screen appears.

When the **NAVIGATION** screen appears and a list of items is shown on the left side of the screen, pressing the right arrow moves forward in the list (from top to bottom) and displays the summary data on the **NAVIGATION** screen. Pressing the left arrow moves backward in the list (from bottom to top) and displays the summary information.

When a **DETAIL** screen (such as the **PHONE DETAIL** screen) appears, you can move forward and backward through the list of available items by using the right and left arrows, respectively. Detailed information about each of the records also appears. Some screens, such as the **CUSTOMER DETAIL***,* **TECHNICIAN DETAIL***,* and **CONTRACT DETAIL** screens, have a scrolling list you can use to scroll through without affecting the position of data displayed on the **NAVIGATION** screen.

4.2.6 USING THE TOOLBAR COPY/PASTE ICONS

PNM Plus gives you the ability to make a copy of an existing record quickly. This is useful if you need to make a new record of any type that is similar to an existing record. The **COPY** icon lets you save an image of the existing record, while the **PASTE** icon lets you transfer that saved image onto a new record. You can reduce the time and keystrokes needed to make new records using this technique.

Assume for this example that you want to make a new Site record that looks almost exactly like an existing one. The following steps show you what to do.

1. Display an existing record on the **SITE DETAIL** screen.

2. Click on the ![icon] icon on the toolbar.

3. Click on **NEW SITE** at the **SITE DETAIL** screen.

4. Click on the ![icon] icon on the toolbar.

The data from the first record fills in the blanks of the new screen. At this point, you can change any data fields you want and save the new record by clicking on **OK**.

When you add a phone or perform other functions using the **COPY** and **PASTE** buttons, the **PAYPHONE UPDATE** screen (Figure 8-1) appears. This allows you to choose when the changes will be downloaded to the phone(s).

4.2.7 VIEWING THE PAYPHONE'S ENVIRONMENT

The NAVIGATION screen enables you to see summary information about a payphone, including sup-
porting information about managing the payphone. For example, once a phone is picked for display on
the NAVIGATION screen, you can immediately see the name of the contact person at the site where the
phone is located.

You can also see the route the phone is on, the technician who services it, the contract the phone falls
under, and the customer with whom you negotiate the contract details. Furthermore, if the phone is at
a site you have identified (by turning on the Critical Site flag) as needing special attention or handling,
a special indicator appears on the screen to highlight that site (the hand pointer in Figure 4-6).

Figure 4-6

4.3 Adding Payphone Information

Your payphone is the cornerstone of your payphone network. When you purchase a payphone, you can do the following:

- Add the phone to the PNM Plus database.

- Assign the phone to a polling list.

- Assign the commands you want executed when PNM Plus and your phone communicate with each other.

- Assign operational files (registers and options, rates, priority parsing, speed dialing, program, repertory dialer/credit/debit card, voice, language, scrolling messages, charged rates, and tax rates) to the phone.

- Add notes that contain additional information about the phone.

You perform these tasks and also update and retrieve information about any phone already in your database by using the **PHONE DETAIL** screen (see Figure 4-7).

Figure 4-7

When the **PHONE DETAIL** screen appears, it displays data for the currently selected payphone (if you already have payphones in your database). The selected payphone can be identified as the one whose ANI appears in the **PHONE ANI** field.

Note: *Whenever you add or update information for a phone, you must click on **OK** for the edits to take effect. Dialing a payphone before hitting **OK** will not download your on-screen edits. Once you click **OK**, a **STOP** - download warning screen informs you that you need to download the addition or modification to the phone. See Chapter 8, Managing Payphone Configuration, for information on responding to this screen.*

4.3.1 THE PHONE DETAIL SCREEN

This section describes the fields in the **PHONE DETAIL** screen.

1	In the **PHONE ANI** field, enter the ANI of the phone.	This is the 10-digit telephone number assigned to the payphone. Even though the phone might be located in a local calling area, enter the full 10-digit number here. Once the phone is in the database, this number is read-only and cannot be changed.
2	In the **PHONE MODEL** field, select the Elcotel model designation for the payphone.	Use this field to select any of the available Elcotel payphone models. Certain phone types may have unique options available. Be sure to select the proper type for each of your phones, and do not change it unless the phone has actually been replaced with a different model.
3	In the **REP. DIALER KEYS** field, select the number of repertory dialer keys on the phone.	The drop down box offers a choice of either 9, 12, or 12A repertory dialer keys.
		Note: *This field is only available for KX-5502 phone types. The 12A repertory dialer option only applies to Canadian payphones.*
4	In the **CURRENT SECURITY PHONE** ID field, enter the 4- or 10-digit identifier for the payphone.	This field must be numeric and unique.
5	In the **CURRENT SECURITY PASSWORD** field, enter the 8-character password used to access the payphone.	
6	In the **CURRENT SECURITY BYPASS** field, enter the 8-digit security bypass code.	The **CURRENT SECURITY BYPASS** code (also called Owner Bypass) is used to enter voice telemetry, either local or remote.
7	In the **NEW SECURITY PHONE ID** field, enter a 4- or 10-digit identifier to be assigned to the phone that is different from the one you entered for the **CURRENT SECURITY PHONE ID**.	PNM Plus downloads this ID to the phone during the next dial-up session with the phone. At that time, the database is altered so that this value becomes the Phone ID. The New Phone ID is then set to *blanks.*
8	In the **NEW SECURITY PASSWORD** field, enter an 8-character password to be assigned to the phone that is different from the one you entered for the **CURRENT SECURITY PASSWORD**.	This password is downloaded to the payphone during the next dial-up session. At that time, the database is altered so that this value becomes the Password. The New Password is then set to *blanks.*

9	Once you have entered a site in the database and assigned your phone to the site, select the site from the **SITE NAME** field drop down list.	The site is where the payphone is located. If no specific site has been identified for a phone, the default site ***Unassigned Site*** is set by the program. To assign your phone to a site, see Section 4.4.6, *Assigning Phones to a Site*.
10	In the **LOCATION** field, enter the location at the site where the phone is placed.	For example, if the site is ***BP Station,*** the location might be ***Inside, Outside, Pedestal, Drive-Up, Left, Center,*** or ***Right.*** The location does ***not*** refer to the site name, but indicates where on the site's property the payphone can be found.
11	If you have your phones divided into groups, select the group you want from the **GROUP** field's drop down list.	
12	PNM Plus automatically enters the **INSTALL DATE**.	This date can vary from user to user. It represents the date the phone was physically erected at a site or the date the first contact with the phone was established.
13	PNM Plus automatically enters the **PGM VER.**	This field contains the version of the software downloaded to the payphone. This data is read directly from the payphone during communications sessions with the phone.
14	PNM Plus automatically enters the **ROM VERSION**.	This field contains the version of the chip set in the payphone. This value is read directly from the payphone during communications. You cannot edit this field.
15	PNM Plus automatically enters the **SERIAL NO**.	This field contains the serial number of the board set in the payphone. This value is read directly from the payphone during communications. You cannot edit this field.
16	In the **KEYS - UPPER** field, enter the 10-character identifier of the key that fits the payphone housing's upper half.	
17	In the **KEYS - LOWER** field, enter the 10-character identifier of the key that fits the payphone housing's lower half.	
18	In the **CASHBOX SERIAL** field, enter the 10-character serial number of the cashbox installed in the payphone.	If you decide to use this field, you must maintain this number, which requires procedures to be in place to record the number of each replacement cashbox during cashbox collections.
19	In the **CASHBOX SEAL** field, enter the 10-character seal identifier of the cashbox installed in the payphone.	Maintaining this value requires following the same procedures as those followed for the ***Cashbox Serial*** number.
20	Click on **REGOPT** to set your phone's registers and options.	See Section 4.3.5, *Setting Payphone Registers And Options*.

21	Click on **RATES** to assign a rates file to your phone.	See Section 4.3.6, *Assigning a Rates File to a Phone*.
22	Click on **PRIPAR** to assign priority parsing files to your phone.	See Section 4.3.7, *Assigning a Priority Parsing File*.
23	Click on **SPEED** to assign speed dial files to your phone.	See Section 4.3.8, *Assigning a Speed Dial File*.
24	Click on **PROGRAM** to upgrade your phone to a newer version of software.	See Section 4.3.9, *Assigning a Program File*.
25	Click on **REP/CARD** to assign a Repertory Dialer or Credit/Debit Card Template.	This button is not available to Series 5/5501 phones. See section Section 4.3.10, *Assigning a Rep/Card Template*.
26	Click on **LANGUAGE 1** to select an additional voice file to be downloaded to a KX 1.3 phone.	This button is not available to Series 5/5501 phones or KX-5502 phones running KX 1.2 firmware or earlier. Note: *KX 1.3 phones are supplied with English (primary) and Spanish (secondary) language files. At this time, KX phones only support the download of one additional language file. Once downloaded, the new file will take the place of the secondary language file. If you assign files to both Language I and Language II for downloading, the file assigned to Language II will replace the Language I file upon downloading. For further instructions, see Section 4.3.13, Assigning a Language File.*
27	Click on **VOICE** to assign a Voice Brand file to a Series 5/5501 phone.	This button is not available to KX-5502 phones. See Section 4.3.12, *Assigning a Voice File*.
28	Click on **MESSAGES** to assign a scrolling message template.	This button is not available to Series 5/5501 phones. See Section 4.3.11, *Assigning a Message Template*.
29	Click on **DATES** to determine the dates and times each of the operational files was last modified and saved in the database.	
30	In the **PHONE VARIABLES** drop down lists, you can select three data items of user-defined information.	The titles associated with these three data items can be set in the **GENERAL** tab of the **CONFIGURATION** screen (see Section 7.3.2, *Setting General System Options*).
31	Click on the **LEC/LD RATES** drop down list and select a template to assign a Charged Rates Template.	See Section 9.5, *Estimating Payphone Expenses*, for information on creating and editing Charged Rates template files.
32	Click on the **CALL TYPE TAX RATES** drop down list and select a template to assign a Tax Rates Template.	See Section 9.5, *Estimating Payphone Expenses*, for information on creating and editing Tax Rate template files.

4.3.2 ADDING A PHONE TO THE DATABASE

When you purchase a phone, you first have to enter the phone into the PNM Plus database. See Section 4.3.1, *The Phone Detail Screen*, for more information regarding this screen.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	Double click on the **PHONE** icon or click on the **PHONE** icon then click on **DETAIL**.	The **PHONE DETAIL** screen appears. ***Figure 4-7***.
3	Click on **NEW**.	
4	Enter the **PHONE ANI**.	
5	Select the **PHONE MODEL**.	
6	If the phone is a KX-5502 model, select the number of **REP. DIALER KEYS**.	The drop down menu allows you to select either 9, 12, or 12A. **Note:** *The 12A repertory dialer option only applies to Canadian payphones.*
7	Enter the **CURRENT SECURITY PHONE ID**.	This field must be numeric and unique.
8	Enter the **CURRENT SECURITY PASSWORD**.	
9	Enter the **CURRENT SECURITY BYPASS**.	
10	Select the site from the **SITE NAME** field drop down list.	
11	Enter the **LOCATION**.	
12	Select the group you want from the **GROUP** field drop down list.	
13	PNM Plus will automatically enter the **INSTALL DATE, PGM VER, ROM VERSION,** and **SERIAL NO.**	
14	These fields are not required, but the data may be useful for your business needs later.	The **KEYS - UPPER** field. The **KEYS - LOWER** field. The **CASHBOX SERIAL** field. The **CASHBOX SEAL** field.
15	Click on **REGOPT** to set your phone's registers and options.	See Section 4.3.5, *Setting Payphone Registers And Options*.
16	Click on **RATES** to assign a rates file to your phone.	See Section 4.3.6, *Assigning a Rates File to a Phone*.

17	Click on **PRIPAR** to assign priority parsing files to your phone.	See Section 4.3.7, *Assigning a Priority Parsing File*.
18	Click on **SPEED** to assign speed dial files to your phone.	See Section 4.3.8, *Assigning a Speed Dial File*.
19	Click on **PROGRAM** to upgrade your phone to a newer version of software.	See Section 4.3.9, *Assigning a Program File*.
20	*(KX Phones)* Click on **REP/CARD** to assign a Repertory Dialer or Credit/Debit Card Template.	See Section 4.3.10, *Assigning a Rep/Card Template*.
21	*(Series 5/5501 Phones)* Click on **VOICE** to assign a Voice file.	See Section 4.3.12, *Assigning a Voice File*.
22	*(KX 1.3 Phones)* Click on **LANGUAGE 1** to select an additional language file for downloading.	See Section 4.3.13, *Assigning a Language File*. **Note:** *At this time, it you assign language files to both Language I and Language II for downloading, Language II will replace Language I upon download.*
23	*(KX Phones)* Click on **MESSAGES** to assign a scrolling message template.	See Section 4.3.11, *Assigning a Message Template*.
24	Click on the **LCD/LD RATES** drop down list in the **ESTIMATED CHARGES** field and select a Charged Rates Template.	See Section 9.5, *Estimating Payphone Expenses*, for information on creating and editing Charged Rates template files.
25	Click on the **CALL TYPE TAX RATES** drop down list in the **ESTIMATED CHARGES** field and select a Tax Rates Template.	See Section 9.5, *Estimating Payphone Expenses*, for information on creating and editing Tax Rate template files.
26	In the **PHONE VARIABLES** drop down lists, you can select three data items of user-defined information.	The titles associated with these three data items can be set in the **GENERAL** tab of the **CONFIGURATION** screen (see Section 7.3.2, *Setting General System Options*).
27	Click on **OK**.	The phone is added to the database and the **STOP**-download warning screen appears. ***Figure 8-1***. See Chapter 8, *Managing Payphone Configuration*, for download instructions.

4.3.3 ASSIGNING A POLL LIST TO YOUR PHONE

After you have entered your phone into the PNM Plus database, you can assign one or more poll lists to it. This poll list tells PNM Plus when to contact the phone and what information to upload from the phone or download to the phone during the polling process. You assign a poll list to a phone from the phone's **PHONE DETAIL** screen.

Before you can assign a poll list, you need to create one from the **POLL LIST MAINTENANCE** screen. See Section 5.1.1, *Creating a Poll List from the Poll List Maintenance Screen*, for instructions on creating a poll list.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), click on the phone from the **PHONES** list box (if not already highlighted).	The name of the phone appears in the **PHONE** icon.
3	Double click on the **PHONE** icon or click on the **PHONE** icon and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.
4	Click on **POLL LIST**.	The **ASSIGN POLL LIST** screen appears for the phone. *Figure 4-8*.
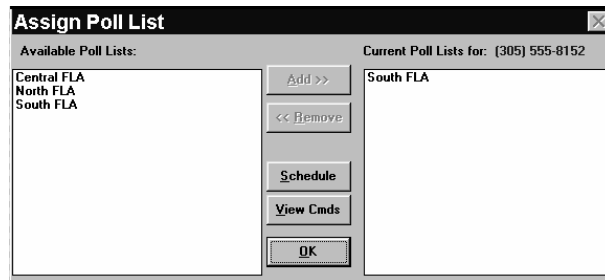
Figure 4-8

The poll lists that you have created are listed in the **AVAILABLE POLL LISTS** list box.

Note: *To create a poll list, see Section 5.1.1, Creating a Poll List from the Poll List Maintenance Screen.*

You can assign any of the poll lists in this list box. You can also see when the poll list is scheduled to run and the commands associated with it.

5	From the **AVAILABLE POLL LISTS** list box, select the poll list you want to assign to your phone.	
6	Click on **ADD**.	The poll list is copied to the **CURRENT POLL LISTS** list box for your phone.
7	To view when the poll list is scheduled to run, select the poll list you want to view.	
8	Click on **SCHEDULE**.	The **POLL SCHEDULE** screen displays the days and time the poll list is scheduled to run. *Figure 4-9*.

Note: *You can modify the poll schedule by clicking on the day or date and entering the time you want the poll schedule to run. Section 5.1.3, Updating the Poll List, shows you how to access and update a poll schedule from the POLL LIST MAINTENANCE screen.*
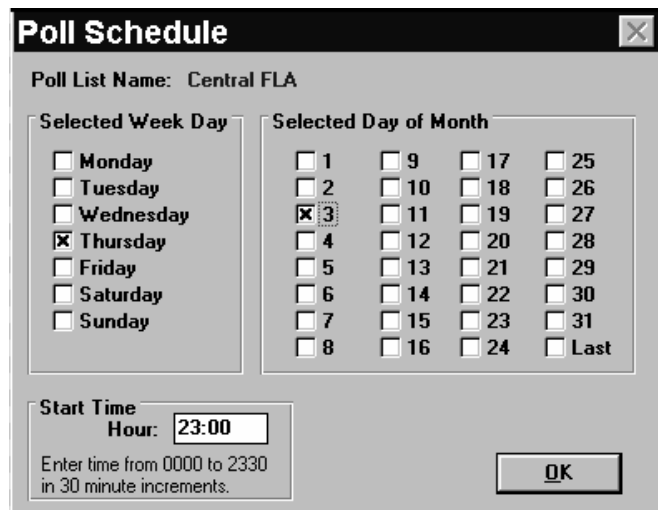
Figure 4-9

9	Click on **OK**.	Returns the **ASSIGN POLL LIST** screen. *Figure 4-8*.
10	To view the commands associated with a poll list, select the poll list you want to view.	

11	Click on **VIEW CMDS**.	The **POLL LIST COMMANDS** screen displays the commands that the poll list is programmed to run. *Figure 4-10*.

> **Note:** *Different poll list commands are available for each phone model type (i.e. Series 5/5501, KX-5502). Select the tab for the phone type you need.*

> **Note:** *You can activate or deactivate commands associated with the poll list by clicking on them. Section 5.1.3, Updating the Poll List, shows you how to access and update poll list commands from the **POLL LIST MAINTENANCE** screen.*
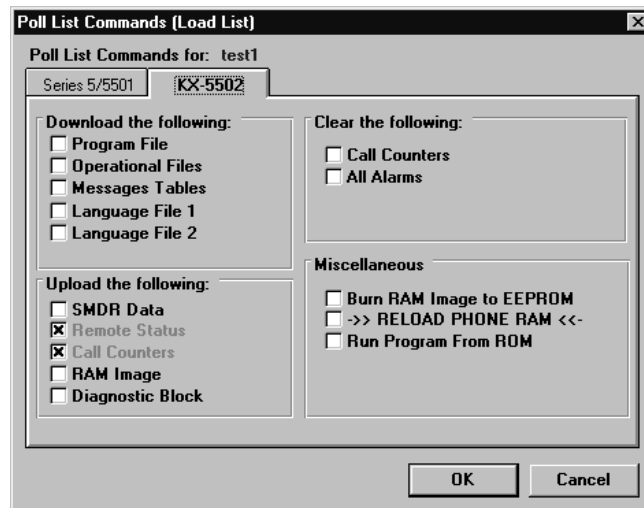
Figure 4-10

12	Click on **OK**.	Returns the **ASSIGN POLL LIST** screen. *Figure 4-8*.
13	Click on **OK**.	The phone is added to the poll list. Returns the **PHONE DETAIL** screen. *Figure 4-7*.
14	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1.*
15	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.3.4 ASSIGNING COMMANDS TO A PHONE

You select the commands you want PNM Plus to execute on your payphone by setting commands in the following command types (see Section 5.3, *Dialing your Payphone*):

Command Type	Description
Incoming	Commands on the phone's Incoming list are executed by PNM Plus when the phone calls IN to PNM Plus. Commands are executed by the Poll Manager.
Outgoing	Commands on the phone's Outgoing list are executed by PNM Plus when a call is placed by PNM Plus to the phone.
Next Contact	Commands on the Next Contact list are executed during the next incoming or outgoing call to the payphone. Commands on the Next Contact list are performed only once. Following execution of the commands found on the Next Contact list, PNM Plus resets the list and deselects all commands. The Next Contact list permits selection of the Reset Totalizer command and entry of the new Totalizer Amount.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.
3	Click on **CMD LIST**.	The **COMMAND LIST** screen appears. *Figure 4-11*.
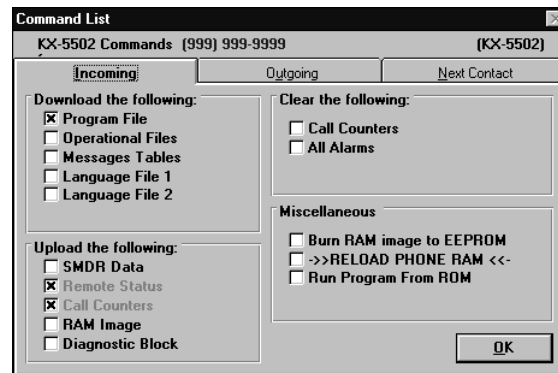
Figure 4-11

4	Display the commands associated with an individual phone by selecting the tab of the command list type you want (i.e., Incoming, Outgoing, or Next Contact).	
5	Select commands by clicking on the desired check box.	
6	Click on **OK**.	The commands are assigned to the phone. Returns the **PHONE DETAIL** screen. *Figure 4-7*.
7	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.3.5 SETTING PAYPHONE REGISTERS AND OPTIONS

Registers and options are the instructions you want your phone to follow. For example, you can instruct your phone to report specific alarms and to disallow 976 calls. Registers are instructions you assign a numerical value, and Options are instructions you can turn *on* or *off*.

For information on creating templates with specified registers and options, see Section 8.1, *Managing Registers and Options Templates*. See the *Features Reference* document related to your phone model type for a listing and description of all registers and options.

You set registers and options at the **REGISTERS AND OPTIONS** screen (see Figure 4-12).
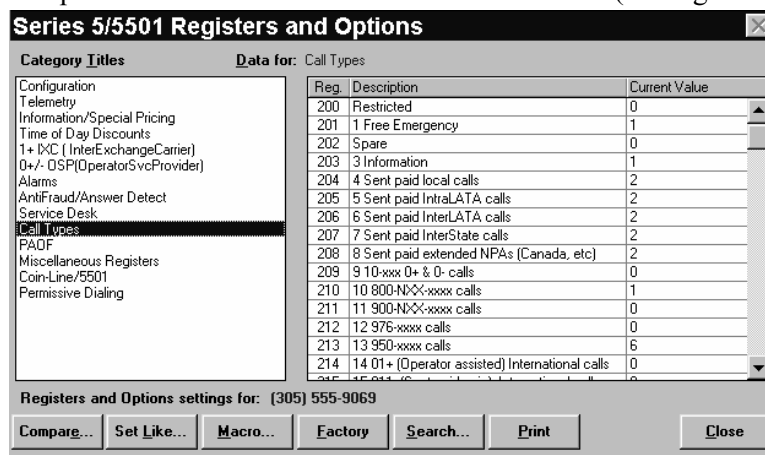
Figure 4-12

The **REGISTERS AND OPTIONS** screen is divided into two halves. The left side contains a scrolling list of categories of registers and options. The category titles can be left set to the factory defaults defined by Elcotel, or you can modify them. You can change the category titles by using the Configuration function of this program. See Section 7.3.5, *Configuring the Registers and Options Display*.

The right side of the screen contains a list of registers or options contained within the selected category. The column labeled *Current Value* contains the present database content for the register or option displayed.

You can tab into the cell containing the present value and change it to a new value. As you tab into the cell, the program displays a prompt at the top of the column to inform you of the permitted range of values for that register or option. The program rejects values outside this range, and the original value prior to your changes is restored.

Movements of program controls on this screen are defined below.

Category Titles	Click on a category in this list to display its registers and options.
	Move to the next or previous category in the list by pressing the up and down arrow keys.
	Move directly to a category by entering the first letter of that category. In case multiple category titles have the same first letter, repeat the letter to skip to the next matching entry in the list.
Registers and Options	Press the <TAB> key to move to the next cell in the list.
Current Value	Move to the next or previous current value in the list by pressing the up and down arrow keys.
	Move to the bottom or top of the current value list by pressing the <PG DN> or <PG UP> key. When you are positioned at the last or first entry for a category, press the <PG DN> or <PG UP> key to skip to the next entry in the **CATEGORY TITLES** list box.
	Press <Alt + T> to position the cursor in the **CATEGORY TITLES** list box.
	Press <Alt + D> to position the cursor in the **REGISTERS AND OPTIONS** list box.

4.3.5.1 Comparing Registers and Options

PNM Plus enables you to compare the values of a phone's registers and options with the values in a RAM image, in another phone, in a template, or in the factory default settings. You can then change the values in the phone to the values of the RAM image, phone, template, or factory default.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.

3	Click on **REGOPT**.	If you have not already set registers and options for the phone, the **SET REG/OPTS TO BE LIKE** screen appears. *Figure 4-13*. See Section 4.3.5.2, *Setting a Payphone's Registers and Options to Match a Model*.
		If you have already set registers and options for the phone, the **REGISTERS AND OPTIONS** screen appears with values for this phone's registers and options. *Figure 4-12.*
4	Go to Section 8.1.4, *Comparing Registers and Options*, step 6.	

4.3.5.2 Setting a Payphone's Registers and Options to Match a Model

You can set the current payphone's registers and options to look like those of another payphone or like those of a template. The template can contain factory default settings, or it can contain settings you have entered (see Section 8.1, *Managing Registers and Options Templates*).

Note: *You can only set the payphone's registers and options to match a phone of similar model type. For example, you cannot set a Series 5/5501 phone to match a KX-5502 phone. This is because the available registers and options are different for each phone type.*

There are several reasons you might want to set a payphone's registers and options to match those in another phone or template, including the following:

- You are adding a second phone to a location and need to make it identical to the first except for the ANI and Phone ID.

- You are installing a new phone in a neighborhood where another phone has worked well with its register settings, so you want to start the new phone with the same values as that phone.

- You have created a template of registers and options values appropriate for *any* phone in the 305-289 exchange. When you add a new phone or an exchange that shares the same C.O., you can set the initial registers and options values to the template setting.

- You have a phone that has been working reliably but now you think settings might have been altered through the keypad. You can set the phone's registers and options back to values in a template or to values in a neighboring phone.

When you set a phone's registers and options to match another phone or a template, the ANI or template name will be recorded as the new phone's **BASE TEMPLATE**. This is displayed on the **PHONE DETAIL** screen near the upper right corner (see Figure 4-7). The new phone's actual registers and options may change, but the Base Template will still be displayed to show you the starting point for your phone.

Note: *Changes made to the registers and options of the template or original ANI after the set like function is completed **will not** be reflected on the new phone.*

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database, double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*. To enter a phone into the database, see Section 4.3.2, *Adding a Phone to the Database*.
3	Click on **REGOPT**.	If you have not already set registers and options for the phone, the **REGISTERS AND OPTIONS** screen appears with the factory default values for this phone's Registers and Options. *Figure 4-12*. If you have already set registers and options for the phone, the **REGISTERS AND OPTIONS** screen appears with values for this phone's Registers and Options. *Figure 4-12.*
4	Click on **SET LIKE.**	The **SET REG/OPTS TO BE LIKE** screen pops up with a list of available templates and other payphones you can select to use as a model. *Figure 4-13*.

Figure 4-13

5	Select a template entry or a payphone model and then click on **OK**.	Returns the **REGISTERS AND OPTIONS** screen. *Figure 4-12*. The registers and options assigned to the template or phone are assigned to your phone.
6	Click on **CLOSE**.	Returns the **PHONE DETAIL** screen. *Figure 4-7*.
7	Click on **OK**.	The **STOP-**download warning screen appears. *Figure 8-1*. See Chapter 8, *Managing Payphone Configuration*, for downloading instructions. If no changes have been made, the **NAVIGATION** screen returns. *Figure 4-1*.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.3.5.3 Setting Macros for a Payphone

The Series 5/5501 payphone and KX-5502 phones running KX 1.2 firmware or earlier provide storage for six user-defined macros in addition to the standard set of macros supplied by Elcotel.   For KX-5502 phones running KX 1.3 firmware, you can store up to 20 user-defined macros. Refer to your firmware manual to see which register and option numbers are associated with these macros. PNM Plus enables you to use the **MACROS** screen to select from the list of user-defined macros.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.
3	Click on **REGOPT**.	The **REGISTERS AND OPTIONS** screen appears with values for this phone's registers and options. *Figure 4-12*.
4	Click on **MACRO.**	The **MACROS FOR** screen appears. *Figure 4-14*.

Figure 4-14

5	Click on one of the numbered lines on the top section of the screen.	**Note:** *These are labeled 45 - 50 for Series5/5501 and KX-5502 phones running KX 1.2 firmware or earlier, or 45 - 64 for KX-5502 phones running KX 1.3 firmware.*
6	Click in the far right portion of the **NAME** field for the chosen line to activate the drop down list arrow**.** Select the macro name to associate with this number from the drop down list.	The **COMMANDS** field is automatically filled in with the commands associated with this macro. The scroll box at the bottom of the screen provides reference information about each command.
		Note: *If you need to create a macro,see Section 8.4.2, Creating a User Defined Macro.*

7	After you have assigned names to all macro numbers of interest, click on **OK** to save the data to disk for downloading to the payphone.	**Note:** *This screen enables you to select macros you have previously defined, and assign numbers to them. The macros themselves are defined in PNM Plus using techniques described in Section 8.4, Managing User-Defined Call Processing Macros.* Returns the **REGISTERS AND OPTIONS** screen. ***Figure 4-12***.
8	Click on **CLOSE**.	The macros are set for your payphone. Returns the **PHONE DETAIL** screen. ***Figure 4-7***.
9	Click on **OK**.	The **STOP**-download warning screen appears. ***Figure 8-1***. See Chapter 8, *Managing Payphone Configuration*, for download instructions.

4.3.5.4 Displaying Elcotel Factory Descriptions for Registers and Options

PNM Plus gives you the ability to customize the descriptions of registers and options. For example, you can choose to relabel Register 343 and give it a description that is more meaningful to you than the one provided by Elcotel.

This capability has the potential to create a problem, however, if you are ever involved in a phone call to Elcotel's Customer Service. While looking at your personal descriptions of registers and options, the text you read will be unfamiliar to the Service Technician. To eliminate the confusion this situation can cause, a feature exists that temporarily restores the registers and options descriptions to the values set at the Elcotel factory.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	After you have entered the phone into the PNM Plus database (see *Section 4.3.2, Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click **DETAIL**.	The **PHONE DETAIL** screen appears. ***Figure 4-7***.
3	Click on **REGOPT**.	The **REGISTERS AND OPTIONS** screen appears with values for this phone's Registers and Options. ***Figure 4-12***.
4	Click on **FACTORY**.	The Elcotel factory descriptions appear.
5	To return to the descriptions you defined, click on **USER**.	
6	Click on **CLOSE**.	Returns the **PHONE DETAIL** screen. ***Figure 4-7***.
7	Click on **OK**.	Returns the **NAVIGATION** screen. ***Figure 4-1***.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1***.

4.3.5.5 Searching for a Register, an Option, or a Group of Registers or Options

The customized display of registers and options you have set up on your system might not include all available registers and options. For this reason, the **REGISTERS AND OPTIONS LOOKUP** screen is provided. This screen lets you enter a register or option (by number) or a description or partial description of the register or option and then instruct the program to search it for you.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.
3	Click on **REGOPT**.	The **REGISTERS AND OPTIONS** screen appears with values for this phone's registers and options. *Figure 4-12*.
4	Click on **SEARCH.**	The **REGISTERS & OPTIONS LOOKUP** screen appears (see *Figure 4-15*).
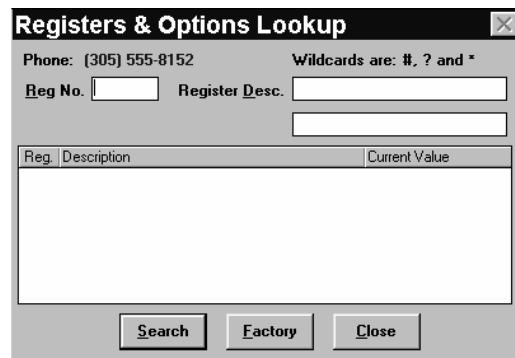
Figure 4-15

5	To search for a single register or option, enter the three-digit Register or Option number in the **REG NO**. field.	
6	Click on **SEARCH**.	The register or option appears in the lower half of the screen.

7	To search for a group of registers and options, enter a partial description (keyword) in the **REGISTER DESC**. field.	For example, you can enter **SERVICE DESK** to search for all registers and options containing the keyword **SERVICE DESK**. Wildcards are available to help fill in unknown fields of the register description. # May be used to replace a single numeric character. ? May be used to replace a single alpha character. * May be used to replace word or group of characters.
8	Click on **SEARCH**.	Figure 4-16 displays the result of a search for registers and options containing the keyword *Service Desk*. *Figure 4-16* You can alternate the Register Description between the user defined description and the Elcotel Factory description by clicking on **FACTORY** and **USER**. You can change the value of the user defined registers and options by clicking in the cell containing the register's *Current Value* and entering the new value.
9	Click on **CLOSE**.	Returns the **REGISTERS AND OPTIONS** screen. *Figure 4-12*.
10	Click on **CLOSE**.	Returns the **PHONE DETAIL** screen. *Figure 4-7*.
11	Click on **OK**.	If you made any changes to the register and option settings, the **STOP**-download warning screen appears. *Figure 8-1*. See Chapter 8, *Managing Payphone Configuration*, for download instructions. If you did not make any changes, the **NAVIGATION** screen returns. *Figure 4-1*.
12	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.
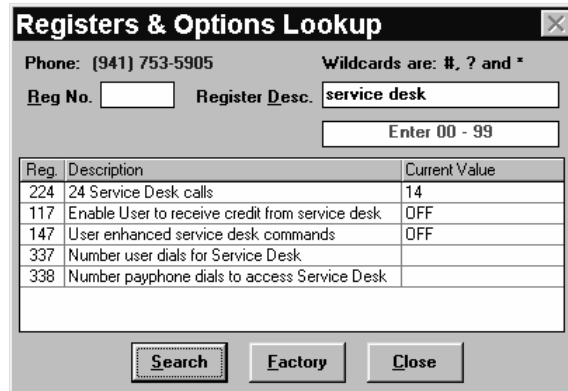
4.3.6 ASSIGNING A RATES FILE TO A PHONE

You need to assign a Rates file to your phone so your phone knows how much money the payphone user needs to insert for different types of calls. For example, the payphone needs to know how much per minute to charge the payphone user for a long distance call. A Rates file programs these amounts into the phone.   For information on how to create and edit a Rates file, see Section 8.2, *Managing Rate Files*.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database, double click on the phone from the **PHONES** list box or click on the phone then click **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*. To add a phone to the database, see Section 4.3.2, *Adding a Phone to the Database*.
3	Click on **RATES**.	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 4-17*.

Figure 4-17

4	Click on the box to the left of the file you want.	This will highlight the file.
5	Click on **ASSIGN TO PHONE**.	The Rate file is assigned. Returns the **PHONE DETAIL** screen with the name of the file next to the **RATES** button. *Figure 4-7*.
6	Click on **OK**.	The **STOP-**download warning screen appears notifying you that the modifications you have made must be downloaded to the phone. *Figure 8-1*.See Chapter 8, *Managing Payphone Configuration*, for downloading instructions. If no modifications have been made, the **NAVIGATION** screen returns. *Figure 4-1*.

4.3.7 ASSIGNING A PRIORITY PARSING FILE

You can assign a Priority Parsing file to your phone so your phone can redistribute or vary the processing of calls based on the digits dialed. With Priority Parsing, you can identify the dialing pattern for each call and create user-defined pricing, macros, call types, and call completion timers. In addition, Priority Parsing enables you to determine if a dialing pattern should be re-routed or blocked. For information on creating and editing Priority Parsing files, see Section 8.5, *Managing Priority Parsing Functions*.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	After you have entered the phone into the PNM Plus database, double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL.**	The **PHONE DETAIL** screen appears. ***Figure 4-7***. To add a phone to the database, see Section 4.3.2, *Adding a Phone to the Database*.
3	Click on **PRI PAR**.	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. ***Figure 4-18***. *Figure 4-18*
4	Click on the box to the left of the file you want.	This will highlight the file.
5	Click on **ASSIGN TO PHONE**.	The Priority Parsing file is assigned. Returns the **PHONE DETAIL** screen with the name of the file next to the **PRIPAR** button. ***Figure 4-7***.
6	Click on **OK**.	The **STOP-**download warning screen appears notifying you that the modifications you have made must be downloaded to the phone. ***Figure 8-1***. See Chapter 8, *Managing Payphone Configuration*, for instructions on downloading the newly assigned files. If no modifications have been made, the **NAVIGATION** screen returns. ***Figure 4-1***.

4.3.8 ASSIGNING A SPEED DIAL FILE

You can assign a Speed Dial file to your phone so the Payphone user can quickly dial out a convenience number (e.g., dial for TAXI service). A speed dial file also enables you to customize the phone to suit the customer's requirements of convenience. For information on creating and editing Speed Dial files, see Section 8.6, *Managing Speed Dial Numbers*.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	After you have entered the phone into the PNM Plus database, double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. ***Figure 4-7***. To enter a phone into the database, see Section 4.3.2, *Adding a Phone to the Database*.
3	Click on **SPEED**.	The **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen appears. ***Figure 4-19***.

Figure 4-19

4	Click on the box to the left of the file you want.	This will highlight the file.
5	Click on **ASSIGN TO PHONE**.	The Speed Dial file is assigned. Returns the **PHONE DETAIL** screen with the name of the file next to the **SPEED** button. ***Figure 4-7***.
6	Click on **OK**.	The **STOP-**download warning screen appears notifying you that the modifications you have made must be downloaded to the phone. ***Figure 8-1***. See Chapter 8, *Managing Payphone Configuration*, for instruction on downloading the newly assigned files. If no modifications have been made, the **NAVIGATION** screen returns. ***Figure 4-1***.

4.3.9 ASSIGNING A PROGRAM FILE

If you need to upgrade your phone to a newer version of software, you can replace the chip in your phone containing the software or you can use PNM Plus to write over the chip. To use PNM Plus to write over the chip, click on **PROGRAM** at the **PHONE DETAIL** screen and select the software version you want to download.

4.3.10 ASSIGNING A REP/CARD TEMPLATE

You can assign a Rep/Card template to give your phone a pre-defined set of repertory dialing patterns and credit/debit card tables. The repertory dialer buttons offer your customers speed dial features for commonly used numbers. Credit/debit card tables give you quick access to an internal source of approval/disapproval tables for known card numbers. For information on creating and editing Rep/Card template files, see Section 8.8, *Managing Repertory Dialer & Credit/Debit Card Templates*.

Note: *Series 5/5501 model phones do not support repertory dialers or credit/debit card templates.*

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Once the phone has been entered into the PNM Plus database, double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*. To enter a phone into the PNM Plus database, see Section 4.3.2, *Adding a Phone to the Database*,
3	Click on **REP/CARD** button.	The **REP/CARDS TEMPLATES** screen appears.*Figure 4-20*.
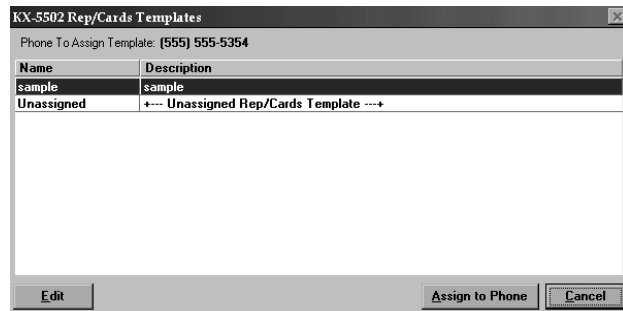
Figure 4-20

4	Click on the template to be assigned.	
5	Click on **ASSIGN TO PHONE**.	Returns the **PHONE DETAIL** screen with the name of the file next to the **REP/CARD** button. *Figure 4-7*.
6	Click on **OK**.	The **STOP-**download warning screen appears. *Figure 8-1*. See Chapter 8, *Managing Payphone Configuration*, for downloading instructions. If no modifications have been made, the **NAVIGATION** screen returns. *Figure 4-1.*

4.3.11 ASSIGNING A MESSAGE TEMPLATE

Note: *This feature is only available with KX phones.*

The KX-5502 payphone has the capability to display scrolling messages during its operation. These messages are stored in templates that can be assigned to individual phones. Each template can hold as many as 40 messages, 20 for advertising and 20 for repertory dialing instructions, with each message having up to 50 characters. The following procedure shows how to assign a message template to a specific KX phone. To create a message template, see Section 8.7.1, *Creating a Messages Template*.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	Once the phone has been entered into the PNM Plus database, double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. ***Figure 4-7***. To add a phone to the database, see Section 4.3.2, *Adding a Phone to the Database*.
3	Click on **MESSAGES** button.	The **KX-5502 SCROLLING MESSAGES TEMPLATES** screen appears. ***Figure*** . *Figure 4-21*
4	Click on the template to be assigned to this phone.	
5	Click on **ASSIGN TO PHONE**.	Returns the **PHONE DETAIL** screen with the name of the file next to the **MESSAGES** button.
6	Click on **OK**.	The **STOP-**download warning screen appears notifying you that the modifications you have made must be downloaded to the phone. ***Figure 8-1***. See Chapter 8, *Managing Payphone Configuration*, for instruction on downloading the newly assigned files. If no modifications have been made, the **NAVIGATION** screen returns. ***Figure 4-1***.

4.3.12 ASSIGNING A VOICE FILE

If you are using Elcotel's PAOF^{TM} (Payphone Automated Operator Function) store and forward, you can select a voice brand file, if used, by clicking on **VOICE** at the **PHONE DETAIL** screen and then selecting the voice file you want to download to the payphone. Contact Elcotel Coinless Services Department for further information.

Note: *Model KX-5502 phones do not support voice brand files or PAOF.*

4.3.13 ASSIGNING A LANGUAGE FILE

KX-5502 phones running 1.3 firmware come supplied with two language files, English (primary) and Spanish (secondary). You control which language file the phone uses by adjusting your phone's Registers and Options. Refer to your *KX Firmware Operation Manual Volume 2: Feature Set, Version 1.3* for specific information on KX 1.3 Registers and Options. For instructions on setting your phone's Registers and Options, see Section 4.3.5, *Setting Payphone Registers And Options*.

At this time, KX 1.3 supports the download of one additional language file, French. Once you download the new file, it will replace the secondary language file currently recognized by your KX 1.3 phone. For example, if you download the French language file supplied with PNM Plus, French will replace Spanish as your secondary language file. Once French becomes your secondary language file, your phone cannot use the Spanish language file until you redownload it and replace the French file.

Note: *You cannot replace English as the primary language file*.

You assign a language file for download in the **PHONE DETAIL** screen (Figure 4-7). Since you can only assign one additional language file to a phone, you should only assign a file to be downloaded from the **LANGUAGE I** drop down list, leaving **LANGUAGE II** unassigned. If you assign files to both **LANGUAGE I** and **LANGUAGE II**, the file assigned to **LANGUAGE II** will replace the file assigned to **LANGUAGE I** when the files are downloaded.

4.3.14 ASSIGNING A CHARGED RATES TEMPLATE

You can assign a Charged Rates template to give your phone a pre-defined set of expense tables. These tables are used to track common payphone expenses. Charged Rate tables give you quick access to changing your operation cost on all, or a group, of your payphones. The expenses are tracked and can be accessed through PNM Plus Reports (report 31). For information on creating and editing Charged Rates template files, see *Section 9.5, Estimating Payphone Expenses.*

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.

3	Click on the **LEC/LD RATES** drop-down list in the **ESTIMATED CHARGES** field and select a charged rates template.	For information on creating and editing Charged Rates template files, see Section 9.5, *Estimating Payphone Expenses*.
4	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
5	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.3.15 ASSIGNING A TAX RATE TEMPLATE

You can assign a Tax Rate template to give your phone a pre-defined set of tax tables. These tables are used to estimate your tax payments based on the call type. PNM Plus contains the data on all calls made from your payphones, and can estimate the tax payment required by the federal and local government. You can customize your templates for phones inside or outside city limits, or across county or state lines where taxes may differ. The taxes are tracked and can be accessed through PNM Plus Reports (report 32). For information on creating and editing Tax Rate template files, see *Section 9.5, Estimating Payphone Expenses.*

Note: *These tables produce an __estimate__ of the required call type tax.*

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.
3	Click on the **CALL TYPE TAX RATES** drop-down list in the **ESTIMATED CHARGES** field and select a tax rates template.	For information on creating and editing Tax Rate template files, see Section 9.5, *Estimating Payphone Expenses*.
4	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
5	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.3.16 VIEWING THE STATUS OF PAYPHONE OPERATIONAL FILES

You can change the data values in a payphone's operational file and save the new value to the database, but the change does not affect the operation of the payphone until the data has been downloaded to the payphone. You can determine the dates and times each of the operational files were last modified and saved in the database and compare that information to the last time the data was downloaded to the payphone.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7*.
3	Click on **DATES**.	The **OPERATIONAL FILE DATES** screen contains the dates that each operational file was modified and when each was last downloaded. *Figure 4-22*.
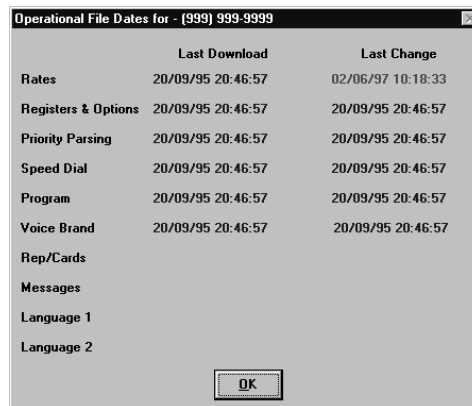
Figure 4-22

Note: *Any time the program encounters the date **01/01/ 1980**, it assumes that a download has never been done and displays the message **Never Downloaded**.*

4	Click on **OK**.	Returns the **PHONE DETAIL** screen. *Figure 4-7*.
5	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.3.17 PROCESSING NOTES FOR A PHONE

You can access an optional facility for storing and viewing up to 1024 characters of a phone's free-form notes through the **PHONE DETAIL** screen. You can view existing notes, add new notes, change the content of existing notes, and delete notes using this facility.

The **PHONE DETAIL** screen contains one of these two icons: **Notes** or **Notes**.

The first icon indicates there are presently no notes on file for this phone. The second icon indicates that notes are in the database and are available for viewing.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	After you have entered the phone into the PNM Plus database (see Section 4.3.2, *Adding a Phone to the Database*), double click on the phone from the **PHONES** list box or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears. *Figure 4-7.*
3	To add notes, click on the **Notes** icon.	The **NOTES** screen appears. *Figure 4-23*. *Figure 4-23*
4	Add new notes data.	
5	Click on **OK**.	Returns the **PHONE DETAIL** screen. *Figure 4-7.*
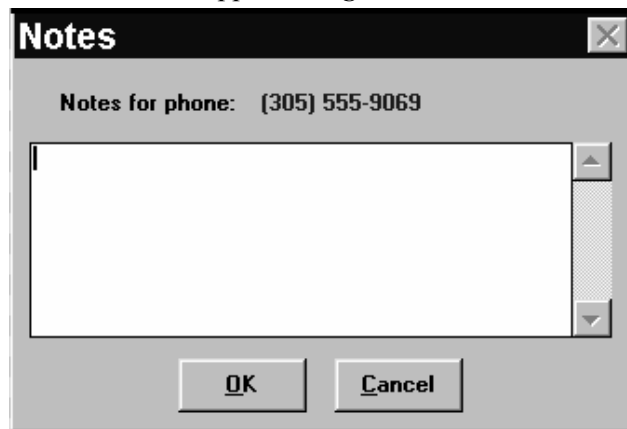
6	To view notes, click on the ![Notes icon] **Notes** icon.	The **NOTES** screen appears. *Figure 4-24*.

Figure 4-24

7	Read the notes in the screen.	
8	Click on **OK** or **CANCEL.**	Returns the **PHONE DETAIL** screen. *Figure 4-7*.
9	To delete notes, click on the ![Notes icon] **Notes** icon.	The **NOTES** screen appears. *Figure 4-24*.
10	Erase all notes in the **NOTES** screen (including all blanks and spaces).	
11	Click on **OK.**	Returns the **PHONE DETAIL** screen. *Figure 4-7*. The **NOTES** icon should change to show that there are no notes for this phone.
12	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
13	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.4 Completing the Payphone Network

Once you have used the **PHONE DETAIL** screen to add a phone to the database and assign a polling list, commands, and operational files, you need to complete your payphone network. You complete your payphone network from the **NAVIGATION** screen by connecting each level of the screen's hierarchy from the bottom up. To connect each level, you need to perform the following tasks:

- Assign the phone to a site.

- Assign a contract to the site.

- Assign a route to the site.

- Assign a customer to the contract.

- Assign a technician to the route.

Before you can assign these elements to each other, you need to add one or more sites, routes, technicians, contracts, and customers to the database. The following sections show you how to add these elements to the database and then how to make the assignments.

4.4.1 ADDING A SITE TO THE DATABASE

The site is where your payphone is located. Once you add the payphone to the PNM Plus database through the **PHONE DETAIL** screen, you need to add the phone's site to the database.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	Double click on the **NAVIGATION** screen **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears. ***Figure 4-25***.

Figure 4-25

3	Click on **NEW SITE**.
4	Enter the site name in the **SITE NAME** field.
5	Enter the site address in the **ADDRESS** and **CITY/ST/ZIP** fields.

6	Enter the name of the site contact person in the **CONTACT** field.	
7	Enter the contact person's phone number in the **PHONE** field.	
8	Use the **CONTRACT** field drop down list to assign a contract to the site.	To add a contract to the database, see Section 4.4.5, *Adding Contracts and Customers to the Database*. To assign a contract to a site, see Section 4.4.7, *Assigning a Contract to a Site*.
9	Use the **ROUTE** field drop down list to assign a site to a route.	To add a route to the database, see Section 4.4.3, *Adding a Route to the Database*. To assign a site to a route, see Section 4.4.8, *Assigning a Site to a Route*.
10	In the **TIME ZONE** field drop down list, select the offset in hours from your local time for the payphone location.	This information is used during polling the payphone so it stays within the polling window you set up.
11	If a site observes daylight savings time, select the **OBSERVES DAYLIGHT SAVINGS** check box.	This flag is used during polling to ensure the polling window is observed.
12	To help anyone unfamiliar with the territory locate a site, you can enter grid coordinates from a city map (such as E10/B6) in the **MAP COORD** field.	This entry is optional.
13	The **SITE ID** field contains a number assigned by PNM Plus to help identify specific sites. It may be useful for accounting purposes.	This read only entry is assigned by PNM Plus.
14	If the site requires special handling, select the **THIS IS A CRITICAL SITE** flag.	You define what *special handling* means. The program alerts you any time the site appears on the **NAVIGATION** screen as needing special attention.
15	In the **SITE VARIABLES** drop down lists, you can select three data items of user-defined information.	The titles associated with these three data items can be set in the **GENERAL** tab of the **CONFIGURATION** screen (see Section 7.3.2, *Setting General System Options*).
16	In the **PREFIX** field, enter PBX codes used to get out of your location or IXC authorization codes as needed for outbound calls.	This data item is used to store dialed digits used in front of the payphone's ANI when calling a phone at this site *from the Operator Console* or *by the Poll Manager.* This data is not downloaded to the phone and only applies to calls from your location to the phone.

17	From the **PATTERN** field drop down list, enter the digit pattern to be used when calling a payphone at the site.	The payphone ANI is stored in the database as a 10-digit number, but if the site is local to your office, you can dial only the last 7 digits. If the site is more distant, you can set this data item to indicate a *1* prefix to the dialed ANI.
18	Click on **OK**.	The site is added to the database. Returns the **NAVIGATION** screen. *Figure 4-1*.
19	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.4.2 FINDING A SITE IN THE DATABASE

At times, it is necessary to locate a particular site in your database so you can assign new phones to that site, change the settings for phones already at that site, and so on. This can be done using the **FIND SITE** button on the **SITE DETAIL** screen.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double-click on the **SITE** icon or click on the **SITE** icon once and then click on **DETAIL**.	The **SITE DETAIL** screen appears. *Figure 4-25*.
3	Click on **FIND SITE.**	The **FIND A SITE** selection box appears. *Figure 4-26*.
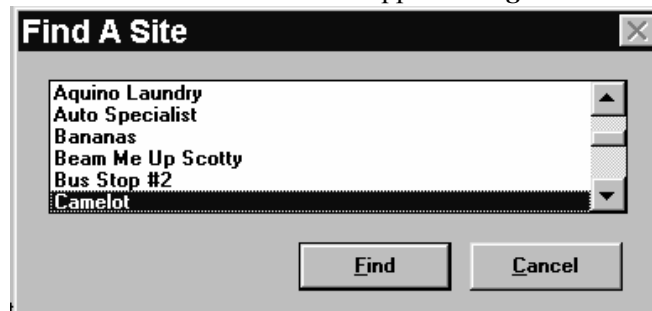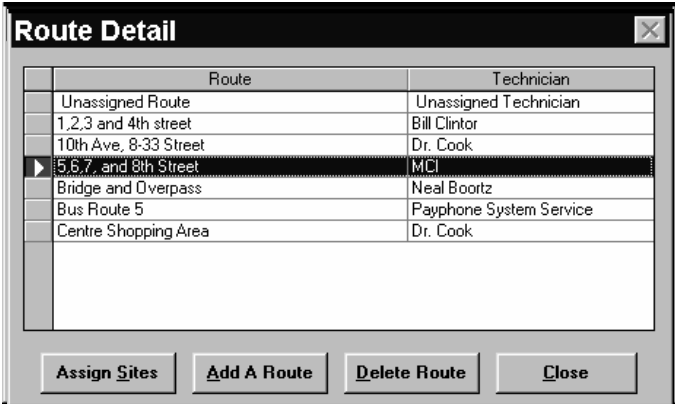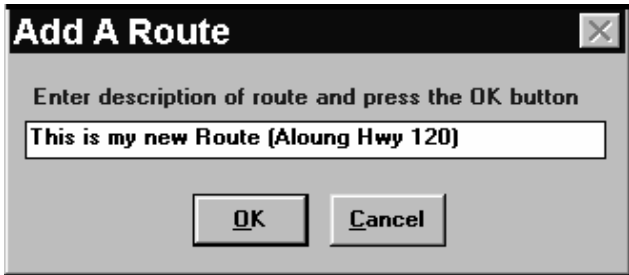
Figure 4-26

4	Scroll through the list of sites and click on the desired entry, then click on **FIND**.	The **SITE DETAIL** screen reappears, with the selected site entries displayed. *Figure 4-25.*

4.4.3 ADDING A ROUTE TO THE DATABASE

A route consists of a number of sites that have been grouped together. A route is usually assigned to a technician, who services all the sites on a route. Since the sites in a route are usually close together, the technician who is assigned a route can service more than one site quickly and efficiently.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double-click on the **ROUTE** icon or click on the **ROUTE** icon once and then click on **DETAIL**.	The **ROUTE DETAIL** screen appears. *Figure 4-27*.

Figure 4-27

3	Click on **ADD A ROUTE**.	The **ADD A ROUTE** screen appears. *Figure 4-28*.

Figure 4-28

4	Enter the name of the new route.	
5	Click on **OK**.	The route appears in the **ROUTE DETAIL** screen with an unassigned technician. To assign a technician, see Section 4.4.9, *Assigning a Technician to a Route*.
		You can edit a route description at the **ROUTE DETAIL** screen by clicking inside the route description and entering the new route. You can delete a route by clicking on the box to the left of the route and then clicking on **DELETE ROUTE**.
6	Click on **CLOSE**.	The route is added to the database. Returns the **NAVIGATION** screen with the route you added displayed in the **ROUTES** list box. *Figure 4-1*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.4.4 ADDING A TECHNICIAN TO THE DATABASE

The technician is the person you hire to service your phones.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double-click on the **TECHNICIAN** icon or click once on the **TECHNICIAN** icon and then click on **DETAIL**.	The **TECHNICIAN DETAIL** screen appears. *Figure 4-29*.

Figure 4-29

3	Click on **NEW**.	
4	The **TECHNICIAN ID** field contains a number assigned by PNM Plus to help identify specific technicians. It may be useful for accounting purposes.	This read only entry is assigned by PNM Plus.
5	Enter the technician's name in the **NAME** field.	
6	Enter the technician's address in the **ADDRESS** and **CITY STATE/ZIP** fields.	
7	Enter the technician's CB Handle (e.g., Big Daddy) in the **CB HANDLE** field.	
8	Enter the technician's social security number in the **SSN** field.	
9	Enter the technician's phone numbers in the **PHONES** fields.	Once you assign a technician to a route, the route appears in the **ROUTES** field. You can click on **VIEW** to display the **ROUTE DETAIL** screen and change or add routes assigned to a technician. See Section 4.4.9, *Assigning a Technician to a Route*.

10	Click on **OK**.	The technician is added to the database. Returns the **NAVIGATION** screen with the technician you added displayed in the **TECHNICIAN** list box. *Figure 4-1*.
		Note: *At the TECHNICIAN DETAIL screen, you can modify information on an existing technician by double clicking on the technician in the TECHNICIAN LIST box and then editing the necessary fields.*
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.4.5 ADDING CONTRACTS AND CUSTOMERS TO THE DATABASE

You add contracts to the database by completing the fields in the **CONTRACT DETAIL** screen. You add customers to the database by completing the fields in the **CUSTOMER DETAIL** screen.

4.4.5.1 Adding Contracts to the Database

From the **OPERATOR CONSOLE** screen:

| **1** | Click on the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. *Figure 4-1*. |
| **2** | Double-click on the **CONTRACT** icon or click once on the **CONTRACT** icon and then click on **DETAIL**. | The **CONTRACT DETAIL** screen appears. *Figure 9-12*. See Section 9.4.2.1, *Entering a New Contract*, Step 3 through Step 8, for information on using this screen to add contracts to the database. |

4.4.5.2 Adding Customers to the Database

From the **OPERATOR CONSOLE** screen:

| **1** | Click on the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. *Figure 4-1*. |
| **2** | Double-click on the **CUSTOMER** icon or click once on the **CUSTOMER** icon and then click on **DETAIL**. | The **CUSTOMER DETAIL** screen appears. *Figure 9-9*. See Section 9.4.1.1, *Adding a Customer to the Database*, Step 3 through Step 7, for information on using this screen to add contracts to the database. |

4.4.6 ASSIGNING PHONES TO A SITE

If you have added more than one site, route, technician, customer, or contract to your database, you need to make assignments among these elements based on the hierarchy in the **NAVIGATION** screen. For example, if you have added more than one site, you need to assign your phone to one of the sites.

The first assignment you make, beginning at the bottom of the hierarchy, is to assign your payphone to a site.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	Click on the **SITE** icon.	The sites you have added to the PNM Plus database appear in the **SITES** list box (see Section 4.4.1, *Adding a Site to the Database*).
3	In the **SITES** list box, click on the site where the phone is located.	The Site name appears in the **SITE** icon.
4	Double click on the **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears. ***Figure 4-26***.
5	Click on **ASSIGN PHONES**.	**Note:** *You can choose to add a new phone from the **SITE DETAIL** screen by clicking on **NEW PHONE** to display the **PHONE DETAIL** screen. See Section 4.3.2, Adding a Phone to the Database**.*

The **ASSIGN PHONES TO SITE** screen appears. ***Figure 4-30***.

Figure 4-30

6	In the **UNASSIGNED PHONES** list box, select the phone you want to add.	
7	Click on **ADD**.	The phone is moved to the **PHONES AT SITE** list box.
		You can repeat this procedure to add more than one phone.
8	Click on **OK**.	The phone is assigned to the site. Returns the **SITE DETAIL** screen with the phone you assigned displayed in the **PHONES AT SITE** window. ***Figure 4-26***.

9	Click on **OK**.	Returns the **NAVIGATION** screen with the phone you assigned displayed in the **PHONE** icon. *Figure 4-1*. If there is more than one phone assigned to the site, click on the **PHONE** icon to display the phones.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

The next level of the Payphone Network hierarchy is to assign a contract to a site and a site to a route. You perform these processes at the **SITE DETAIL** screen (see Figure 4-26). These processes are discussed in the following sections.

4.4.7 ASSIGNING A CONTRACT TO A SITE

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Click on the **SITE** icon.	The sites you have added to the PNM Plus database appear in the **SITES** list box (see Section 4.4.1, *Adding a Site to the Database*).
3	In the **SITES** list box, click on the site you want to assign a contract.	The Site name appears in the **SITE** icon.
4	Double click on the **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears. *Figure 4-26*.
5	Select a contract from the **CONTRACT** drop down list.	
6	Click on **OK**.	The contract is assigned to the site. Returns the **NAVIGATION** screen with the **CONTRACT** icon still displaying *Unassigned*. *Figure 4-1*.
7	To display the Contract you selected in the **SITE DETAIL** screen, click on **CLEAR ALL** at the **NAVIGATION** screen, select the site from the **SITES** list box by double clicking it.	
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.4.8 ASSIGNING A SITE TO A ROUTE

Once you have established a site, you can assign the site to a route. By assigning sites that are close to each other to the same route, a technician who is assigned a route can service more sites. Once you have assigned sites to a route, that route cannot be deleted until the sites have been moved to another route or the route has been reassigned as an Unassigned Route.

You can assign a site to a route by following one of two procedures. Each procedure is discussed below.

4.4.8.1 Assigning a Route to a Site

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Click on the **SITE** icon.	The sites you have added to the PNM Plus database appear in the **SITES** list box (see Section 4.4.1, *Adding a Site to the Database*).
3	In the **SITES** list box, click on the site you want to assign a route.	The Site name appears in the **SITE** icon.
4	Double click on the **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears. *Figure 4-26*.
5	Select a route from the **ROUTE** drop down list.	
6	Click on **OK**.	The route is assigned to the site. Returns the **NAVIGATION** screen with the **ROUTE** icon still displaying *Unassigned*. *Figure 4-1*.
7	To display the route you selected in the **SITE DETAIL** screen, click on **CLEAR ALL** at the **NAVIGATION** screen, and click on the site from the **SITES** list box.	
8	To exit the **NAVIGATION** screen, click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

In addition to selecting a route for a site from the **SITE DETAIL** screen, you also can select a site for an established route. At your option, you can also arrange the sites in any order you want within the route. This way, the sites can appear in the sequence in which they will be visited by the technician when they make their rounds.

4.4.8.2 Assigning a Site to a Route

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double click on the **ROUTE** icon or click on it once and then click on **DETAIL**.	The **ROUTE DETAIL** screen appears. *Figure 4-27*.
3	Select a route by clicking on the box to the left of the route.	
4	Click on **ASSIGN SITES**.	The **ASSIGN SITES TO ROUTE** screen appears. *Figure 4-31*.

Figure 4-31

Only sites that are not already assigned to a route can be used. These sites appear in the **UNASSIGNED SITES** list box.

5	In the **UNASSIGNED SITES** list box, select the site you want to add.	
6	Click on **ADD**.	The site is moved to the **SITES ASSIGNED** list box. You can repeat this procedure to add more than one site.
7	Click on **OK**.	Returns the **ROUTE DETAIL** screen.
8	Click on **CLOSE**.	The site is assigned to the route. Returns the **NAVIGATION** screen. *Figure 4-1*.
9	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.4.8.3 Setting Sites in Order on a Route

To move a site from the **UNASSIGNED SITES** list box to the **SITES ASSIGNED** list box in the **ASSIGN SITES TO ROUTE** screen in any position other than the end of the list, do the following.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double click on the **ROUTE** icon or click on it once and then click on **DETAIL**.	The **ROUTE DETAIL** screen appears. *Figure 4-27*.
3	Select a route by clicking on the box to the left of the route.	
4	Click on **ASSIGN SITES**.	The **ASSIGN SITES TO ROUTE** screen appears. *Figure 4-31*.
5	In the **SITES ASSIGNED** list box, click on the site below where you want to insert the new site.	For example, to add site *D* into a **SITES ASSIGNED** list box containing *A, B, C, E*, and *F,* select *E* as the position where the new site should go.
6	Click on **INSERT BEFORE**.	
7	Double-click on the site in the **UNASSIGNED SITES** list box that you want to assign.	The site is assigned to the route and inserted before the site you clicked on in the **SITES ASSIGNED** list box.
8	Click on **OK**.	Returns the **ROUTE DETAIL** screen. *Figure 4-27*.
9	Click on **CLOSE**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.4.9 ASSIGNING A TECHNICIAN TO A ROUTE

Once you have established a route and assigned sites to the route, you can assign a technician to the route.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double click on the **ROUTE** icon or click on it once and then click on **DETAIL**.	The **ROUTE DETAIL** screen appears. *Figure 4-27*.
3	Select the route you want to assign by clicking on the box to the left of the route.	
4	Tab over to the **TECHNICIAN** column.	The following drop down list appears. *Figure 4-32*. *Figure 4-32*
5	Select one of the available technicians from the drop down list.	The technician appears in the **TECHNICIAN** column.
6	Click on **CLOSE**.	The technician is assigned to the route. Returns the **NAVIGATION** screen. *Figure 4-1*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.
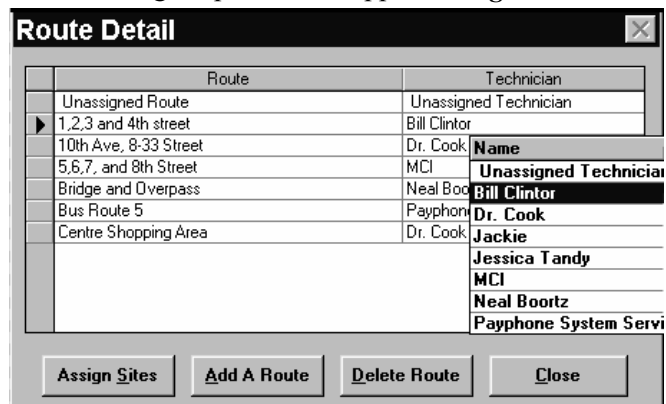
4.4.10 ASSIGNING A CONTRACT TO A CUSTOMER

You assign a contract to a customer at the **CONTRACT DETAIL** screen. See Section 9.4, *Administering Customer & Contract Information*, for more information.

4.5 Maintaining your Payphone Network

Once you have created your payphone network by adding one or more phones, sites, routes, technicians, contracts, and customers to your database and then making the appropriate assignments, you might find it necessary to make changes to the network. For example, you might need to remove a phone from a site or delete a route that a technician no longer uses. Following are instructions you can use to perform the maintenance procedures you might need.

4.5.1 EDITING PHONE INFORMATION

After you enter a phone into the PNM Plus database, you might want to change some information about the phone, such as its registers and options or its location.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	At the **PHONES** list box, click on the phone containing information you want to change.	The name of the phone appears in the **PHONE** icon.
3	Double click on the **PHONE** icon or click on it once and then click on **DETAIL**.	The **PHONE DETAIL** screen appears for the phone you selected. *Figure 4-7*.
4	Select the fields you want to change and enter the new information.	
5	When you have completed editing the fields, click on **OK**.	If you have made changes that affect the configuration of the phone, the **STOP** - download warning screen appears. *Figure 8-1*. See Chapter 8, *Managing Payphone Configuration*, for download instructions.
		If the changes do not affect the configuration of the phone, the **NAVIGATION** screen returns. *Figure 4-1*

4.5.2 REMOVING A PHONE FROM THE PNM PLUS DATABASE

After you enter a phone into the PNM Plus database, you might have to take the phone out of service. Possible reasons include the phone does not work or is constantly vandalized.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	At the **PHONES** list box, double click on the phone you want to remove from the database or click on the phone and then click on **DETAIL**.	The **PHONE DETAIL** screen appears for the phone you selected. *Figure 4-7*.

3	Click on **DELETE**.	A prompt asks you to verify the deletion.
4	Click on **YES** to verify the deletion.	A prompt informs you that the deletion was successful.
5	Click on **OK** at the prompt.	Returns the **NAVIGATION** screen. *Figure 4-1*.
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.3 REMOVING A PHONE FROM A SITE

If you have assigned a phone to a site, you can remove the phone from the site and place it at another site.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Click on the **SITE** icon.	The sites you have added to the PNM Plus database appear in the **SITES** list box (see section Section 4.4.1, *Adding a Site to the Database*).
3	At the **SITES** list box, click on the site containing the phone you want to remove.	The name of the site appears in the **SITE** icon.
4	Double click on the **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears for the site you selected. *Figure 4-26*.
5	Click on **ASSIGN PHONES**.	The **ASSIGN PHONES TO SITE** screen appears. *Figure 4-30*.
6	At the **PHONES AT SITE** list box, click on the phone you want to remove from the site.	
7	Click on **REMOVE**.	The phone moves to the **UNASSIGNED PHONES** list box and can now be assigned to another site. See Section 4.4.6, *Assigning Phones to a Site*.
8	Click on **OK**	The phone is removed from the site. Returns the **SITE DETAIL** screen. *Figure 4-26*.
9	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.4 EDITING INFORMATION ABOUT A SITE

After you enter a site into the PNM Plus database, you might want to change some of the information about the site, such as its contact person or route.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Click on the **SITE** icon.	The sites you have added to the PNM Plus database appear in the **SITES** list box (see Section 4.4.1, *Adding a Site to the Database*).
3	At the **SITES** list box, click on the site containing the information you want to change.	The name of the site appears in the **SITE** icon.
4	Double click on the **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears for the site you selected. *Figure 4-26.*
5	Select the fields you want to change and enter the new information.	
6	When you have completed editing the fields, click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.5 REMOVING A SITE FROM THE PNM PLUS DATABASE

After you enter a site into the PNM Plus database, you might have to remove it. For example, your contract with the site might not be renewed so you have to remove all your phones at the site.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Click on the **SITE** icon.	The sites you have added to the PNM Plus database appear in the **SITES** list box (see Section 4.4.1, *Adding a Site to the Database*).
3	At the **SITES** list box, click on the site you want to remove.	The name of the site appears in the **SITE** icon.
4	Double click on the **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears for the site you selected. *Figure 4-26*.
5	Click on **DELETE**.	A prompt asks you to verify the deletion.
6	Click on **YES** to verify the deletion.	A prompt informs you that the deletion was successful.

7	Click on **OK** at the prompt.	Returns the **NAVIGATION** screen. *Figure 4-1*.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.6 EDITING A ROUTE

After you enter a route into the PNM Plus database, you can change the name of the route.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double click on the **ROUTE** icon or click on it once and then click on **DETAIL**.	The **ROUTE DETAIL** screen appears. *Figure 4-27*.
3	Select the route you want to edit by clicking on the box to the left of the route.	
4	Double click on the name of the route in the **ROUTE** column.	
5	Edit the name of the route.	
6	Click on **CLOSE**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.7 REMOVING A ROUTE FROM THE PNM PLUS DATABASE

After you enter a route into the PNM Plus database, you might have to remove it. For example, you might decide to combine routes by moving the sites in one route to another route.

Before you can remove a route, however, you need to reassign the sites contained on that route. For instructions on removing a site from a route, see Section 4.5.8, *Removing a Site from a Route*. For instructions on assigning a site to a route, see Section 4.4.8, *Assigning a Site to a Route*.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double click on the **ROUTE** icon or click on it once and then click on **DETAIL**.	The **ROUTE DETAIL** screen appears. *Figure 4-27*.
3	Select the route you want to remove from the database by clicking on the box to the left of the route.	

4	Click on **DELETE ROUTE**.	If you have not removed all sites from the route, an error message informs you that you need to reassign the sites before you can delete the route. Click on **OK** and reassign the sites in the route.
5	Click on **CLOSE**.	The route is removed from the database. Returns the **NAVIGATION** screen. *Figure 4-1*.
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.8 REMOVING A SITE FROM A ROUTE

If you have assigned a site to a route, you can remove the site from the route and place it at another route.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Double click on the **ROUTE** icon or click on it once and then click on **DETAIL**.	The **ROUTE DETAIL** screen appears. *Figure 4-27*.
3	Select the route containing the site you want to remove by clicking on the box to the left of the route.	
4	Click on **ASSIGN SITES**.	The **ASSIGN SITES TO ROUTE** screen appears. *Figure 4-31*.
5	At the **SITES ASSIGNED** list box, click on the site you want to remove from the route.	
6	Click on **REMOVE**.	The site moves to the **UNASSIGNED SITES** list box and can now be assigned to another route. See Section 4.4.8, *Assigning a Site to a Route*.
7	Click on **OK**.	The site is removed from the route. Returns the **ROUTE DETAIL** screen.
8	Click on **CLOSE**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
9	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.9 EDITING INFORMATION ABOUT A TECHNICIAN

After you enter a technician into the PNM Plus database, you might want to change some of the information about the technician, such as his address or phone number.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Click on the **TECHNICIAN** icon.	The technicians you have added to the PNM Plus database appear in the **TECHNICIANS** list box (see Section 4.4.4, *Adding a Technician to the Database*).
3	At the **TECHNICIANS** list box, click on the technician whose information you want to change.	The name of the technician appears in the **TECHNICIAN** icon.
4	Double click on the **TECHNICIAN** icon or click on it once and then click on **DETAIL**.	The **TECHNICIAN DETAIL** screen appears for the phone you selected. *Figure 4-29*.
5	Select the fields you want to change and enter the new information.	
6	When you have completed editing the fields, click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

4.5.10 REMOVING A TECHNICIAN FROM THE PNM PLUS DATABASE

After you enter a technician into the PNM Plus database, you might have to remove them. For example, the technician might have moved and is no longer available to service your routes. Before you can remove a technician, however, you need to reassign the routes assigned to that technician. For instructions on assigning a technician to a route, see Section 4.4.9, *Assigning a Technician to a Route*.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. ***Figure 4-1***.
2	Click on the **TECHNICIAN** icon.	The technicians you have added to the PNM Plus database appear in the **TECHNICIANS** list box (see Section 4.4.4, *Adding a Technician to the Database*).
3	In the **TECHNICIANS** list box, click on the technician you want to remove from the database.	The name of the technician appears in the **TECHNICIAN** icon.
4	Double click on the **TECHNICIAN** icon or click on it once and then click on **DETAIL**.	The **TECHNICIAN DETAIL** screen appears for the phone you selected.
5	Click on **DELETE**.	If you have not reassigned all of the technician's routes, an error message informs you that you need to reassign the routes before you can delete the technician. Click on **OK** and reassign the routes.
6	Click on **OK**.	The technician is removed from the database. Returns the **NAVIGATION** screen. ***Figure 4-1***.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1***.

4.5.11 PROCESSING NOTES FOR A SITE

You can access an optional facility for storing and viewing up to 1024 characters of a site's free-form notes through the **SITE DETAIL** screen. You can view existing notes, add new notes, change the content of existing notes, and delete notes using this facility.

The **SITE DETAIL** screen contains one of these two icons: **Notes** or **Notes**.

The first icon indicates there are presently no notes on file for this site. The second icon indicates that notes are in the database and are available for viewing.

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	Click on the **SITE** icon.	The sites you have added to the PNM Plus database appear in the **SITES** list box (see Section 4.4.1, *Adding a Site to the Database*).
3	At the **SITES** list box, click on the site containing notes you want to view.	The name of the site appears in the **SITE** icon.
4	Double click on the **SITE** icon or click on it once and then click on **DETAIL**.	The **SITE DETAIL** screen appears for the site you selected. *Figure 4-26*.
5	To add notes, click on the **Notes** icon.	The **NOTES** screen appears. *Figure 4-33*. *Figure 4-33*
6	Add new notes data.	
7	Click on **OK**.	Returns the **SITE DETAIL** screen. *Figure 4-26*.
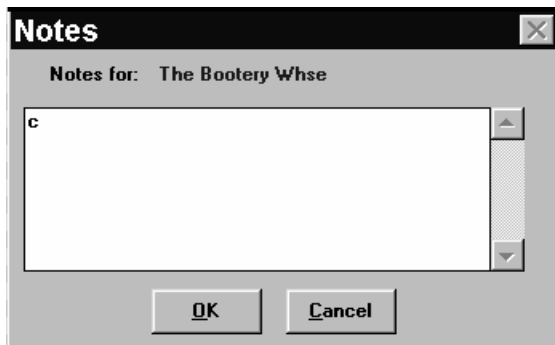
8	To view notes, click on the **Notes** icon.	The **NOTES** screen appears. *Figure 4-34*.
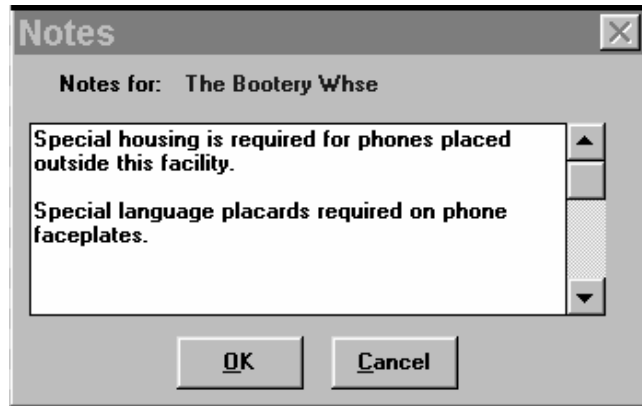
Figure 4-34

9	Read the notes in the screen.	
10	Click on **OK** or **CANCEL.**	Returns the **SITE DETAIL** screen. *Figure 4-26*.
11	To delete notes, click on the **Notes** icon.	The **NOTES** screen appears. *Figure 4-34*.
12	Erase all notes in the **NOTES** screen (including all blanks and spaces).	
13	Click on **OK.**	Returns the **SITE DETAIL** screen. *Figure 4-26*. The **NOTES** icon should change to show that there are no notes for this phone.
14	Click on **OK**.	Returns the **NAVIGATION** screen. *Figure 4-1*.
15	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

5. COMMUNICATING WITH THE PAYPHONE

One of the primary advantages of owning and operating the Elcotel intelligent payphone is the ability to remotely perform the following tasks:

- Detect alarms and conditions that place the phone out of service.
- Reconfigure the way the payphone operates.
- Set new rates for various call types.
- Diagnose problems on the phone.

Elcotel's intelligent payphones can be controlled in three ways:

- By directly pressing keys on the phone's keypad to set phone options and features.
- By calling the phone and sending commands to the remote phone from the local keypad.
- By calling the phone from PNM Plus and sending electronic commands and data to the payphone.

The latter method is the most powerful and is the means provided by PNM Plus to perform the following kinds of tasks:

- Send new rates to the payphone.
- Send new priority parsing information.
- Send new Speed Dial patterns and prices to the payphone.
- Send new Voice Brand files (Series 5/5501 phones only).
- Send an additional Language file to a phone (KX-5502 phones running KX 1.3 firmware only).
- Send new Repertory dialer and Credit/Debit Card files (KX-5502 phones only).
- Send new Scrolling Messages files (KX-5502 phones only).
- Update the phone's program version.
- Update the payphone's Register and Options values.
- Collect alarm and status information.
- Collect SMDR information.

There are two ways you can use PNM Plus to perform these tasks:

- You can assign the phone to a poll list and then have the Poll Manager call the phone according to the schedule you set up for the poll list.
- You can call the phone at any time by directly dialing it.

Section 5.1 and *Section 5.2* show you how to use poll lists and the Poll Manager to contact the phone. *Section 5.3* shows you how to dial the phone directly.

5.1 Poll List Maintenance

Poll Lists are a powerful tool provided by PNM Plus to enable you to manage one or more phones in an automated fashion. Poll Lists enable you to set up a series of commands that the PNM Plus Poll Manager executes on a selected list of payphones. Poll Lists are established and managed in the Operator Console, saved in the database, and executed by the Poll Manager.

A Poll List consists of the following components:

- The Poll List name.
- The type of Poll List:
  - One Time.
  - Recurring.
- A list of payphones to be contacted.
- A list of commands to be executed on the payphones.
- Schedule of days or dates and the time the list should be started.

The Poll List Maintenance function enables you to set these components.

A Poll List can be used on a large number of phones to perform similar tasks, such as:

- Downloading new Rate files.
- Collecting alarm and status information.
- Downloading new program files.
- Updating the Registers and Options information in the phones.

Since the PNM Plus Poll Manager can be configured to use several modem lines to concurrently contact several payphones, it can perform these tasks much faster and easier than you can perform them manually.

Since the tasks to be performed might need to be done only once (e.g., downloading rate files) or routinely (e.g., collecting alarm status), Poll Lists can be of two types: one-time or recurring. The Poll Manager executes the commands on a One-Time Poll List once for each phone on the list.

5.1.1 CREATING A POLL LIST FROM THE POLL LIST MAINTENANCE SCREEN

Poll Lists can be created in the following ways:

- From the **POLL LIST MAINTENANCE** screen.
- From the **GROUP CHANGE** screen.
  See Section 8.9.3, *Creating a Poll List at the Global Phone Changes Screen*.
- By selecting Option 2 from the **STOP**-download warning screen after you change payphone parameters. See Chapter 8, *Managing Payphone Configuration*.

This section describes how to create poll lists from the **POLL LIST MAINTENANCE** screen.

From the **OPERATOR CONSOLE** screen:

1	Click on the **POLL LIST** icon.	The **POLL LIST MAINTENANCE** screen appears with the available poll lists displayed in the **POLL LISTS** list box. *Figure 5-1*.
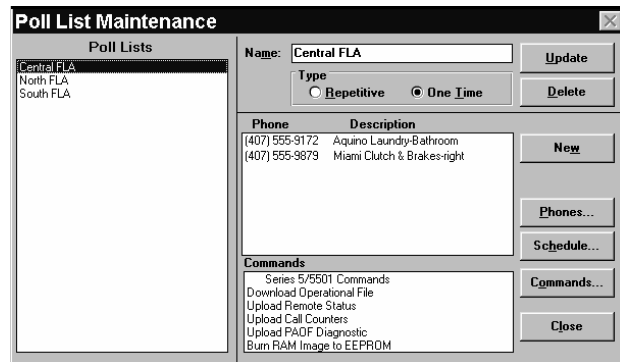
Figure 5-1

2	Click on **NEW.**	The **ENTER NEW POLL LIST INFORMATION** screen appears. *Figure 5-2*.

Figure 5-2

3	Enter the Poll List name in the **ENTER POLL LIST NAME** field.	
4	Set the Poll List type by clicking on the **REPETITIVE** or **ONE TIME** button.	
5	Click on **OK**.	The **POLL SCHEDULE** screen appears. *Figure 5-3*.
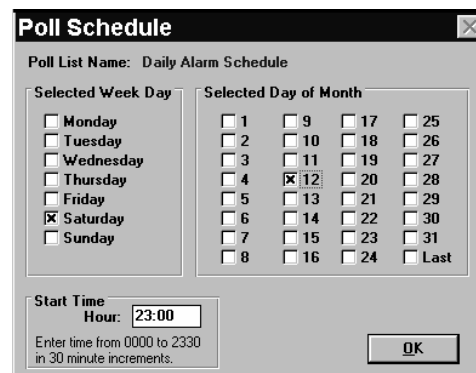
Figure 5-3

6	Select the days the schedule is to run and enter the start time for the poll list.	For further information on Poll List schedules, see Section 5.1.3.4, *Updating a Poll Schedule*.
7	Click on **OK**.	The **POLL LIST COMMANDS** screen appears. *Figure 5-4*.
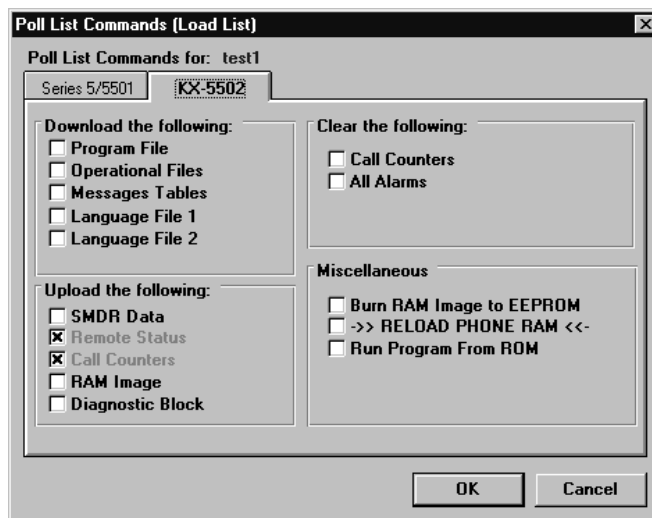
Figure 5-4

8	Select the check boxes of the commands to be performed.	For further information on Poll List commands, see Section 5.1.3.2, *Updating the Poll List's Commands*.
9	Click on **OK**.	The **ASSIGN PHONES TO POLL LIST** screen appears. *Figure 5-5*.
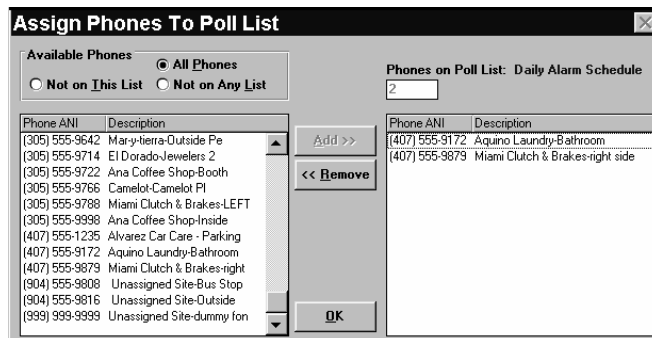
Figure 5-5

10	Assign phones to the Poll List and then click on **OK**.	The poll list is added to the database. Returns the **POLL LIST MAINTENANCE** screen. *Figure 5-1*.
		For further information on assigning phones to a Poll List, see Section 5.1.3.3, *Updating Phones Assigned to a Poll List*.
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

5.1.2 SELECTING A POLL LIST

After you create a poll list, the poll list name appears in the **POLL LIST MAINTENANCE** screen **POLL LISTS** list box. You can then perform the following steps to select the poll list:

From the **OPERATOR CONSOLE** screen:

1	Click on the **POLL LIST** icon.	The **POLL LIST MAINTENANCE** screen appears with the available poll lists displayed in the **POLL LISTS** list box. ***Figure 5-1***.
2	Select the desired list in the **POLL LISTS** list box.	
3	Click on the list name.	Information about the selected poll list appears. ***Figure 5-6***.
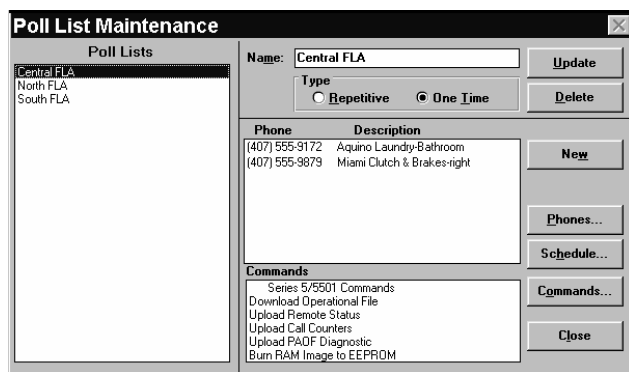
Figure 5-6

		This screen displays the Poll List name, type, phones on the list, and commands to be performed. In addition, buttons permitting actions on the list elements are enabled.
4	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1.***

5.1.3 UPDATING THE POLL LIST

You can use the **POLL LIST MAINTENANCE** screen to update the following:

- The name and type of the poll list you want to use.
- The commands that tell the poll list what to do.
- The phones assigned to the poll list.
- The schedule that tells the poll list when to run.

Each of these is discussed in the following sections.

5.1.3.1 Updating the Poll List Name and Type

From the **OPERATOR CONSOLE** screen:

1	Click on the **POLL LIST** icon.	The **POLL LIST MAINTENANCE** screen appears with the available poll lists displayed in the **POLL LISTS** list box. ***Figure 5-1***.
2	Click on the desired list in the **POLL LISTS** list box.	Information about the poll list appears. ***Figure 5-6***.
3	Enter the change to the name in the edit box, as in the following example: Na**m**e: Daily Alarm Collection	
4	Click on the option button for the desired type, as in the following example: Type ◉ **R**epetitive ○ One **T**ime	
5	Click on **UPDATE**.	Your changes are added to the poll list.
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1.***

5.1.3.2 Updating the Poll List's Commands

From the **OPERATOR CONSOLE** screen:

1	Click on the **POLL LIST** icon.	The **POLL LIST MAINTENANCE** screen appears with the available poll lists displayed in the **POLL LISTS** list box. ***Figure 5-1.***
2	Click on the desired list in the **POLL LISTS** list box.	Information about the poll list appears. ***Figure 5-6***.
3	Click on **COMMANDS**.	The **POLL LIST COMMANDS** screen appears. ***Figure 5-4***. The **POLL LIST COMMANDS** screen displays the commands associated with the selected Poll List. The phone commands are displayed on tabs for the different types of phones managed by PNM Plus. All Active commands are checked.
4	Select the tab for the corresponding phone model type to view the command list.	
5	To activate or deactivate a command, check (or uncheck) the appropriate command option's check box.	

| 6 | Click on **OK** | The poll list commands are updated. Returns the **POLL LIST MAINTENANCE** screen. *Figure 5-6*. |
| 7 | Click on **CLOSE**. | Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.* |

5.1.3.3 Updating Phones Assigned to a Poll List

From the **OPERATOR CONSOLE** screen:

1	Click on the **POLL LIST** icon.	The **POLL LIST MAINTENANCE** screen appears with the available poll lists displayed in the **POLL LISTS** list box. *Figure 5-1*.
2	Click on the desired list in the **POLL LISTS** list box.	Information about the poll list appears. *Figure 5-6*.
3	Click on **PHONES**.	The **ASSIGN PHONES TO POLL LIST** screen appears. *Figure 5-5*.
		The **ASSIGN PHONES TO POLL LIST** screen displays phones assigned to the Poll List and phones that can be added to the list. The total number of phones on the Poll List is also displayed.
4	You can do the following at this screen: • To remove a phone from the Poll List, select the phone in the **PHONES ON POLL LIST** box and then click on **REMOVE** *or* double-click on the selected phone. • To add a phone to the Poll List, select the phone in the **AVAILABLE PHONES** list box and then click on **ADD** *or* double-click on the selected phone. • To set the list of available phones to all phones in the database, click on **ALL PHONES**. • To set the list of available phones to phones not already on this list, click on **NOT ON THIS LIST**. • To set the list of available phones to phones not on any list, click on **NOT ON ANY LIST**.	

5	When satisfied with the list of phones in the **PHONES ON POLL LIST** box, click on **OK**.	Returns the **POLL LIST MAINTENANCE** screen. *Figure 5-6*.
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

5.1.3.4 Updating a Poll Schedule

From the **OPERATOR CONSOLE** screen:

1	Click on the **POLL LIST** icon.	The **POLL LIST MAINTENANCE** screen appears with the available poll lists displayed in the **POLL LISTS** list box. *Figure 5-1*.
2	Click on the desired list in the **POLL LISTS** list box.	Information about the poll list appears. *Figure 5-6*.
3	Click on **SCHEDULE**.	The **POLL SCHEDULE** screen appears. *Figure 5-3*.
		All Active days are checked and all Inactive days are empty.
4	To activate or deactivate any of the days or dates, click on the box located to the left of the selection.	If you select a day of the week and a day of the month for this poll list, the polling takes place when either one of these conditions are met (i.e., on Saturday *or* on the 12th of the month).
5	To modify the start time, click on the **HOUR** box and enter the new start time. (Enter the time based on a 24-hour clock.)	Poll Lists can only start on the hour or half hour.
6	Click on **OK**.	The poll schedule is saved for this poll list. Returns the **POLL LIST MAINTENANCE** screen. *Figure 5-6*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

5.1.4 DELETING A POLL LIST

If you have a poll list that you no longer use, you can delete it from your system.

From the **OPERATOR CONSOLE** screen:

1	Click on the **POLL LIST** icon.	The **POLL LIST MAINTENANCE** screen appears with the available poll lists displayed in the **POLL LISTS** list box. ***Figure 5-1***.
2	At the **POLL LISTS** list box, click on the name of the Poll List to be deleted.	Information about the poll list appears. ***Figure 5-6***.
3	Click on **DELETE**.	A prompt asks you to verify the deletion.
4	Click on **OK** at the prompt.	The poll list is deleted from your database. Returns the **POLL LIST MAINTENANCE** screen. ***Figure 5-6***.
5	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1.***

5.2 Controlling Poll Lists

The first step in controlling a poll list is defining the poll list. See *Section 5.1.1, Creating a Poll List from the Poll List Maintenance Screen,* for a description of how to create a Poll List.

From the **POLL MANAGER** screen, you can control any of the Poll Lists defined in PNM Plus. This section describes how to start, stop, and modify Poll Lists using the Poll Manager program.

5.2.1 STARTING A POLL LIST

1	Click on **START**, move the mouse to **PROGRAMS**, to **PNM PLUS**, and click on **POLL MANAGER**.	The **POLL MANAGER** screen appears. *Figure 3-5*. See Section 3.2, *The Poll Manager*, for more information on the Poll Manager.
2	From the **POLL LIST INFORMATION** box, select the Poll List you want to start.	To select the Poll List, you can click on it with your mouse or you can press the <Tab> key to move to the poll list you want.
3	From the **POLL LISTS** menu, select **START POLLING THIS LIST**.	The selected poll list status changes to *Start*, indicating the status of the polling. The status of the poll list changes to *Active*. To check the progress of the polling of your phones, see Section 5.2.2, *Determining Polling Progress*.

5.2.2 DETERMINING POLLING PROGRESS

When you start a poll list, Poll Manager searches through the PNM Plus database to find the list of phones assigned to this polling. In addition, if the communication port is idle, the Poll Manager initializes an active modem port that has been defined for outbound or both inbound and outbound calling.

The Poll Manager then begins to dial the first phone on the Poll List. If your poll list contains a number of phones, you can review the status of the Poll List to verify how many phones were contacted and the percentage completion of the Polling.

To review the status of the Poll List, select the **POLL MANAGER** icon from the PNM Plus Program Manager Group and then select **SHOW LIST PROGRESS** from the **POLL MANAGER** screen **POLL LISTS** menu.

The **POLL LIST PROGRESS** screen appears (see Figure 5-7).
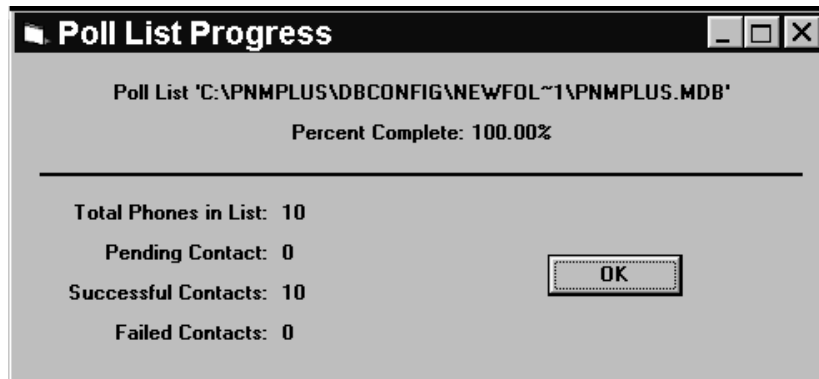
Figure 5-7

This screen displays the following:

- The number of phones assigned to the Poll List.

- The number of phones on the list pending contact.

- The number of successful contacts with the phone.

- The number of failed contacts in the list.

The following paragraphs describe the steps of the polling process.

First, the Poll Manager reviews the PNM Plus database to retrieve the phone number of the phone to be dialed, the schedule and commands associated with this poll list, and the commands associated with the first phone on the poll list.

Second, the Poll Manager reviews the Port Configuration information to determine which ports are available to use. Once a port is found, it is initialized and the string of numbers to be dialed for the first phone assigned to the poll list is sent to the modem. The length of the string of numbers dialed depends on the dial pattern defined for that payphone's site.

The dial prefix also can be defined in the PNM Plus **SITE DETAIL** screen. This information can be modified through PNM Plus (see Section 4.4.1, *Adding a Site to the Database*).

The Poll Manager displays the progress of the commands being sent through the modem to the remote payphone.

The following commands can display under the **POLL MANAGER** screen **COMMAND PROGRESS** column.

5.2.2.1 Querying the Database

The **QUERY THE DATABASE** command determines the length of the digits to be dialed as well as the phone logon information (i.e., Phone ID and password).

5.2.2.2 Waiting for Connect

The **WAITING FOR CONNECT** command represents the modem connection status. Once the connection is established with the remote phone, the status display changes to *Running Commands*.

5.2.2.3 Running Commands

While running commands, the Poll Manager performs the logon with the remote phone using the Phone ID and the password. If the logon to the phone fails, Poll Manager saves a *no contact* alarm in the database. You can review the alarm information at the end of the polling session to determine what actions to take. See Section 6.1, *Determining the Phone's Status*, and Section 6.5, *Managing Payphone Problems*, for a description of alarm management.

Once logon is successful, the Poll Manager starts to upload alarm information from the phone. The PNM Plus database is also updated to reflect all alarm information gathered by the Poll Manager. Once the alarms are uploaded, the call counters are also uploaded. The call counter information and the coins in the cash box are written to the PNM Plus database.

After all upload commands are completed, the download commands specified for the poll list are executed. For instance, if the Operational Files download command is active, all files and tables specified are downloaded. These files and tables are the Rate File, Priority Parsing File, Speed Dial table, Rep/ Card Files, and Registers and Options. You also have the option of downloading the Program File and Voice Brand File to Series 5/5501 phones, and Language Files, Scrolling Message File, and Program File to KX-5502 phones.

In addition to download commands, upload commands, clear alarm commands, and any miscellaneous commands are also performed. The alarm information for the phone is collected and saved in the PNM Plus database.

If at any time the operational file download fails, the Poll Manager continues to execute the download commands and, upon disconnect, will update the PNM Plus database with the alarm information and the file download information.

5.2.2.4 Updating the Database

The Updating the Database command logs the results of each contact or attempted contact with a payphone.

To review the dates that the operational files were last downloaded to the payphone, you can access the **PHONE DETAIL** screen in PNM Plus and click on **DATES** to display the **OPERATIONAL FILE DATES FOR** screen (see Section 4.3.16, *Viewing the Status of Payphone Operational Files*).

The PNM Plus database is updated with the contact history information for each phone polled and with the alarm information. The following table describes the updates to the database and how to view the polling output information.

Database Events	What information is stored	How to view this information.
Upload Alarms	All alarms reported by the phone during the polling	Click on the **INFORMATION** icon on the PNM Plus toolbar or on option **1** (Phone Status) in the **SERVICE MANAGEMENT MENU** of PNM Plus (see Section 6.1, *Determining the Phone's Status*).
Download Operational Files	Rate Files, Priority Parsing, Speed Dial, Program Files, Voice Brand Files, Language Files, Scrolling Message Files, Rep/Card Files and Registers and Options	At the **PHONE DETAIL** screen, click on **DATES** to review the date these were last downloaded (see Section 4.3.16, *Viewing the Status of Payphone Operational Files*).
Polling Status History	Status of the modem connection with the remote phone, login success, failures, call counters, and SMDR data	Click on the **VIEW PHONE CONTACT HISTORY** icon on the PNM Plus toolbar, or click on **HISTORY** at the PNM Plus **PHONE MANAGEMENT** screen (see Section 6.3, *Viewing Contact History*).

5.2.3 MODIFYING THE POLL SCHEDULE

Once you have set up a poll schedule for a poll list, you can change the days and times you want the polling to occur. To modify the poll schedule from the Poll Manager, select the poll list you want to modify from the **POLL MANAGER** screen and then select **VIEW SCHEDULE OF LIST** from the **POLL MANAGER** screen **POLL LISTS** menu. See Section 5.1.3.4, *Updating a Poll Schedule*, for instructions on how to modify the poll schedule.

5.2.4 MODIFYING THE POLL LIST COMMANDS

In addition to modifying the days and times the polling occurs, you also can change the commands that the poll list executes. To modify the Poll List commands from the Poll Manager, select the poll list you want to modify from the **POLL MANAGER** screen and then select **VIEW COMMANDS ON LIST** from the **POLL MANAGER** screen **POLL LISTS** menu. See Section 5.1.3.2, *Updating the Poll List's Commands*, for instructions on how to modify the Poll List commands.

5.3 Dialing your Payphone

Instead of using a poll list to contact your phone, you can dial the phone directly at any time to execute commands or to upload alarms and call counters from the phone.

Note: *The Poll Manager and the Operator Console cannot share the same modem. If you have only one modem, Poll Manager must be shut down to call the phone in this manner.*

To dial a phone, click on the **DIAL A PAYPHONE** icon at the PNM Plus toolbar.

The **DIAL PAYPHONE** screen (see Figure 5-8) displays current communications status as well as phone alarm and counter information.
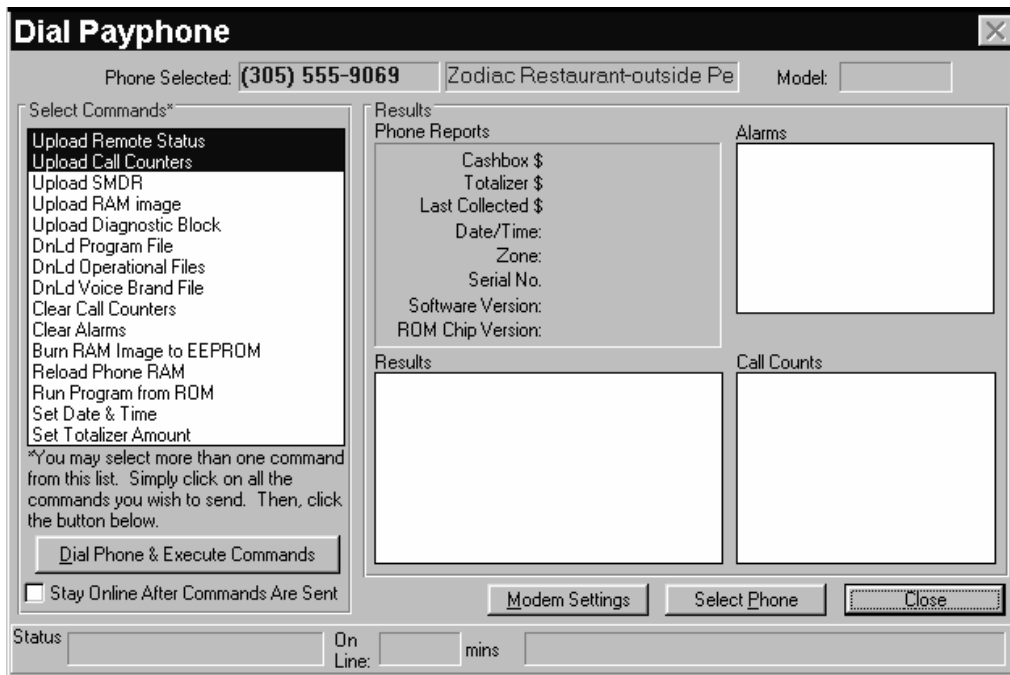
Figure 5-8

The buttons you can use on this screen, and their descriptions, are listed in the following table:

Buttons/Fields	Description
Select Commands	In this field, click on the commands you wish to execute.
Dial Phone & Execute Commands	Dials selected payphone. Initiates communications through specified comm port and modem executes selected commands.
Stay Online After Commands Are Sent	Click on this button to stay online and execute commands as required. You must click **END CALL** to disconnect (default is off for Efficiency Mode).
Modem Settings	Changes modem and communications port settings.
Select Phone	Selects a phone to be dialed.
/ Abort /	Ends active call (appears only while commands are executing).
/ Hang Up /	Ends active call (appears after executing commands for stay online).
/ Close /	Closes this screen (appears when no call is connected).

5.3.1 SELECTING A PHONE TO CALL

Click on **SELECT PHONE** at the **DIAL PAYPHONE** screen (Figure 5-8).

Note: *You can also choose a phone from the NAVIGATION screen or click on the FIND A PAYPHONE icon at the PNM Plus toolbar.*

The **FIND A PHONE** screen appears (see Figure 5-9).
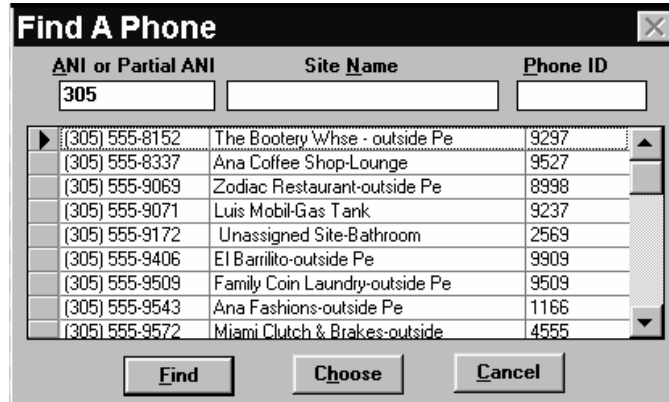
Figure 5-9

The search keys are ANI, Site Name, and Phone ID. You can enter one or all of these. If you enter all of them, the search criteria is ANI *and* Site *or* Phone ID. After you enter your search criteria, click on **FIND**.

The list of phones that match the criteria appears. Select a phone by clicking on the box to the left of the ANI and then click on **CHOOSE**.

Once you select a phone from the list, it appears in the upper left corner of the **DIAL PAYPHONE** screen (see Figure 5-10).
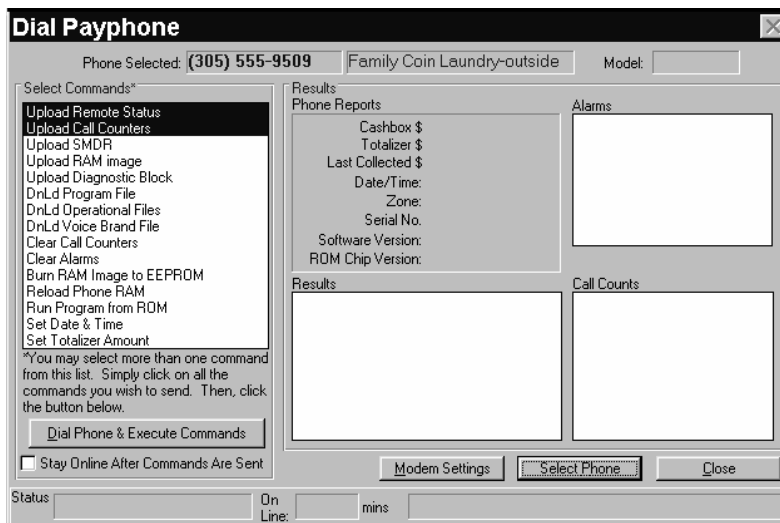
Figure 5-10

5.3.2 STARTING AND ENDING A CALL TO THE PHONE

An efficient method of contacting your payphones is the **STAY ONLINE AFTER COMMANDS ARE SENT** option. This button is activated at the **DIAL PAYPHONE** screen. This button is normally **OFF**. In the **OFF** mode, once PNM Plus has completed executing all the selected commands, the connection will be ended. This conserves the payphone battery and frees the payphone for your paying customers immediate use.

If you wish to change the default setting of the **STAY ONLINE AFTER COMMANDS ARE SENT** button, you may set the button's default to **ON** using the **SYSTEM CONFIGURATION PHONE DEFAULTS** screen. For more information about this screen, see Section 7.3.3, *Setting Phone Defaults*.

If there is any problem connecting with your payphone, such as the phone is in use, PNM Plus displays any error messages in the **RESULTS** window on the **DIAL PAYPHONE** screen (see Figure 5-11).
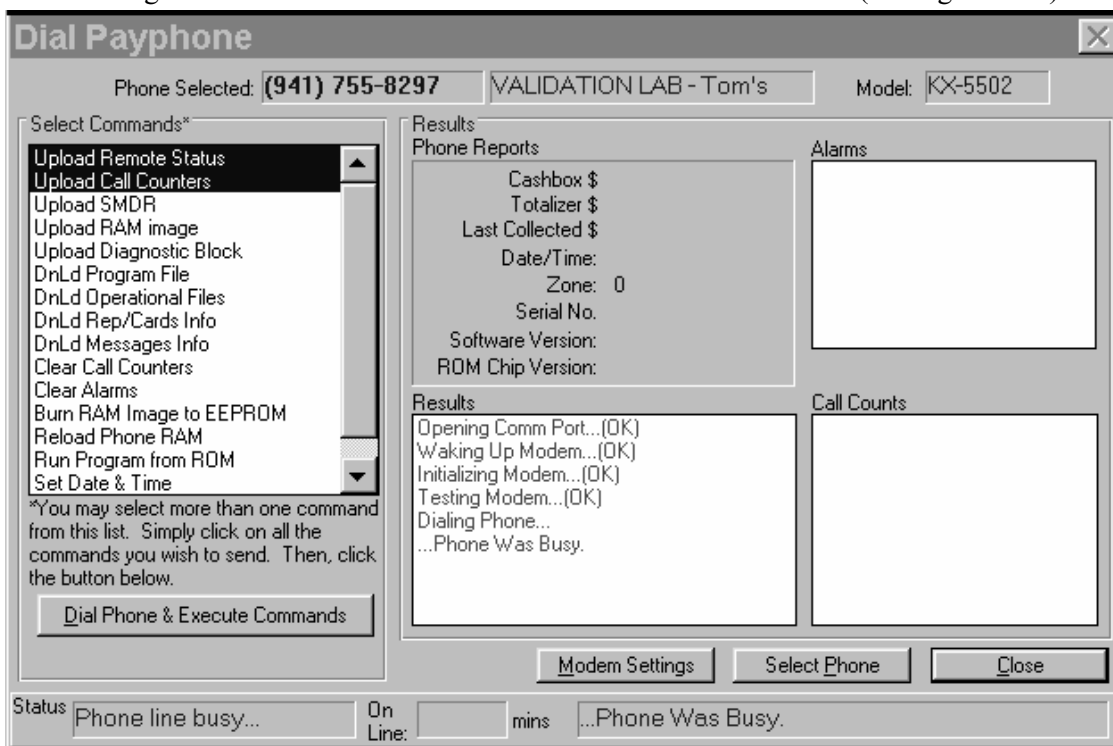
Figure 5-11

5.3.2.1 Efficiency Mode

In this mode, you must select your commands before you dial the payphone. If you select commands after clicking on **DIAL PHONE & EXECUTE COMMANDS**, you must dial the payphone again to execute the new commands.

To start a call, click on **DIAL PHONE & EXECUTE COMMANDS** at the **DIAL PAYPHONE** screen. This causes the program to initialize the modem and send out the prefix plus the specified number of digits to be dialed. The prefix and the dial digits are specified for the Site where this phone is located.

To modify or view these numbers, you can enter the **NAVIGATION** screen and choose the Site where the phone is located.

Once the modem connection is established with the remote phone, PNM Plus attempts to log on to the phone using the **PHONE ID** and **PASSWORD** specified for the selected phone. Once the logon is successful, the status display on the **DIAL PAYPHONE** screen shows *connected to phone....* The number of minutes and seconds the current call has been active appears beside the **ON-LINE** label (see Figure 5-12).

Dial Payphone

Phone Selected: **(941) 755-8297** VALIDATION LAB - Tom's Model: KX-5502

Select Commands*

Upload Remote Status
Upload Call Counters
Upload SMDR
Upload RAM image
Upload Diagnostic Block
DnLd Program File
DnLd Operational Files
DnLd Rep/Cards Info
DnLd Messages Info
Clear Call Counters
Clear Alarms
Burn RAM Image to EEPROM
Reload Phone RAM
Run Program from ROM
Set Date & Time

*You may select more than one command from this list. Simply click on all the commands you wish to send. Then, click the button below.

Dial Phone & Execute Commands

Results

Phone Reports

Cashbox $	0.00
Totalizer $	4.65
Last Collected $	0.00
Date/Time:	09/28/1998 11:57
Zone:	0
Serial No.	0000000000
Software Version:	KX 01.01.01
ROM Chip Version:	KX 01.01.01

Alarms

No Alarms reported

Results

...Payphone On-Line.
Initializing Connection...(OK)
Sending ID...(OK)
Sending Password Msg...(OK)
Sending Password...(OK)
Sending Phone Version...(OK)
Uploading Remote Status...(OK)
Uploading Call Counters...(OK)
Hanging Up Phone...(OK)

Call Counts

Local Coin	**3**
Other Coin	**3**
Zero Plus	**0**
Zero Minus	**0**
Dial Around	**0**
Other Calls	**0**
Total Calls	**6**

Modem Settings Select Phone Close

Status: Call ended. Now Offline... On Line: 0:00:03 mins

Figure 5-12

All specified commands are executed and the fields on the **DIAL PAYPHONE** screen are updated to show the phone data.

To end an active call, click on **ABORT**. This button appears in place of the **CLOSE** button when there is active communication with the phone.

5.3.2.2 Stay Online Mode

Click on the box to enter an X in the field next to **STAY ONLINE AFTER COMMANDS ARE SENT.** This operates the **DIAL PAYPHONE** screen in the stay online mode. PNM Plus automatically uploads remote status and call counters upon connection. It also executes any other commands you selected prior to dialing. After completing these commands, PNM Plus stays connected to your payphone until you break the connection by pressing **END CALL**. This allows you to execute additional commands without redialing your payphone.

Note: *As long as you remain connected to your payphone your phone is out of service and cannot generate business.*

To Execute a command

Step 1. Establish a connection with the desired payphone by clicking **DIAL PHONE & EXECUTE COMMANDS** (see Figure 5-13).
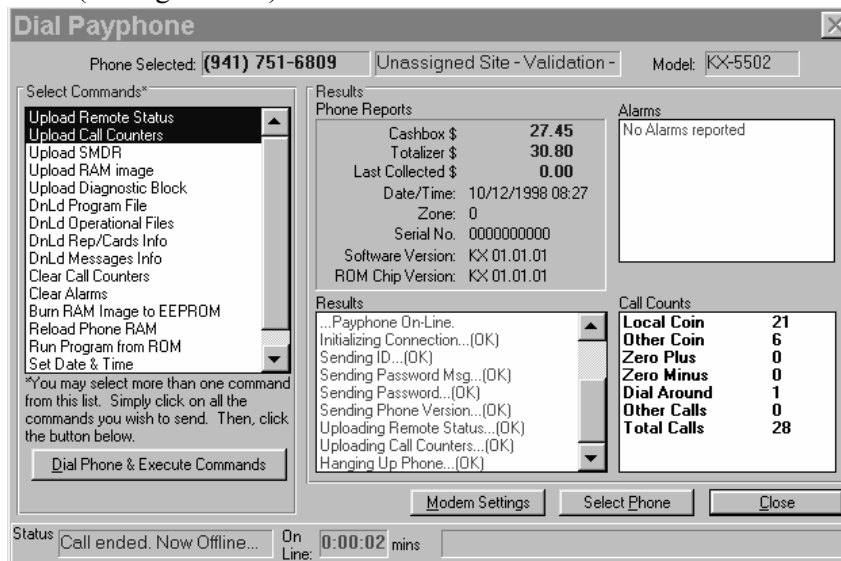
Figure 5-13

Step 2. Select the command to execute from the **DIAL PAYPHONE** screen **SELECT COMMAND** list window (see Figure 5-13). Click on **EXECUTE COMMAND**.

An information message appears after the command execution is complete, and the remote phone reports an **OK** message or an **ERROR** message in the **RESULTS** window.

Some of the commands, such as **SET DATE & TIME** and **SET TOTALIZER AMOUNT**, require additional information. When you select these commands, you must enter the information on the screen that is displayed.

For example, if you select the **SET DATE & TIME** command from the **DIAL PAYPHONE** screen, you need to enter the date, time, and day of the week in the appropriate fields in the **SET PHONE DATE/TIME** screen (see Figure 5-14).

Figure 5-14

After you have completed these fields, click **SEND** to send this information to the phone.

Note: *The TIME ZONE OFFSET field is entered in the SITE DETAIL screen. When specifying the time, PNM Plus adds the offset hours to the specified time to convert the Operator Console time to the phone's local time. For example, if the Time Zone offset is -2 hours, and the Operator Console time is 9:00, the phone's time is 7:00.*

Step 3. Repeat **STEP 2** as required to execute desired commands. Click on **HANG UP** to disconnect the call when complete.

5.3.3 EXECUTABLE COMMANDS

There are a number of commands that can be executed while on-line with the phone. The commands can be categorized into the following:

- Download commands.
- Upload commands.
- Clear commands.
- Miscellaneous commands.

The following table provides the list of available commands and their descriptions:

Commands	Description
Upload Remote Status	Retrieves the alarm and status information from the payphone and stores it in the database for viewing in the Service Management portion of PNM Plus (see Chapter 6, *Servicing and Maintaining the Payphone*) or for printing. Status information collected includes current cashbox amount, totalizer amount, alarm information, serial no., Program version, and ROM Chip version. **Note:** *This command is executed on every contact with the payphone and always shows selected.*
Upload Call Counters	Retrieves phone call counters, stores them in the database, and updates the screen display. Call counters can be viewed in the **CALL COUNT HISTORY** screen in the Contact History function of PNM Plus (see Section 6.3, *Viewing Contact History*). **Note:** *This command is executed on every contact with the payphone and always shows selected.*
Upload SMDR	Retrieves call records (SMDR) from the payphone and sends a copy of the SMDR data to the Operator Console. SMDR information can be viewed by clicking on the **SMDR** icon on the PNM Plus toolbar or by clicking on the **SMDR** button at the **CONTACT HISTORY** screen (see Section 5.4, *Collecting SMDR*).
Download Program File	Sends copy of assigned program file to the phone. When you select this command, PNM Plus automatically selects **DOWNLOAD OPERATIONAL FILES** and **BURN RAM IMAGE TO EEPROM**. Elcotel recommends that these commands be run together, but you may deselect the other commands if you want.

Commands	Description
Upload RAM Image	Retrieves a copy of the payphone's RAM image and sends it to the PNM Plus Operator Console. The RAM image contains the current values for the phone's registers and options, rate files, priority parsing files, and speed dial files. You can use this command when diagnosing phone problems or comparing phone settings. The RAM image can be reviewed using the **VIEW RAM IMAGE** option of the **SERVICE MANAGEMENT MENU** (see Section 6.9, *Viewing RAM Image*).
Upload Diagnostic Block	Retrieves the history of call processing steps from the payphone and saves the information in a file for later viewing. Useful for diagnosing the call macros or the phone's actions during call processing.
Download Operational Files	Sends current operational files to the phone. These include Rate files, Registers and Options, Speed Dial files, and Rep/Card files, and Priority Parsing files. When you select this command, PNM Plus automatically selects **BURN RAM IMAGE TO EEPROM**. Elcotel recommends that these commands be run together, but you may deselect the other command if you want.
Download Voice File	Sends copy of assigned voice file to the phone.
Download Language File	Sends copy of additional language file to phone.
Download Messages Information	Sends the scrolling advertising and repertory dialer instructional messages to the phone.
Clear Call Counters	Sets the phone call counters to *0*.
Clear Alarms	Resets the alarms in the phone.
Burn RAM Image to EEPROM	Copies RAM contents to ROM memory, which saves the phone's configuration in the EEPROM.
Reload phone RAM	Copies the phone's program file from ROM to RAM.
Run Program from ROM	Runs operational program downloaded to ROM.
Set Date & Time	Permits changing the phone's date and time. If there is a time zone difference, this difference is added to or subtracted from the time entered. For example, if the time zone is +3 hours and the time entered is *10:00*, the phone's time is set to *13:00* (or 1:00 p.m.).
Set Totalizer Amount	Sets the totalizer to the amount entered (on the phone's next **CONTACT COMMAND** list).

5.4 Collecting SMDR

Station Message Detail Records (SMDR) are call data detailing information such as the number dialed, date, time, duration, price, and credit card. SMDR are stored and uploaded for viewing and evaluation. They are also called Call Detail records.
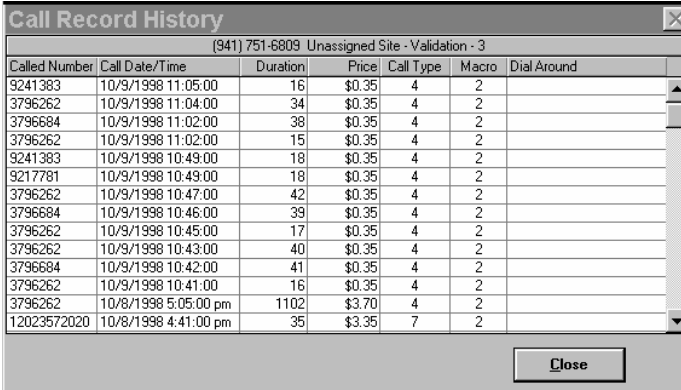
SMDR records can be collected from the payphone through the Poll Manager or through the on-line interface to the phone (**UPLOAD SMDR** command). SMDR is stored in a separate database within PNM Plus.

You can view the SMDR for a particular payphone at the **CALL RECORD HISTORY** screen.

Note: *Before you access the **CALL RECORD HISTORY** screen, you need to select a payphone at the **NAVIGATION** screen.*

You can access the **CALL RECORD HISTORY** screen (see Figure 5-15) by doing one of the following:

- Click on the PNM Plus toolbar **SMDR** icon.
- Click on the **CONTACT HISTORY** screen **SMDR** button (see Section 6.3, *Viewing Contact History*).

Called Number	Call Date/Time	Duration	Price	Call Type	Macro	Dial Around
9241383	10/9/1998 11:05:00	16	$0.35	4	2	
3796262	10/9/1998 11:04:00	34	$0.35	4	2	
3796684	10/9/1998 11:02:00	38	$0.35	4	2	
3796262	10/9/1998 11:02:00	15	$0.35	4	2	
9241383	10/9/1998 10:49:00	18	$0.35	4	2	
9217781	10/9/1998 10:49:00	18	$0.35	4	2	
3796262	10/9/1998 10:47:00	42	$0.35	4	2	
3796684	10/9/1998 10:46:00	39	$0.35	4	2	
3796262	10/9/1998 10:45:00	17	$0.35	4	2	
3796262	10/9/1998 10:43:00	40	$0.35	4	2	
3796684	10/9/1998 10:42:00	41	$0.35	4	2	
3796262	10/9/1998 10:41:00	16	$0.35	4	2	
3796262	10/8/1998 5:05:00 pm	1102	$3.70	4	2	
12023572020	10/8/1998 4:41:00 pm	35	$3.35	7	2	

Call Record History — (941) 751-6809 Unassigned Site - Validation - 3 — Close

Figure 5-15

The **CALL RECORD HISTORY** screen displays records in the database for the currently selected payphone. Each record displays the ANI, call date, call duration in seconds, call price, call type, call macro number used to process the call, the response, approval, and dial-around information.

To close the **CALL RECORD HISTORY** screen, click on **CLOSE**.

6. SERVICING AND MAINTAINING THE PAYPHONE

From time to time, your payphone might not work properly. As a result, you need to assign a technician to fix it or you need to provide a customer with a refund. The following sections show you how to determine what the problem is, how to assign a technician to fix the problem, and how to handle customer service calls.

6.1 Determining the Phone's Status

The PNM Plus Phone Status feature provides you with the ability to review problems and alarms that are reported by the phones and to maintain a historical log of these problems for your review. The contact history information is stored for all the problems and alarms reported for a specified period of time. PNM Plus also provides historical call count information and collected SMDR information for a selected phone.

From the **OPERATOR CONSOLE** screen:

1   Click on the **SERVICE MANAGEMENT** icon.

The **SERVICE MANAGEMENT MENU** appears. *Figure 6-1*.

Figure 6-1

2   Click on **1** (Phone Status).

The **PHONE MANAGEMENT** screen appears. *Figure 6-2*.

Figure 6-2

In addition to providing you with a collection of historical information, the **PHONE MANAGEMENT** screen provides you with a list of all reported alarms or problems experienced during the **LAST CONTACT** (or contact attempt) with the phones. These alarms and problems are classified into the following categories:

• Problems reported after PNM Plus has sent outgoing calls to the phone (when downloading commands to the phone).

• Problems reported after PNM Plus has received incoming calls from the phone (when retrieving information from the phone).

• Problems caused by incomplete calls between PNM Plus and the phone.

• Problems that were handled.

These categories are represented by tabs in the **PHONE MANAGEMENT** screen.

With the problems classified, you can more effectively decide how to handle the alarms reported and then initiate work orders or dispatch technicians to the phone for service. The following sections describe these classifications.

6.1.1 OUTGOING CALLS

When you access the **PHONE MANAGEMENT** screen, the **OUTGOING** tab is selected by default (see Figure 6-2). The **OUTGOING** tab displays the phone's status after PNM Plus retrieved information from it. Following is the information this screen provides (represented by the columns in the screen).

- ANI
- Contacted Time
- Cashbox amount
- Last collect amount
- Cash Change amount
- Call Change amount
- Alarm code for the alarm reported by the phone
- Duration of call in seconds
- Reason for termination of the call

If a phone reports an alarm, the alarm code appears in the alarm column. If a phone reports more than one alarm, the alarm codes are separated by colons.

*Since all Outgoing alarms are reported after PNM Plus has communicated with the phone, the **REASON TERMINATED** field in the **OUTGOING** tab is always **COMPLETED**.*

To view the definitions for each alarm and to select only specific alarms you want to display in the **OUTGOING** tab, click on **FILTER** to display the **SELECT CATEGORY OF PHONES TO DISPLAY** screen. See Section 6.2, *Using Filters to Select the Views*, for a description of this screen.

6.1.2 INCOMING CALLS

The **INCOMING** tab displays the list of problems that are reported by a phone that initiated an incoming call. When you select the **INCOMING** tab at the **PHONE MANAGEMENT** screen, the **PHONE MANAGEMENT** screen appears as displayed in Figure 6-3.
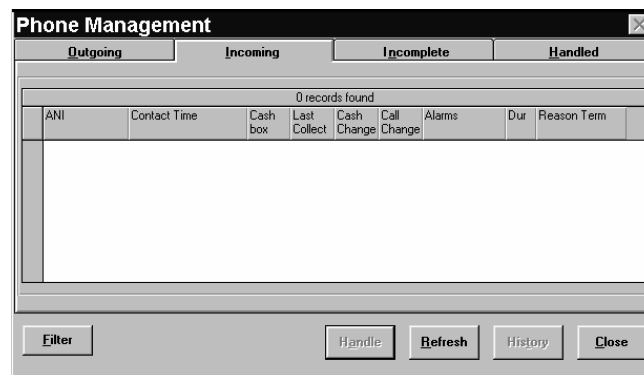
Figure 6-3

Just as for the Polled Problems, the Incoming Problems list provides:

- ANI
- Contact Time
- Cashbox amount
- Last collect amount
- Cash Change amount
- Call Change amount
- Alarm code for the alarm reported by the phone
- Duration of call in seconds
- Reason for termination of the call

If a phone reports an alarm, the alarm code appears in the alarm column. If a phone reports more than one alarm, the alarm codes are separated by colons.

Note: *Since all Incoming alarms are reported after PNM Plus has communicated with the phone, the* **REASON TERMINATED** *field in the* **INCOMING** *tab is always* **COMPLETED**.

To view the definitions for each alarm and to select only specific alarms you want to display in the **INCOMING** tab, click on **FILTER** to display the **SELECT CATEGORY OF PHONES TO DISPLAY** screen. See Section 6.2, *Using Filters to Select the Views*, for a description of this screen.

Unlike the Outgoing Calls, however, Incoming Calls can only be reported by the Poll Manager since the PNM Plus Operator Console does not answer incoming calls. See Section 7.1, *Configuring the Poll Manager*, to review the Poll Manager modem setup needed to allow incoming call types.

6.1.3 INCOMPLETE CALLS

The **INCOMPLETE** tab displays a list of all phones that were dialed without a connection being made. The most frequent reason for an *Incomplete* response is lack of a phone line connection at the remote phone or at the PNM Plus console.

When you select the **INCOMPLETE** tab at the **PHONE MANAGEMENT** screen, the **PHONE MANAGEMENT** screen appears as in Figure 6-4.
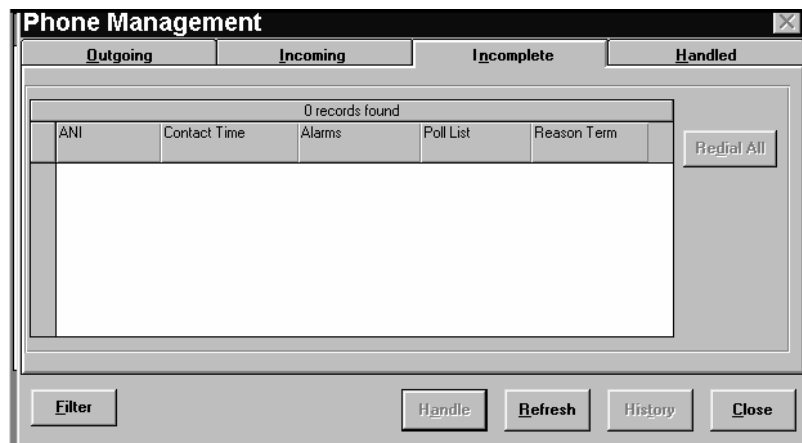
Figure 6-4

The information provided in this list includes:

- ANI of the remote phone.
- Contact Time.
- Alarm code for the alarm reported by the phone.
- Poll list used to dial this phone.
- Reason for call termination.

From this screen, you can click on **REDIAL ALL** to again try to contact the phones.

If a phone reports an alarm, the alarm code appears in the alarm column. If a phone reports more than one alarm, the alarm codes are separated by colons.

To view the definitions for each alarm and to select only specific alarms you want to display in the **INCOMPLETE** tab, click on **FILTER** to display the **SELECT CATEGORY OF PHONES TO DISPLAY** screen. See Section 6.2, *Using Filters to Select the Views*, for a description of this screen.

6.1.4 HANDLED PROBLEMS

The **HANDLED** tab displays the list of all problems handled by the PNM Plus operator and their resolution (e.g., re-dialed phone that reported an Incomplete alarm), or it displays that a work order was assigned. *Section 6.5, Managing Payphone Problems,* shows you how you can handle problems and assign work orders.

When you select the **HANDLED** tab at the **PHONE MANAGEMENT** screen, the **PHONE MANAGEMENT** screen appears as in Figure 6-5.
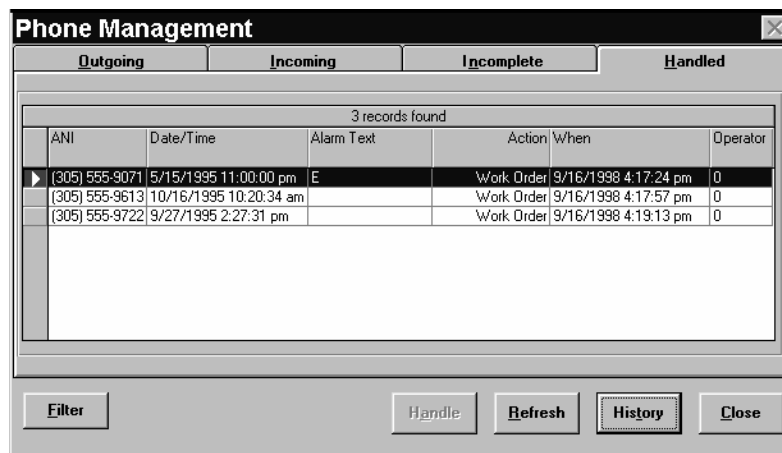
Figure 6-5

The information provided in this list includes:

- ANI of the remote phone.
- Contact Date and Time.
- Alarm or problem reported.
- Action taken to correct the alarm or problem.
- When the action took place.
- Operator ID.

The following table shows the action codes that can be displayed:

Table 6-1

Action Code	Description
Work Order	A Work order was assigned.
By Operator	The "By the operator" option was selected.
No Action Taken	The No Action option was selected.
Action in Progress	Action still in progress.
Re-dialed Phone	The Re-Dial button was selected.

6.2 Using Filters to Select the Views

The list of the reported alarms and problems in the PHONE MANAGEMENT screen can be filtered by one of the following filters:

Table 6-2

Filters	Description
Alarm	Displays all problems for a selected alarm or group of alarms.
Route	Displays all problems reported for the phones that are in a specified route.
Totalizer	Displays all problems reported where totalizer change was less than a specified amount.
Amount Cashbox	Displays all alarms where cashbox amount was greater than a specified amount.
Poll List	Displays all problems reported for the phones that are on a specified poll list.

You can select a filter by clicking on FILTER at any of the PHONE MANAGEMENT screen's four tabs, which displays the SELECT CATEGORY OF PHONES TO DISPLAY screen (see Figure 6-6).
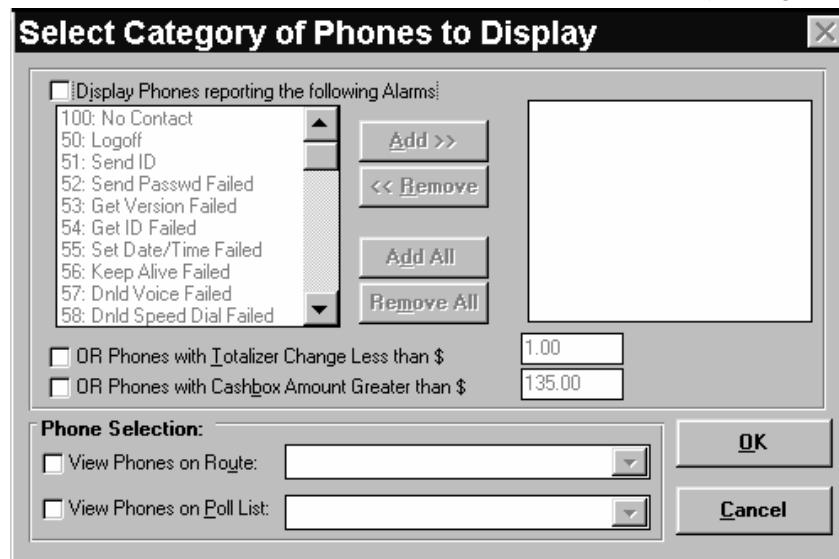
Figure 6-6

To select an alarm as a filter, click on the alarm from the list box and click on ADD. You can add all alarms by clicking on ADD ALL. To select one of the other filters, click on the appropriate check box and then either enter the desired value or select the route or poll list from the drop down list.

If you do not wish to apply the filter, click on CANCEL to return to the PHONE MANAGEMENT screen.

After you select a filter, click on OK to return to the PHONE MANAGEMENT screen. At the PHONE MANAGEMENT screen, you can click on REFRESH to display only the ANIs that match the filter you selected.

6.3 Viewing Contact History

The phone's contact history can be viewed for a selected phone. The contact history includes the date and time stamp of when the alarms and problems were reported, the cashbox amount, the amount last collected, the totalizer amount, the cash change amounts, the change in the call counter, the alarm code reported, the reason for termination of the call, and the poll type. This can be helpful in deciding whether to dispatch a technician to this ANI.

You view contact history information at the **CONTACT HISTORY** screen (see Figure 6-7).

Date/Time	Cashbox	Last Collect	Totalizer	Cash Change	Call Change	Alarms	Reason Term	Poll Type
10/22/1998 11:24:05	$1.75	$0.00	$64.05	$53.85	172		Call Completed	Manual
10/9/1998 3:17:33 pm	$3.50	$0.00	$10.20	$10.20	11	C	Call Completed	Polled
10/9/1998 3:07:42 pm	$0.00	$0.00	$0.00	$0.00	0	100	Busy	Polled

Figure 6-7

You access this screen by performing one of the following three sets of instructions.

Method 1

From the **OPERATOR CONSOLE** screen:

1	Click on the **SERVICE MANAGEMENT** icon.	The **SERVICE MANAGEMENT MENU** appears. *Figure 6-1*.
2	Click on **1** (Phone Status).	The **PHONE MANAGEMENT** screen appears. *Figure 6-2*.
3	Select the phone with the contact history you want to view.	
4	Click on **HISTORY**.	The **CONTACT HISTORY** screen appears. *Figure 6-7*.

Method 2

From the **OPERATOR CONSOLE** screen:

1	Click on the **PAYPHONE ADMINISTRATION** icon.	The **NAVIGATION** screen appears. *Figure 4-1*.
2	At the **PHONES** list box, select the phone with the contact history you want to view.	
3	Click on the phone.	The name of the phone appears in the **PHONE** icon.
4	Click on the **VIEW PHONE CONTACT HISTORY** icon from the PNM Plus toolbar.	The **CONTACT HISTORY** screen appears. *Figure 6-7*.

Method 3

1	From any screen, click on the **FIND A PAYPHONE** icon from the PNM Plus toolbar.	The **FIND A PHONE** screen appears. *Figure 6-8*.
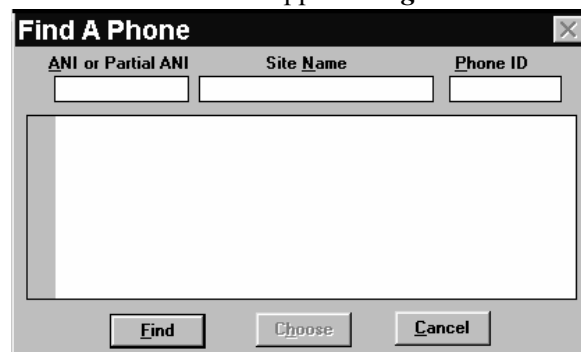
Figure 6-8

2	Enter the ANI of the phone in the **ANI OR PARTIAL ANI** field, the site where the phone is located in the **SITE NAME** field, or the phone's ID in the **PHONE ID** field.	
3	Click on **FIND**.	A list of phones that match your search criteria appears.
4	Click on the box to the left of the desired phone.	
5	Click on **CHOOSE**.	Returns the screen where you selected the **FIND A PAYPHONE** icon.
6	Click on the **VIEW PHONE CONTACT HISTORY** icon from the PNM Plus toolbar.	The **CONTACT HISTORY** screen appears. *Figure 6-7*.

The historical information is saved for the length of time specified in the Poll Manager system settings.

The information display is sorted in descending order with the most recent contact displayed at the top.

The historical information can be used to determine:

- Frequency of repeat problem types.
- Optimization of time intervals between cash box collections.
- Phone utilization analysis.
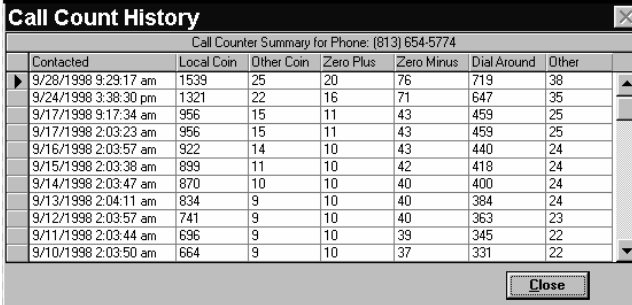
The call counter information can also be reviewed through the contact history display. The call counter information includes the contacted time, the amount of local and other coin types in the cash box, and the number of zero plus, zero minus, dial around, and other types of calls.

Finally, you can review the call detail (SMDR) information for this phone if any is collected. The SMDR information appears in seconds.

6.3.1 VIEWING CALL COUNTERS

From the **CONTACT HISTORY** screen (see Figure 6-7), click on **CALL COUNTERS**.

The **CALL COUNT HISTORY** screen displays the call counters (see Figure 6-9).

Call Count History

Call Counter Summary for Phone: (813) 654-5774

Contacted	Local Coin	Other Coin	Zero Plus	Zero Minus	Dial Around	Other
9/28/1998 9:29:17 am	1539	25	20	76	719	38
9/24/1998 3:38:30 pm	1321	22	16	71	647	35
9/17/1998 9:17:34 am	956	15	11	43	459	25
9/17/1998 2:03:23 am	956	15	11	43	459	25
9/16/1998 2:03:57 am	922	14	10	43	440	24
9/15/1998 2:03:38 am	899	11	10	42	418	24
9/14/1998 2:03:47 am	870	10	10	40	400	24
9/13/1998 2:04:11 am	834	9	10	40	384	24
9/12/1998 2:03:57 am	741	9	10	40	363	23
9/11/1998 2:03:44 am	696	9	10	39	345	22
9/10/1998 2:03:50 am	664	9	10	37	331	22

Figure 6-9

Call counts are categorized by the phone and are based on processing requirements. Calls are typed according to programmed logic, which considers items such as the pattern of the digits dialed, the nature of the termination number, and the method of payment.

6.3.2 VIEWING SMDR

From the CONTACT HISTORY screen (see Figure 6-7), click on **SMDR**.

Note: *You can also view SMDR by clicking on the **SMDR** icon in the PNM Plus toolbar.*

The CALL RECORD HISTORY screen displays the SMDR information (see Figure 6-10).

Figure 6-10

6.4 Managing the History Database

The History database collects problems and alarms, call count information, and SMDR information for a date range that is specified in the Poll Manager system settings. Through the system settings, you can identify the length of the history database in days. If you purge data that is more than 30 days old, all problems and alarms for categories that exceed this date are purged by the Poll Manager upon next polling.

The alarm and call counter data is collected every time a phone is polled. To collect SMDR, you must select the **UPLOAD SMDR** command for the phones you desire. You can also collectively upload SMDR for all phones in a Poll List by selecting this command for the poll list.

Similarly, to execute the **UPLOAD RAM IMAGE** and **UPLOAD DIAGNOSTIC BLOCK** commands, you must specify these commands for the phones or for the poll list. The Upload commands prompt the phone to send a copy of the RAM image or the diagnostic block, each of which is saved by PNM Plus in a file for your review. To view the information contained within these files, see the **SERVICE MAN-AGEMENT VIEW DIAGNOSTICS** and **VIEW RAM IMAGE** functions (see Section 6.8, *Managing Phone Diagnostics*, and Section 6.9, *Viewing RAM Image*).

6.5 Managing Payphone Problems

When you have an alarm, you can decide to take one of the following actions:

- Acknowledge the alarm and take no further action.
- Create a work order for a technician or phone servicing company to service the phone.
- Redial the phone.

You handle alarms listed in any of the **PHONE MANAGEMENT** screen's tabs by selecting the row with the ANI and alarm you want to handle and then clicking on **HANDLE**.

Note: *If the **HANDLE** button is grayed out, the selected record has already been handled. Click on **REFRESH** to move the record to the **HANDLED** tab.*

The **HANDLE REPORTED ALARM** screen appears (see Figure 6-11).

Figure 6-11

The left side of this screen provides summary information on the reported problem, the site contact, the technician, and phone information. The **PROBLEM** field includes codes for the alarms that were reported. You can click on the button next to this field for a definition of the codes.

The screen's **ACTIONS** box provides you with the actions you can take to handle the problem. You can select the appropriate button to assign a work order to a problem, view the problem's history, or dial the phone and execute the desired commands (see Section 5.3, *Dialing your Payphone*).

The screen's **RESOLUTION** box enables you to record how you handled the problem. You can assign a work order to the problem, take no action, or resolve the problem yourself (by operator). Once the problem is resolved, it is moved to the **HANDLED** tab.

If you are going to assign a work order, it is up to you to decide how to use work orders to manage your payphones. Generally, you create a work order to track actions taken by you or your technicians to solve a problem reported on a phone. Along with the resolution steps, you can also track expenses by using the Cost Accounting codes defined in the System Configuration function (see Section 9.2, *Setting Accounting Codes*).

For example, if you enter an account code and cash amount each time an action is taken, PNM Plus enters this information into the Cost Accounting Journal for the specific ANI. Later on, you can review the expenses incurred for this or other ANIs during a technician dispatch or problem solving process.

6.5.1 ASSIGNING A WORK ORDER TO A TECHNICIAN

If you are going to handle a problem by issuing a work order, you need to perform the following steps to assign the work order to a technician.

From the **OPERATOR CONSOLE** screen:

1	Click on the **SERVICE MANAGEMENT** icon.	The **SERVICE MANAGEMENT MENU** appears. *Figure 6-1*.
2	Click on **1** (Phone Status) if you need to determine which of your phones has a problem, **or** click on **2** (Work Order Maintenance) if you already know which phone has a problem.	The **PHONE MANAGEMENT** screen appears, and the **OUTGOING** tab displays problems reported when you polled your phone. *Figure 6-2*. If you selected **2** (Work Order Maintenance), the **WORK ORDER MANAGEMENT** screen appears. *Figure 6-12*. Proceed to step 5 to create a new work order.
3	Select the row with the ANI and alarm you want to handle and then click on **HANDLE**.	The **HANDLE REPORTED ALARM** screen appears. *Figure 6-11*.
4	Click on **WORK ORDERS**.	The **WORK ORDER MANAGEMENT** screen appears for the selected ANI. If this ANI already has work orders assigned to it, they appear in this screen. *Figure 6-12*.
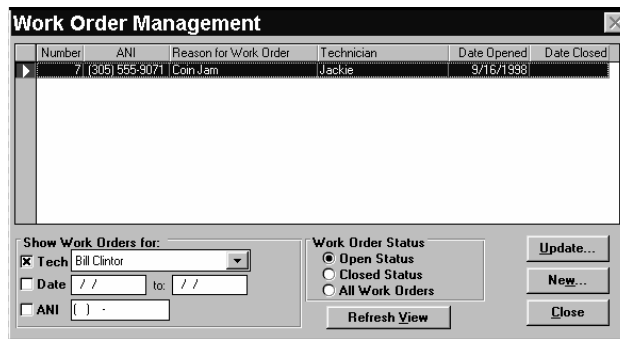
Figure 6-12

5	Click on **NEW** to create a work order.	The **NEW WORK ORDER ENTRY** screen appears. *Figure 6-13*.

Figure 6-13

PNM Plus generates a new Work Order number and time stamp for the work order entry.

6	If you accessed the **WORK ORDER MANAGEMENT** screen from the **SERVICE MANAGEMENT MENU**, enter the payphone ANI in the **PAYPHONE** field.	If the ANI is found in the database, the site name and phone location appear to the right of the ANI when you click outside of this field.
		If you do not know the ANI, select the button to the right of the **PAYPHONE** field. The **FIND A PHONE** screen appears. See Section 6.3, *Viewing Contact History, Method 3,* for an explanation on how to use this screen.
7	Select the reason for the work order from the **PROBLEM** drop down list.	You can modify the descriptions of the problems through the System Configuration-Work Order Codes function. See Section 6.6, *Setting Work Order Codes*, for instructions.
8	Select the technician to assign to this work order from the **TECHNICIAN** drop down list.	
9	If you are able to take an action at this point, go to the next step. Otherwise, go to step 15.	
10	Select the action that you took from the **ACTION TAKEN** field drop down list.	You can modify the descriptions of the actions through the System Configuration-Work Order Codes function. See Section 6.6, *Setting Work Order Codes*, for instructions.

11	Select the account code from the **ACCOUNT CODE** field drop down list.	This ensures that an entry is added to the Cost Accounting Journal with the Account Code specified. The Account Code is only required for actions specified in the **SYSTEM CONFIGURATION** screen **WORK ORDER CODES** tab (see Section 6.6, *Setting Work Order Codes*.)
12	In the **AMOUNT** field, enter the dollar amount associated with this action.	If you are replacing a part, the cost of the part appears when you select an account code.
13	In the **NOTES** field, enter any optional free-form notes.	
14	Click on **OK**.	The work order is created.
		If you completed steps 11-14, a prompt asks if you want to close the work order. Click on YES to close it.
		Returns the **WORK ORDER MANAGEMENT** screen with the work order you created added to the list of any existing work orders for that ANI. If you closed the work order, the date you closed it appears in the **DATE CLOSED** column.
15	Click on **CLOSE**.	If you accessed the **WORK ORDER MANAGEMENT** screen through the **PHONE MANAGEMENT** screen, the **HANDLE REPORTED ALARM** screen appears. The **ASSIGNED TO WORK ORDER** button is selected in the **RESOLUTION** window.
		If you accessed the **WORK ORDER MANAGEMENT** screen from the **SERVICE MANAGEMENT MENU**, you return to the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*
16	Click on **OK**.	The work order is assigned to the technician. Returns the **PHONE MANAGEMENT** screen. *Figure 6-2*.
		The ANI you created the work order for is highlighted, and the **HANDLE** button is grayed.
17	Click on **REFRESH** (optional).	The ANI is moved from the **OUTGOING** tab to the **HANDLED** tab.
18	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

6.5.2 UPDATING WORK ORDERS

All work orders you create (open and closed) are stored in the **WORK ORDER MANAGEMENT** screen. This section shows you how to update them.

From the **OPERATOR CONSOLE** screen:

1	Click on the **SERVICE MANAGEMENT** icon.	The **SERVICE MANAGEMENT MENU** appears. *Figure 6-1*.
2	Click on **2** (Work Order Maintenance).	The **WORK ORDER MANAGEMENT** screen displays the list of all open work orders. *Figure 6-12*.
3	At the screen's **WORK ORDER STATUS** list box, you can select to view: • All Work Orders (open and closed). • Only Work Orders that are Open. • Only Work Orders that are Closed.	
4	At the screen's **SHOW WORK ORDERS FOR** list box, you can change the criterion selection by specifying a Technician, Date range, or Phone ANI to view to narrow the list of work orders. Make sure the check box is selected.	
5	Once you specify the view criteria in steps 4 and 5, click on **REFRESH VIEW** to update the display of work orders.	
6	Select the work order you want to update by clicking on the box to the left of the work order.	

7   Click on **UPDATE**.   The **WORK ORDER STATUS** screen appears. *Figure 6-14*.

Figure 6-14

8   You can select a new problem from the **PROBLEM** drop down list.

9   You can select a new technician from the **TECHNICIAN** drop down list.

10   You can add an action to the work order by clicking on **NEW ACTION**.   The **WORK ORDER ACTION TAKEN** screen appears. *Figure 6-15*.

Figure 6-15

11   From the **ACTION TAKEN** drop down list, select the action that you took.

12	From the **ACCOUNT CODE** drop down list, select the account code for that action.	This classification enables you to manage your expenses by account type. The list of account codes are defined using the System Configuration-Account Codes function (see Section 9.2, *Setting Accounting Codes*). PNM Plus keeps a running total by account code, which can be reviewed using the Cost Accounting function (see Section 9.1, *Cost Accounting Activities*).
13	Enter the amount of the action in the **AMOUNT** field.	
14	Click on the **CLOSE WORK ORDER** box if this is the final action to take for this work order.	The date you closed the work order appears. You can only close work orders if the action taken permits you to do so. To view and modify whether an action taken can close a work order, access the System Configuration-Work Order Codes function (see Section 6.6, *Setting Work Order Codes*).
15	Enter any optional notes for this action in the **NOTES** field.	
16	Click on **OK**.	The **WORK ORDER STATUS** screen displays the actions taken and the date and time they were taken in the **ACTIONS TAKEN ON WORK ORDER** window. If the action taken closes the work order, the **STATUS** field changes to *Closed*. *Figure 6-16*.

Figure 6-16

17	Click on **OK**.	Returns the **WORK ORDER MANAGEMENT** screen. *Figure 6-12*. If you close the work order, it no longer appears when **OPEN STATUS** is selected in the **WORK ORDER STATUS** window.
18	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

6.6 Setting Work Order Codes

PNM Plus provides a Work Order facility to handle alarms reported by the phones or problems reported by the customer. With a work order, you can do the following:

- Manage service technician work load and the corrective actions needed to service the phone.
- Perform cost accounting by tracking costs.
- Keep a log of corrective actions taken for each problem reported.

Each work order consists of a problem description, a set of actions taken, and a date/time stamp. You can customize the list of problems and actions that are displayed in the Work Order Maintenance screens by performing the following tasks.

6.6.1 ADDING OR CHANGING A PROBLEM DESCRIPTION

You add or change a problem description from the **WORK ORDER CODES** tab of the **SYSTEM CONFIG-URATION** screen. See Section 7.3, *Configuring the Operator Console*, for instructions regarding the other features of the **SYSTEM CONFIGURATION** screen.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears**. *Figure 7-4.***
2	Click on **10** (System Configuration).	The **SYSTEM CONFIGURATION** screen appears. *Figure 7-5*.
3	Select the **WORK ORDER CODES** tab.	A list of problem descriptions and corrective actions appears. *Figure 6-17*.

Figure 6-17

4	To change a problem description, highlight the desired row in the **PROBLEM DESCRIPTIONS** list box and then enter over the description.	
5	To add a problem description, use the vertical scroll bar to go to the end of the **PROBLEM DESCRIPTIONS** list box, click in the last row (will be empty), and enter the new description.	
6	Click on **CLOSE**.	The problem description is saved. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

6.6.2 ADDING OR CHANGING A CORRECTIVE ACTION

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears**.** *Figure 7-4.*
2	Click on **10** (System Configuration).	The **SYSTEM CONFIGURATION** screen appears. *Figure 7-5*.
3	Select the **WORK ORDER CODES** tab.	A list of problem descriptions and corrective actions appears. *Figure 6-17*.
4	To change a corrective action, highlight the desired row in the **CORRECTIVE ACTIONS** list box and then enter over the description.	
5	To add a corrective action, use the vertical scroll bar to go to the end of the **CORRECTIVE ACTIONS** list box, click in the last row (will be empty), and enter the new corrective action.	
6	Tab over or click on the **CAN CLOSE?** column and enter **Y** or **N** to indicate if the selected action can be used to close the work order.	
7	Tab over or click on the **ACCT'G REQ'D** column and enter **Y** or **N** to indicate if accounting is necessary.	
8	Click on **CLOSE**.	The corrective action is saved. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

6.7 Managing Complaints and Providing Refunds

In most phone service provider businesses, there is a provision for the management of complaints and customer refunds. With the Elcotel payphone, you can customize the phone to dial a service desk based on your agreement with or provision of a Customer Service function.

Note: *This feature is not available on KX-5502 phones running KX 1.1.5 firmware or earlier.*

In addition, your phone can be set up (through appropriate Registers and Options) to call the Customer Service organization when a customer dials *211*. If such a call is made, PNM Plus provides you with the necessary screens to capture the required data from the customer while maintaining a historical database of customer service complaints and refunds.

6.7.1 ENTERING A CUSTOMER COMPLAINT

From the **OPERATOR CONSOLE** screen:

1	Click on the **SERVICE MANAGEMENT** icon.	The **SERVICE MANAGEMENT MENU** appears. *Figure 6-1*.
2	Click on **3** (Customer Service (211)).	The **CUSTOMER SERVICE** screen appears. *Figure 6-18*.

Figure 6-18

Note: *You also can access this screen by clicking on the 211 icon at the PNM Plus toolbar.*

3	Enter the payphone's ANI in the **ANI** field.
4	Enter the customer's Name, Address, and home phone number in the appropriate fields of the **CALLER INFORMATION** box.

5	Enter the amount to be reimbursed to the customer (if appropriate) in the **AMOUNT** field. PNM Plus defaults this amount to *$0.35*.	
6	Select the radio button within the **HOW HANDLED** box that describes how the problem will be handled (Credit at the phone, Return by mail, or No refund given).	
7	If a refund is due, you can add the amount to the Cost Accounting Journal by selecting the accounting code from the **ACCOUNTING CODE** field drop down list.	
8	Select the reason for the complaint from the **COMPLAINT REASON** field drop down list.	
9	Click on **OK**.	The complaint is entered into the database. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*

6.7.2 REVIEWING THE HISTORY OF CUSTOMER COMPLAINTS

The Customer Service history can be reviewed to determine any possible problem trends that might exist with a particular phone.

From the **OPERATOR CONSOLE** screen:

1	Click on the **SERVICE MANAGEMENT** icon.	The **SERVICE MANAGEMENT MENU** appears. ***Figure 6-1***.
2	Click on **3** (Customer Service (211)).	The **CUSTOMER SERVICE** screen appears. ***Figure 6-18***. You also can access this screen by clicking on the **211** icon at the PNM Plus toolbar.
3	Click on **SHOW HISTORY**.	The **CUSTOMER SERVICE HISTORY** screen appears. ***Figure 6-19***. *Figure 6-19* The **CUSTOMER SERVICE HISTORY** screen displays the ANI of the phone where the complaint originated, the date of the complaint, the caller who registered the complaint, how the complaint was handled, the refunded amount, and the reasons for the complaint.
4	To view the history for a particular ANI, caller name, or caller address, click on **VIEW BY**.	The **SET DISPLAY FILTER** screen appears. ***Figure 6-20***. *Figure 6-20*
5	Select a filter option by clicking on the appropriate radio button and then entering the information in the field.	
6	Click on **OK.**	Returns the **CUSTOMER SERVICE HISTORY** screen. ***Figure 6-19***.
7	Click on **CANCEL**.	Returns the **CUSTOMER SERVICE** screen. ***Figure 6-18.***
8	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1.***
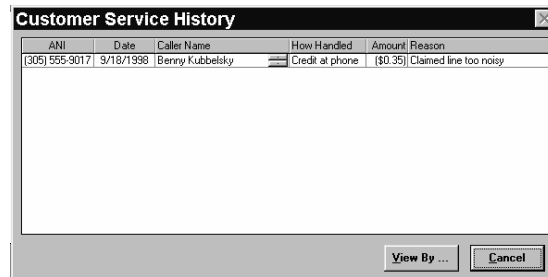
6.8 Managing Phone Diagnostics

The Elcotel Series-5 and KX phones maintain a log of all dialing attempts and calls completed, including:

- Detailed step-by-step process that was followed by the user (through the phone's keypad) and the phone processor.
- Time stamps of when the call started and ended.
- Call processing type and macro ID.
- Dialed digits.
- Cashbox amount.
- Alarm information.

This log can be uploaded to PNM Plus using the **UPLOAD DIAGNOSTIC BLOCK** command during a remote modem telemetry session. The diagnostic block can help facilitate the necessary information to you or to Elcotel's Customer Service representative to determine whether there is a potential problem with the phone, registers and options settings, macros, priority parsing files, or speed dial files.

This information is stored by PNM Plus in a file. By convention, the filename consists of the phone's ANI appended with a *D* (e.g., 40441715.57D) and is located in the directory where the PNM Plus database is located.

Note: *Since, by convention, there is only one file created for each ANI, if you need to keep a copy of the old Diagnostic file, you need to save the file before executing an **UPLOAD DIAGNOSTIC BLOCK** command on that phone.*

In addition, you can verify the correct operation of the phone by reviewing the user and phone processing of dialed digits that can be included in Priority Parsing or Speed Dial files and the call processing that follows based on the macros specified.

Through the View Diagnostic function of Service Management, you can review the latest copy of the diagnostic block uploaded for a given phone *once you perform an **UPLOAD DIAGNOSTIC BLOCK** command during remote modem telemetry.*

From the **OPERATOR CONSOLE** screen:

1	Click on the **SERVICE MANAGEMENT** icon.	The **SERVICE MANAGEMENT MENU** appears. *Figure 6-1*.
2	Click on **4** (View Diagnostic).	The **SELECT PHONE INFORMATION TO VIEW** screen appears. *Figure 6-21*.
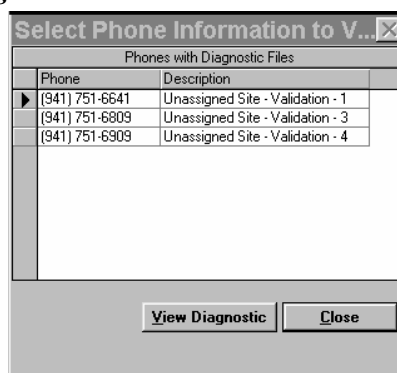
Figure 6-21

3 Click on the box to the left of the row containing the phone you want to view, then click on **VIEW DIAGNOSTIC**.

The **PHONE DIAGNOSTIC INFORMATION** screen appears for the phone you selected. *Figure 6-22*.
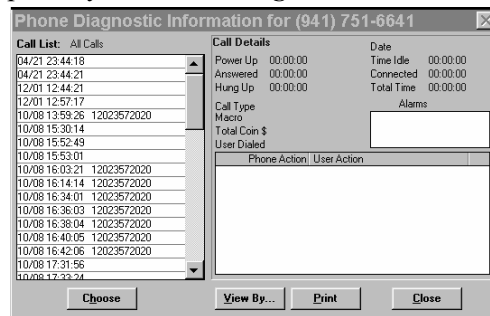
Figure 6-22

The details that appear in this screen includes the following:

- Power Up, Answer, and Hang Up times.
- Date of connection, duration of idle time, duration of connect time, and the total conversation time.
- Alarms.
- Call Type and Macro used.
- Total coin amount (in dollars) collected.
- Phone number that the user dialed.
- Step-by-step Phone and User actions.

4 To choose a call from the list of calls, click on the call, then click **CHOOSE**.

5 To view the call list by specified calling categories, do the following:

- Click on **VIEW BY**.
- Select the desired option, and (if necessary) enter the required descriptor.
- Click on **OK**.

Returns the **PHONE DIAGNOSTIC INFORMATION** screen. *Figure 6-22*.

All Calls-no filtering.

With Call Type-Enter the call type number (local, restricted, etc.)

With Macro-Enter the call processing macro number used.

Where User Dialed-Enter the destination number dialed by the user.

With Call Types Assigned-Select this to display only calls with call types assigned.

With Alarms-Select this to display events in the diagnostic block where alarms were triggered.

Where Call Was Completed-Only displays completed calls.

6 Click on **CLOSE**.

You are asked to delete this file. If you do not delete the file, the contents of this file will be overwritten the next time you contact the phone and execute the **UPLOAD DIAGNOSTIC BLOCK** command.

6.9 Viewing RAM Image

Another important diagnostic tool that enables you to view the contents of the operational files in the phone is the RAM Image view. To obtain a RAM Image, you need to invoke an **UPLOAD RAM IMAGE** command from the Dial Payphone or Polling List functions.

The RAM image upload causes the contents of the Registers and Options file, Rate File, Speed Dial file, and Priority Parsing file to be uploaded from the payphone during telemetry. This information is stored by PNM Plus in a file. By convention, the filename consists of the phone's ANI appended with an *R* (e.g., 40441715.57R) and is located in the directory where the PNM Plus database is located.

Since, by convention, there is only one file created for each ANI, if you need to keep a copy of the old RAM image file, you need to save the file before executing an **UPLOAD RAM IMAGE** *command on that phone.*

From the **OPERATOR CONSOLE** screen:

1	Click on the **SERVICE MANAGEMENT** icon.	The **SERVICE MANAGEMENT MENU** appears. *Figure 6-1*.
2	Click on **5** (View RAM Image).	The **SELECT PHONE INFORMATION TO VIEW** screen appears. *Figure 6-23*.
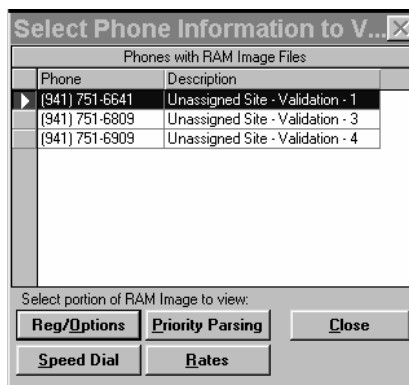
Figure 6-23

3	Select the ANI containing the RAM image you want to view.	
4	Click on **REG/OPTIONS, RATES, PRIORITY PARSING,** or **SPEED DIAL**.	This takes you to the specified areas of the RAM Image and shows you the current contents and values of the files. See Figure 6-24 for a sample of each image.

If the values or the contents of the RAM Image do not match your expectations, review the Phone Detail dates of the operational file download. It might be that the files were not downloaded. You can also select the Download Operational files command to execute during a polling session or during an incoming, outgoing, or next contact telemetry session with the phone.

Registers and Options
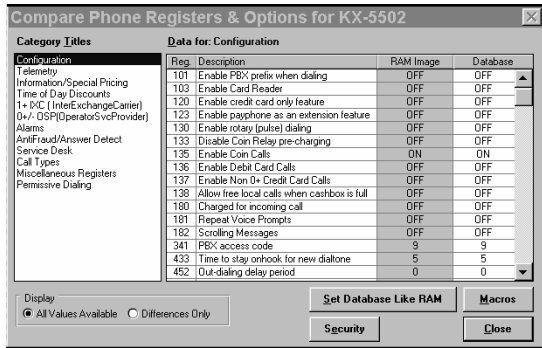
Click on **SET DATABASE LIKE RAM** if you want to overwrite the contents in the database with the contents in the RAM file. (Always ensure that the RAM file is current!)

Click on **MACROS** to display the macros associated with the RAM image.

Click on **SECURITY** to display a screen that enables you to ensure that the security fields for the RAM image match those in the database. If they do not match, you can change the database values in the **PHONE DETAIL** screen.

Click on **CALL OPTIONS** to display the RAM image values for the call options. See Section 8.1.8, *Assigning Call Options to Template Call Type Registers* for a description and sample of the **CALL OPTIONS** screen.

Select whether to view all Registers and Options or only the Registers and Options with values that are different from the values in the database.

Priority Parsing File
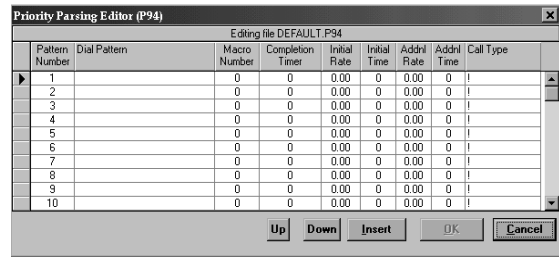
Speed Dial File
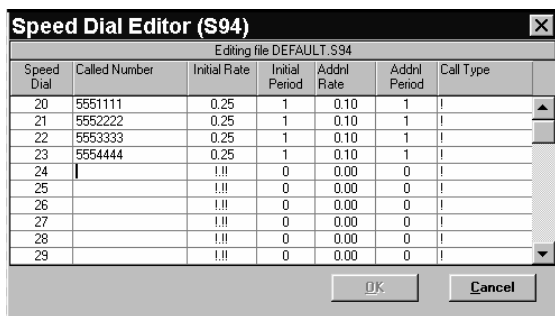
Rate File
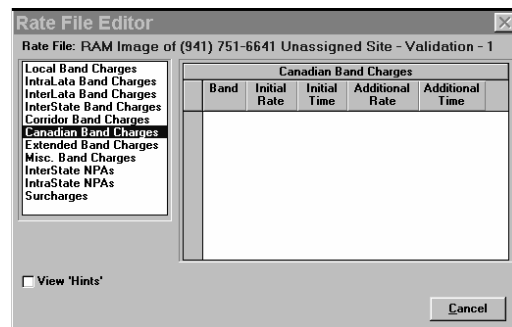
Figure 6-24

7. CONFIGURING YOUR SYSTEM

When Elcotel sent you your PNM Plus system, it configured the system with default values that enable you to use PNM Plus as soon as you install it. PNM Plus enables you to change the default settings and configure your system to meet your specific needs.

For example, you can change the modem and communications port your Poll Manager uses, the database your system accesses for information, the format you use to display your phone numbers, and your operational file settings. The following sections show you how to configure your system.

7.1 Configuring the Poll Manager

The Poll Manager configuration can be modified through the **POLL MANAGER** screen **CONFIGURATION** menu.

The two options in this menu include the following:

- **Modem/Port Setup**

  The Modem/Port Setup enables you to activate or deactivate serial ports that can be used to out-dial or receive incoming calls from the remote payphones. You can also specify modem specific information for each serial port.

- **System Settings**

  The System Settings display the database in use and the phone models in your network. This screen also enables you to modify the configuration of the Poll Manager settings.

Note: *It is important to specify your payphone models prior to setting modem and port configuration (see Section 7.1.1, Viewing and Modifying the System Configuration).*

The Poll Manager program was designed to operate with up to 32 modems. Most workstations, however, are equipped with two communication ports. The communication ports available in most systems are COMM 1 and COMM 2 *or* COMM 3 and COMM 4. Unless additional COMM ports are installed, you are limited to these two communication ports.

The status for each of these ports is provided in the **COMMUNICATIONS/PORT INFORMATION** box (see *Figure 7-1*).


```
Communication/Port Information
Port    Modem Status    Calling Phone      Command Progress
1       Idle
2       Unusable
```

Figure 7-1

The Poll Manager uses COMM Port #2 as the default communication port to which the modem is attached. You can activate a communication port and modify your communication port settings at the **MODEM/PORT CONFIGURATION** screen (see *Figure 7-2*).
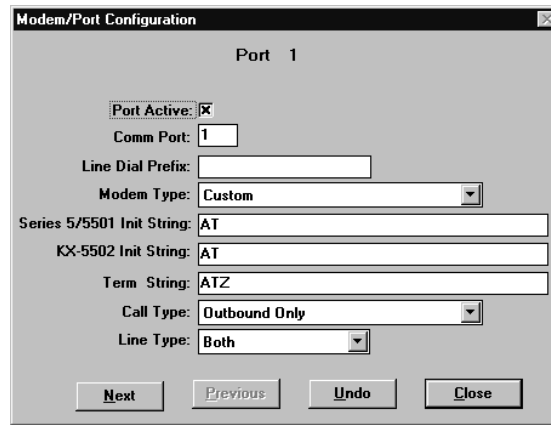
Figure 7-2

7.1.1 VIEWING AND MODIFYING THE SYSTEM CONFIGURATION

From the **POLL MANAGER** screen:

1 Select **CONFIGURATION - SYSTEM SETTINGS**.

The **SYSTEM SETTINGS** screen appears. *Figure 7-3.*
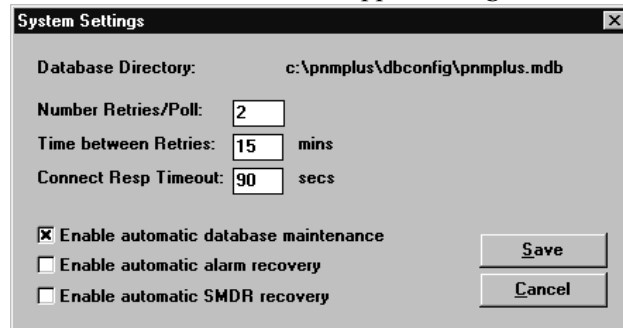
Figure 7-3

The location of the database that Poll Manager is querying appears to the right of **DATABASE DIRECTORY**.

2	From the **SYSTEM SETTINGS** screen, you can do the following:	
	• Select the payphone model types in your network.	If you only have KX-5502 phones or Series 5/5501 phones, selecting the phone type here will eliminate unnecessary fields on other **POLL MANAGER** screens. Select **BOTH** if you have both types of phones in your network.
	• Modify the number of Retries per poll.	The **NUMBER RETRIES/POLL** field determines how many times the Poll Manager will attempt to connect to a phone in a polling session.
	• Modify the amount of time (in minutes) between Retries.	The **TIME BETWEEN RETRIES** field provides time for the phone to become idle. Note that one of the reasons your phone does not answer is because it might be in use.
	• Change how long a connection with the phone should be attempted before a time-out is enacted.	
	• Activate the **ENABLE AUTOMATIC DATABASE MAINTENANCE** flag by selecting the check box to the left of this flag.	Activate this flag if you want Poll Manager to monitor and correct known database problems such as lost/corrupted indexes. This is performed as a real-time background task while the Poll Manager is running.
	• Activate the **ENABLE AUTOMATIC ALARM RECOVERY** flag by selecting the check box to the left of this flag.	Activate this flag if you want Poll Manager to automatically send configuration information having been reported as bad from the phone. (For example, If a phone reports bad rates, Poll Manager automatically sends new rate information.)
	• Activate the **ENABLE AUTOMATIC SMDR RECOVERY** flag by selecting the check box to the left of this flag.	Activate this flag if you want Poll Manager to automatically upload SMDR information when the alarms Q and R are reported.
3	Click on **SAVE**.	Saves the system settings. Returns the **POLL MANAGER** screen. *Figure 3-5*.

Once a poll list is completed, Poll Manager updates the database with historical contact information, alarm information, and with the SMDR (if collected) for all phones in the poll.

You can then perform the following actions:

- View the historical information by clicking on the **VIEW PHONE CONTACT HISTORY** icon at the PNM Plus toolbar.

- View the alarm information by clicking on the **INFORMATION** icon at the PNM Plus toolbar.

- View the SMDR by clicking on the **SMDR** icon at the PNM Plus toolbar.

7.1.2 ACTIVATING A COMMUNICATIONS PORT AND MODIFYING SETTINGS

From the **POLL MANAGER** screen:

1	Select **CONFIGURATION - MODEM SETUP.**	The **MODEM/PORT CONFIGURATION** screen appears. *Figure 7-2*.
2	Click on **NEXT** until the Port you need appears on your screen.	You can click on **PREVIOUS** to return to the previous communications port screen.
3	Select the box located to the right of the **PORT ACTIVE** label.	The communications port is activated.
4	Enter the Communication port number of your PC's modem in the **COMM PORT** field.	
5	Enter the line dial prefix in the **LINE DIAL PREFIX** field if your modem is connected to a switching device such as a PBX.	The components in the following steps are defined in *Table 7-2*.
6	Select the modem type from the **MODEM TYPE** drop down list.	If the Poll Manager is unable to open the port to the modem during modem initialization, the modem status displays *Unusable*. If the port is open but the modem is switched off, the modem status displays *Not Responding*. Poll Manager attempts to use another active modem that is defined for outbound communications.
7	Enter the communication port's initialization string in the **INIT STRING** field.	If you have both phone models in your network, you will have to select one **INIT STRING** for each type of phone.
8	Enter the communication port's termination string in the **TERM STRING** field.	

9	Select the call type from the **CALL TYPE** drop down list.	You can select from the following choices: • Incoming and Outbound • Outbound Only • Incoming Only
10	Select the line type from the **LINE TYPE** drop down list.	Select from the following choices: • Both • Local Only • Long Distance Only
11	Click on **UNDO** if you have made any typing errors.	The original settings will return to the screen.
12	Click on **CLOSE**.	Saves your modem and port settings. Returns the **POLL MANAGER** screen. *Figure 3-5.*

The components that can be viewed or modified include the following.

Table 7-1

Component	Description
Modem Type	The defined modem types
Init String	For Hayes compatible modems, this is usually preceded by an AT command and followed by a string of commands. For other modems, see your modem's reference guide for a list of the command strings required to get the modem's attention.
Term String	For Hayes compatible modems, this is usually ATZ. For other modems, see your modem's reference guide for a list of the command strings required to get the modem's attention.
Call Type	You can select the line as both incoming and outgoing or you can select it as one of the two. The line type defines whether you can receive incoming calls from the Payphone through the selected port. It also defines whether you can dial the payphone using the selected port.
Line Type	You can select the calls to be both local and long distance or you can select them to be one of the two.

Note: *To install additional COMM ports, see Section 7.2, Advanced Poll Manager Installation.*

7.2 Advanced Poll Manager Installation

The advanced installation of the Poll Manager program is required when more than four modem lines are to be connected to the polling computer or when the number of available communication ports is not sufficient to perform polling of all phones in your network.

The advanced installation process involves the installation of a DigiBoard, which allows for the expansion of the number of communication ports available to your computer and also for a special set of instructions required in the Poll Manager and Windows setup files. The enhanced (DigiBoard) version Elcotel PNM Plus payphone network manager is designed to support up to 32 modems for simultaneous polling of a pay telephone network over 32 phone lines.

For a complete description on installing the PNM Plus DigiBoard, see the *PNM Plus DigiBoard Installation Guide* (PN 3350243).

7.3 Configuring the Operator Console

You can customize the PNM Plus program to fit your company environment by using the Configuration function. In the absence of configuration information, PNM Plus sets pre-defined system defaults. You can override these defaults and customize the display formats and contents to more appropriately respond to your needs.

Through the Configuration function, you can modify the system settings that will affect the way your PNM Plus program runs in your PC. Some of the system settings, such as the database location, are stored in the PNMPLUS.INI file.

The System Configuration function groups user-definable attributes of the system into classes. The classes are presented on index cards that can be viewed one at a time.

The attribute classes and the list of parameters that can be configured are shown in the following table.

Table 7-2

Attribute Class	User-Defined Parameters
Accounting Codes	List of account codes
Database	PNM Plus and SMDR database locations
General	Company Name Display of phone ANI Display of phone ID Site and Phone specific variable names
Phone Defaults	Upper and Lower housing keys Phone Security codes Operational File Names
Registers and Options	Set of Registers and Options to use for the Registers and Options templates
Work Order Codes	Problem Descriptions Corrective Actions

7.3.1 SETTING THE DATABASE LOCATION

You set the PNM Plus and SMDR database locations by using the **DATABASE** tab under the Configuration function. The databases can be located in your own computer or in a logical local area drive.

From the **OPERATOR CONSOLE** screen:

---

1   Click on the
         CONFIGURATION icon.

The **CONFIGURATION MENU** appears. *Figure 7-4*.

Figure 7-4

---

2   Click on **10** (System
         Configuration).

The **SYSTEM CONFIGURATION** screen appears. *Figure 7-5*.
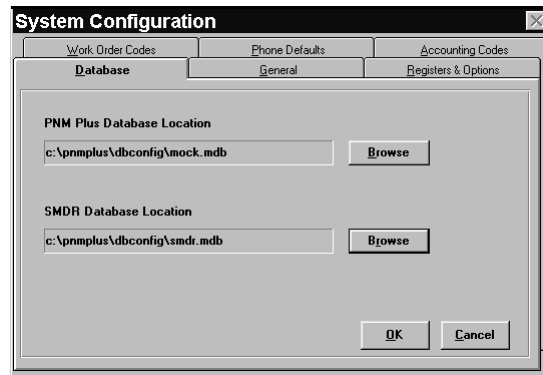
Figure 7-5

Select the Database tab if not already selected. The Database tab contains the following two fields:

- PNM Plus Database Location
- SMDR Database Location

These fields contain the current locations of the PNM Plus and SMDR databases.

3	To change the database locations, click on **BROWSE** next to the field. Ot6herwise, go to step 7.	The **PNM PLUS DATABASE SELECTION** screen appears. *Figure 7-6*.
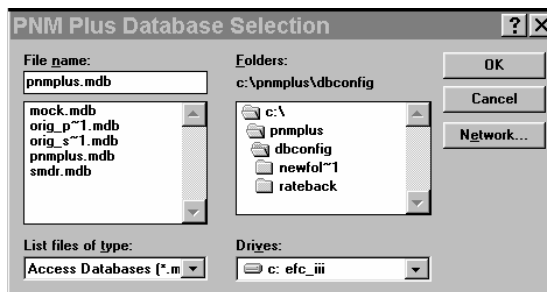
Figure 7-6

4	Select a local or network drive from the **DRIVE SELECTION** drop down list.	
5	In the right list box, open the sub-directory that contains the database.	
6	In the left list box, double click on the database.	Returns the **SYSTEM CONFIGURATION** screen. *Figure 7-5*.
7	Click on **OK.**	The database location is set. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

7.3.2 SETTING GENERAL SYSTEM OPTIONS

PNM Plus enables you to customize your general system options to suit your needs. Through the use of the General system options, you can modify or enter the format of the ANI display, the format of the Phone ID, the variable names used in the **SITE DETAIL** screen, and the variable names used in the **PHONE DETAIL** screen.

7.3.2.1 Modifying the Format of your Phone ANI Display

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **10** (System Configuration).	The **SYSTEM CONFIGURATION** screen appears. *Figure 7-5*.
3	Click on the **GENERAL** tab.	The **GENERAL** fields appear. *Figure 7-7*.
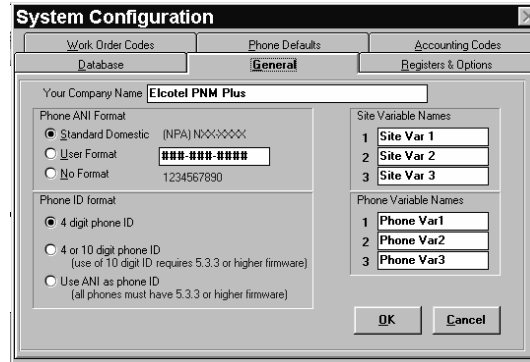
Figure 7-7

4	Select a Phone ANI format from the **PHONE ANI FORMAT** box.	PNM Plus defaults this setting to **STANDARD FORMAT**, which is (NPA) NXX-XXXX. You can change the format to *User Format* or *No Format*.
		If you select **USER FORMAT**, you can add symbols such as dashes (-) and slashes (/) to the phone number. You must specify a number that is 10 digits in length.
		If you select **NO FORMAT**, the phone numbers displayed in PNM Plus do not contain any separating characters such as dashes (-) and slashes (/).
		For example, you can select **USER FORMAT** and specify the format to be ###/###-####. The display of phones is then altered throughout PNM Plus, as in *Figure 7-8*.
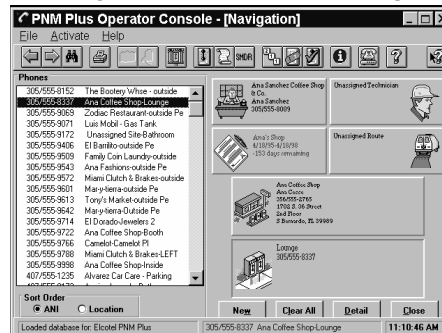
Figure 7-8

5	Click on **OK**.	The general system options are set. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

7.3.2.2 Entering Phone ID Format

In the **PHONE ID FORMAT** fields, you can select the style by which the system will identify the phones. You may select 4 digit, 10 digit, or use the ANI as your identifier.

Note: *Firmware version 5.3.3 or higher must be in all phones using other than 4 digit ID format.*

7.3.2.3 Entering Site Variable Names

In the **SITE VARIABLE NAMES** fields, you can enter any information about a site that you want. This will allow you to select a Site Variable Name from the **SITE VARIABLE** drop down lists in the **SITE DETAIL** screen (see Section 4.4.1, *Adding a Site to the Database*).

7.3.2.4 Entering Phone Variable Names

In the **PHONE VARIABLE NAMES** fields, you can enter any information about a phone that you want. This will allow you to select a Phone Variable Name from the **PHONE VARIABLE** drop down lists in the **PHONE DETAIL** screen (see Section 4.3.2, *Adding a Phone to the Database*).

7.3.3 SETTING PHONE DEFAULTS

Every time you enter a new phone with PNM Plus, you must enter the names of the operational files, the default phone security ID, and the password to be downloaded to the phone. In addition, you can enter the phone housing's upper and lower keys.

With the **PHONE DEFAULT** screen, you can customize the default file selection for any new phone to be added to the database. For instance, if you are about to enter a number of phones that require rate file 813201DF, you can select this file as the default file in the **PHONE DEFAULT** screen prior to starting the data entry. Similarly, you can define the **VOICE, LANGUAGE, PRIORITY PARSING**, **SPEED DIAL, MESSAGES, REP/CARD** and **PROGRAM** defaults.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. ***Figure 7-4***.
2	Click on **10** (System Configuration).	The **SYSTEM CONFIGURATION** screen appears. ***Figure 7-5***.
3	Select the **PHONE DEFAULTS** tab.	The **PHONE DEFAULT** fields appear. ***Figure 7-9***. *Figure 7-9*
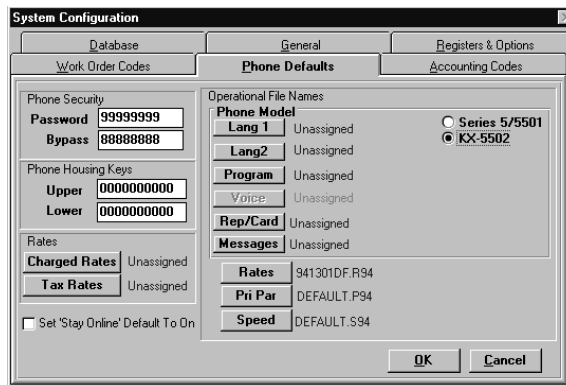
4	Select a phone model type.	Different phone model types have different operational files.
5	To change the security password, security bypass, phone housing upper key, or phone housing lower key, enter the values in the appropriate fields.	
6	If you want to change the default setting for your contact payphone Stay Online feature, click in the box located in the lower left hand corner of the screen.	

| **7** | To change the defaults for any of the operational files, click on the appropriate button.

Note: *Series 5/5501 phones do not support Rep/Cards, Messages, or Language 1 and 2 files. KX-5502 phones do not support Voice Brand files.* | For **PROGRAM**, **VOICE**, and **REP/CARDS**, you must first select the phone model type. These defaults will be specific for each phone model type.

If you click on **VOICE, LANGUAGE 1, LANGUAGE 2** or **PROGRAM**, select the default from the drop down list that appears.

If you click on **REP/CARDS**, select the default from the **KX-5502 REP/CARDS TEMPLATES** screen.

If you click on **CHARGED RATES, TAX RATES, RATES, PRI PAR**, or **SPEED**, select the default from the **CONFIGURATION FILES** screen or **TEMPLATE FILE** screen for that operational file.

For example, if you click on **RATES**, you can select the default Rates file from the **CONFIGURATION FILES - SELECT RATE TABLE** screen and then click on **ASSIGN TO PHONE**. *Figure 7-10*. |
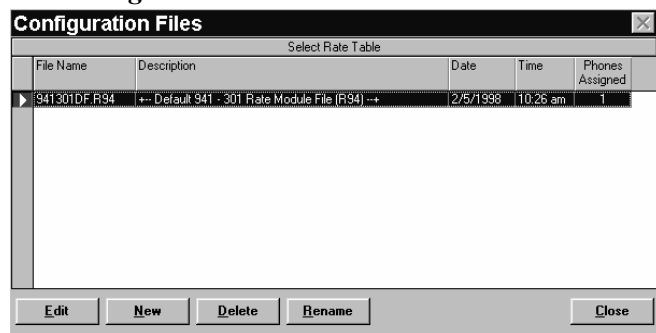
Figure 7-10

The **SYSTEM CONFIGURATION** screen displays the operational file you selected.

| **8** | Click on **OK**. | The phone defaults are set. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.* |

7.3.4 SETTING WORK ORDER CODES AND ACCOUNTING CODES

To set work order codes, see Section 6.6, *Setting Work Order Codes*. To set accounting codes, see Section 9.2, *Setting Accounting Codes*.

7.3.5 CONFIGURING THE REGISTERS AND OPTIONS DISPLAY

An important function of System Configuration is the ability to alter the set of Registers and Options that will be presented to the PNM Plus operator in a Registers and Options template. Elcotel phones have a predefined set of factory default registers and options and values.

Since there are different registers and options available to the different phone model types, you must select the model type in the upper right portion of the screen. *Figure 7-11*.

Through the **SYSTEM CONFIGURATION** screen, Figure 7-11, you can change the description of the Registers and Options. For instance, you can select register number 104 and change its description from *Enable Remote Voice Telemetry* to *Enable Remote Verification of Phone Data*.
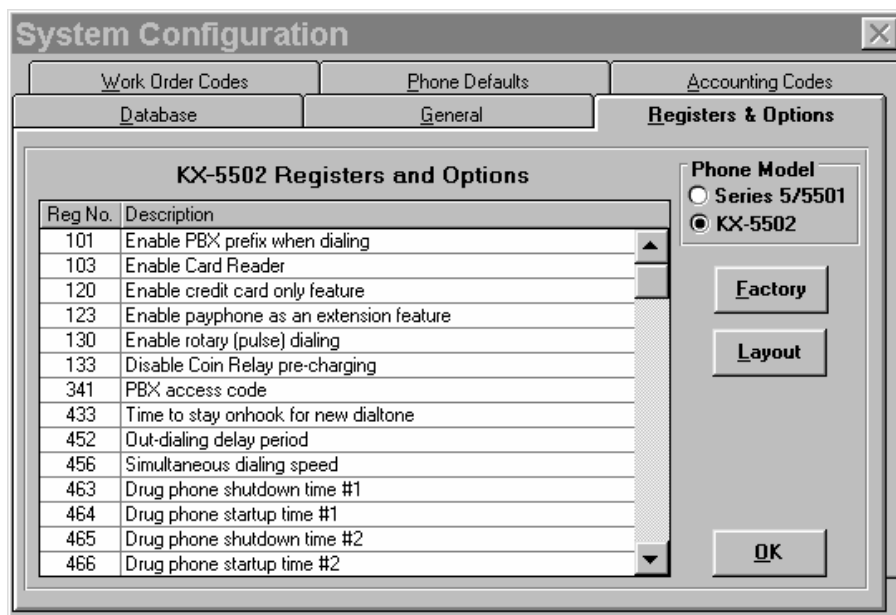
Figure 7-11

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **10** (System Configuration).	The **SYSTEM CONFIGURATION** screen appears. *Figure 7-5*.
3	Select the **REGISTERS AND OPTIONS** tab.	The **REGISTER AND OPTIONS** fields appear. *Figure 7-11*.
4	Select the Phone Model.	Choose from: • Series 5/5501 • KX-5502

5   To change the description of a register or option, click in the **DESCRIPTION** field and enter the new information.

6   To select or change the format of your registers and options, click on **LAYOUT**.

The **REG/OPT DISPLAY - DEFAULT USER DISPLAY** screen appears. *Figure 7-12*.
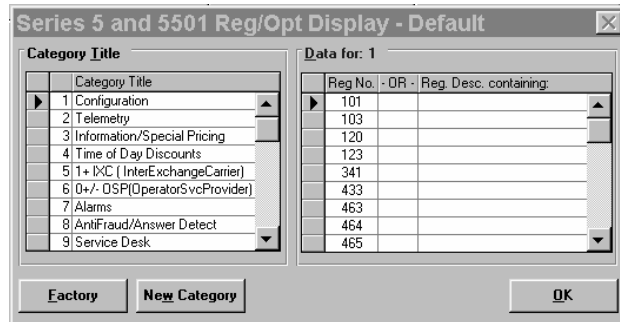
Figure 7-12

This screen's left window displays the list of Registers and Options categories, and the right window displays the registers and options contained within the selected category.

7   You have the following options at the **REGISTERS AND OPTIONS DISPLAY - DEFAULT USER DISPLAY** screen:

• To set the Factory Default settings, click on **FACTORY**.

This updates the display format to all categories, registers, and options that the phone can use.

• To add a Registers and Options category, click on **NEW CATEGORY**.

The **NEW REGISTER/OPTIONS CATEGORY** screen appears. *Figure 7-13*.

Figure 7-13

Enter the name of the new category and click on **OK**.

In the **DATA FOR** list box, add the registers and options you want to include in your new category.

The category appears at the end of the **CATEGORY TITLE** list in the **REG/OPT DISPLAY - DEFAULT USER DISPLAY** screen.

- To delete a Registers and Options category, select the category from the **CATEGORY TITLE** list box and then press the <Delete> key on your keyboard.

- To rename a Registers and Options category, move the insertion point to the desired category in the **CATEGORY TITLE** list box and then enter the new description.

- To add a register or an option to a category, select the category from the **CATEGORY TITLE** list box, move the insertion point to the last row in the **DATA FOR** list box, and then enter the Register or Options code number or description.

- To remove a register or an option from a category, select the category from the **CATEGORY TITLE** list box, select the register or option from the **DATA FOR** list box, and then press the <Delete> key on your keyboard.

8	When you are finished making changes at the **REG/OPT DISPLAY - DEFAULT USER DISPLAY** screen, click on **OK**.	Returns the **REGISTERS AND OPTIONS** tab. *Figure 7-11*.
9	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8. MANAGING PAYPHONE CONFIGURATION

Each of your phones can be personalized to meet your particular business needs. You can specify different tables and files for each individual phone in your database. These tables and files include registers and options, rates, call macros, priority parsing, speed dial, language, voice brand, scrolling messages and rep/cards information.

PNM Plus enables you to modify the contents of these tables and to create new tables. This provides you with a variety of files and settings you can choose for your phones. You can modify your system configuration from the SYSTEM CONFIGURATION MENU (Figure 7-4), which was introduced in the previous chapter.

From the PHONE DETAIL screen, you can modify any of the operational file assignments for a specific phone (see Section 4.5.1, *Editing Phone Information*). In addition, you can use the Configuration-Global Change function to change the file assignment for a group of phones (see Section 8.9, *Applying Changes to Groups of Phones*).

Whenever you make a change to the database contents of a phone, you need to download the new information to the phone. For this reason, Figure 8-1 appears and provides you with five options.
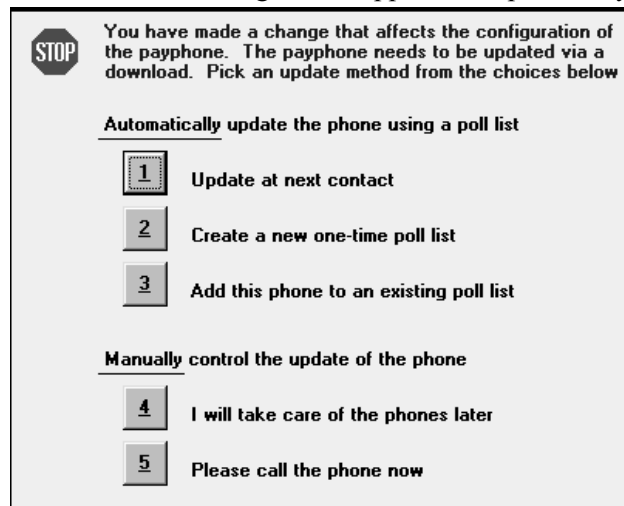
Figure 8-1

This screen enables you to select how you want to download changes you make to a phone's operational files. This screen provides you with the following options:

- If you want the new information downloaded the next time you contact the phone, click on **1** (Update at next contact). This is the recommended selection. To download at next contact, the phone(s) must be assigned to a poll list. To assign phone(s) to a poll list see Section 4.3.3, *Assigning a Poll List to your Phone* or Section 5.1.3.3, *Updating Phones Assigned to a Poll List*.

- If you want to download the new information by creating a one-time poll list and adding the phone to the list, click on **2** (Create a new one-time poll list). Refer to steps 3 through 6 of Section 5.1.1, *Creating a Poll List from the Poll List Maintenance Screen*.

- If you want to download the new information by adding the phone to an existing poll list, click on **3** (Add this phone to an existing phone list). See Section 5.1.3.3, *Updating Phones Assigned to a Poll List*.

- If you want to download the new information manually at a later time, click on **4** (I will take care of the phone later). See Section 5.3, *Dialing your Payphone* to perform a manual download on one phone or Section 5.1.1, *Creating a Poll List from the Poll List Maintenance Screen*, to create a one-time poll list and download multiple phones.

- If you want to use the Dial a Payphone feature to download the new information at the present time, click on **5** (Please call the phone now). See Section 5.3, *Dialing your Payphone*.

Note: *Option 5 is available only if you need to download information to just one phone.*

Once you select any of the five options, the **PHONE DETAIL** screen displays in red the operational file that has not yet been downloaded to the phone.

8.1 Managing Registers and Options Templates

Registers and Options contain most of the control information that determines the operational characteristics of the payphone. An option is like a switch in that it can be ON or OFF. A register contains a value. Through the Registers and Options Templates configuration, you can create a separate Registers and Options template containing desired values of registers and options. These templates can be used to initially set the registers and options of a particular phone and will be displayed on the **PHONE DETAIL** screen as the **BASE TEMPLATE** (see Figure 4-7). For each of the phones, you can then change values within the registers and options to suit the specific requirement of the phone.

Note: *If you make changes to a template after you have created a phone Registers and Options file, NO PHONES ARE AFFECTED.*

For example, you can define a template for all phones that are version 5.3.x and are located in the state of Virginia. When installing a new location in Virginia, you can use the **SET LIKE** button to set the registers and options of the new ANI to resemble the template. Then, on a phone-by-phone basis, you can change the values of specific options or registers.

Using the Configuration Management of Registers and Options templates, you can perform the following functions:

- Modify the values contained in the Registers and Options templates.

- Import and Export Registers and Options Templates.

- Search for a register or option.

- Compare registers and options.

- Set the values of a Register and Option template to match those in an existing template or phone.

- View the Factory default setting for Registers and Options.

- Assign User-Defined call processing macros to a Registers and Options file.

- Assign call options to the call type registers.

You manage a Registers and Options template from the **REGISTERS AND OPTIONS** screen (see Figure 8-2).

PNM Plus groups registers and options into categories. For example, all registers and options relating to alarms are grouped in the Alarms category. These categories are listed in the **CATEGORY TITLES** list box. When you select a category from this list box, the related registers and options and their values are listed in the window to the right of the list box.
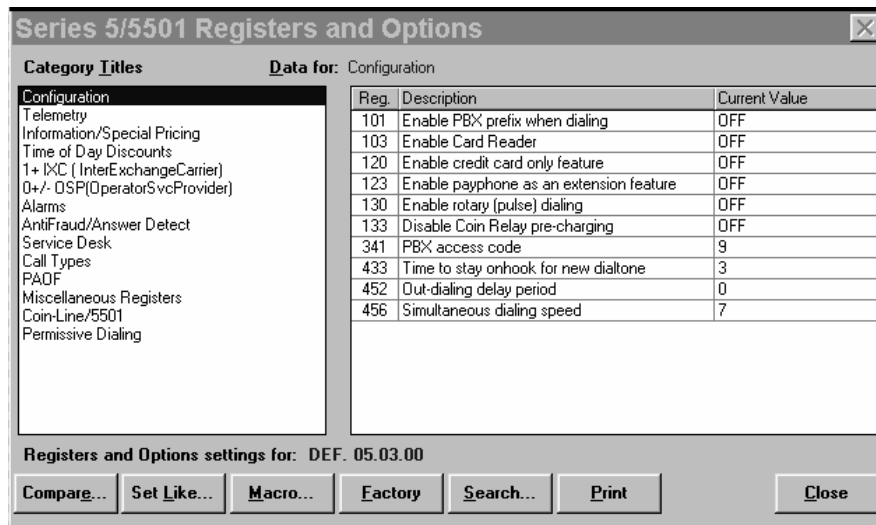
Figure 8-2

8.1.1 MODIFYING VALUES FOR REGISTERS AND OPTIONS

For each register and option that appears in the **REGISTERS AND OPTIONS** screen, you can change its value.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
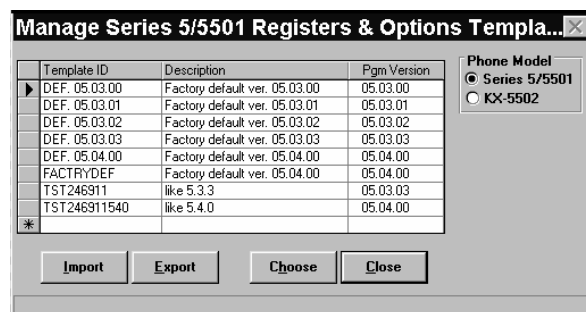
Figure 8-3

3	Select the phone model type for the Registers and Options you want.	Note:	*There are differences in the Registers and Options available for the different phone model types.*
4	Highlight the Register and Option template you want by clicking on the box to the left of the template.	Note:	*If you want to create a new template, simply enter the new template name in the last row on the MANAGE REGISTERS & OPTIONS TEMPLATES screen. You may have to scroll down to get to the last row.*

5	Double click on the template name or click on **CHOOSE**.	The **REGISTERS AND OPTIONS** screen appears. *Figure 8-2*.
6	At the **CATEGORY TITLES** list box, click on the category where the desired register or option can be found.	A list of that category's registers and options appears in the **REGISTERS AND OPTIONS** screen's right-side window. **Note:** *If you do not know the Category where the desired Register or Option can be found, see Section 8.1.3, Searching for a Register or Option.*
7	With your **<Tab>** key or with the mouse, move the insertion point to the row in the right-side window containing the desired register or option.	
8	Enter the value for this register or option.	The valid range of values appears in a box above the **CURRENT VALUE** column.
9	Click on **CLOSE**.	The values for the registers and options are set. Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.1.2 IMPORT AND EXPORT REGISTERS AND OPTIONS TEMPLATES

PNM Plus has the ability to import and export registers and options templates. This feature could be used as an aid while troubleshooting various phone problems. It will allow users and customer support to easily transfer templates to each other. Through this functionality, a customer support representative should be able to create a registers and options template in PNM Plus. This template could be exported to a newly created database, and the file could be transferred to a customer. The customer should then be able to import this template into their existing PNM Plus database, assign it to a phone and then download it to that phone.

8.1.2.1 Import a Registers and Options Template

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*

4	Click on the **IMPORT** Button.	The **IMPORT FROM DATABASE** screen appears. *Figure 8-4.*
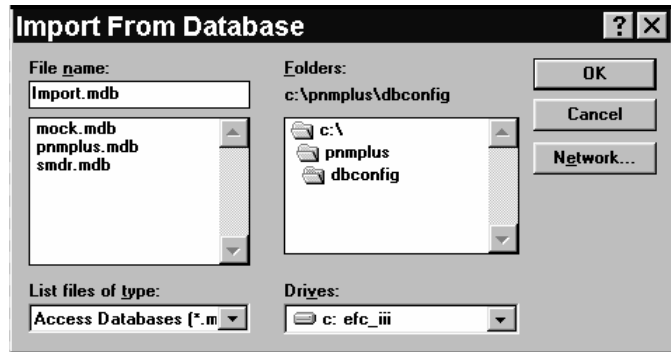
Figure 8-4

5	Select the drive, path, and filename of the database containing the template you wish to import.	
6	Click on **OK**.	The **SELECT TEMPLATE TO IMPORT** screen appears. *Figure 8-5.*
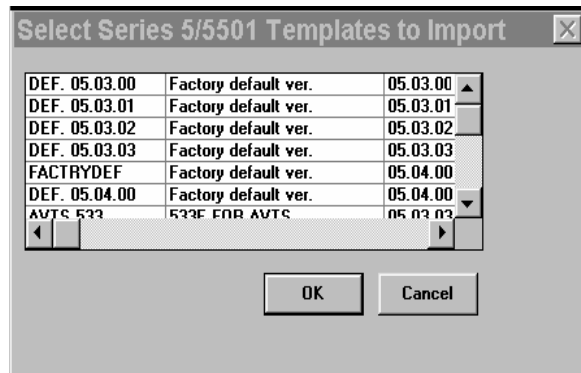
Figure 8-5

7	Click on the Template you wish to import to highlight the selection.	
8	Click on **OK**.	The Registers and Options Template is imported to your working database. You return to the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
9	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*. The Template is now available to be downloaded to any of your phones. See Section 4.3.5, *Setting Payphone Registers And Options* or Section 8.9, *Applying Changes to Groups of Phones*.

8.1.2.2 Export a Registers and Options Template

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*
4	Click on the **EXPORT** button.	The **EXPORT TO DATABASE** screen appears. *Figure 8-6.*
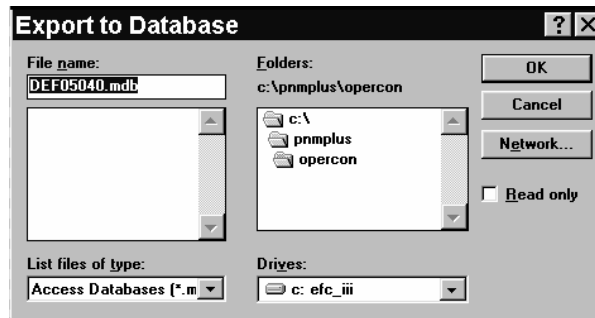
Figure 8-6

5	Select the destination drive, location, and database name for the database to which you wish to export the template.	
6	Click on **OK**.	When the action is completed, PNM Plus will inform you. *Figure 8-7.*

Figure 8-7

7	Click on **OK**.	Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.1.3 SEARCHING FOR A REGISTER OR OPTION

If you know the specific register or option you want to display in the **REGISTERS AND OPTIONS** screen, PNM Plus enables you to search for it.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*
4	Highlight the Register and Option template you want by clicking on the box left of the template.	
5	Double click on the template name or click on **CHOOSE**.	The **REGISTERS AND OPTIONS** screen appears. *Figure 8-2*.
6	Click on **SEARCH**.	The **REGISTERS & OPTIONS LOOKUP** screen appears. *Figure 8-8.*

Figure 8-8

7	Enter the Register or Option number in the **REG NO.** field, or enter a partial or complete description in the **REGISTER DESC.** field.	If you enter a partial description, all registers and options matching the description appear.
8	Click on **SEARCH**.	The register or option number, description, and current value appear in the corresponding columns.
		Note: *You can click on **FACTORY** to search or display on the basis of the Factory description. You can then click on **USER** to display and search on the basis of user-defined descriptions.*
9	Click on **CLOSE**.	Returns the **REGISTERS AND OPTIONS** screen. *Figure 8-2*.

10	Click on **CLOSE**.	Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.1.4 COMPARING REGISTERS AND OPTIONS

PNM Plus enables you to compare the values of a template's registers and options with the values in a RAM image, in a specific phone, in another template, or in the factory default settings. You can then change the values in the template to the values of the RAM image, phone, template, or factory default.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*
4	Highlight the Register and Option template you want by clicking on the box left of the template.	
5	Double click on the template name or click on **CHOOSE**.	The **REGISTERS AND OPTIONS** screen appears. *Figure 8-2*.
6	Click on **COMPARE.**	The **COMPARE PHONE REGISTERS & OPTIONS** screen appears. *Figure 8-9*.
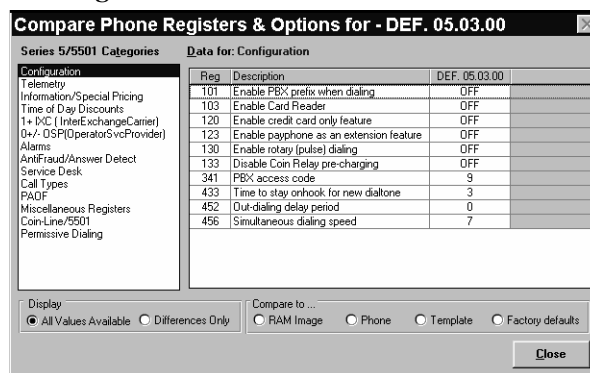
Figure 8-9

This screen displays the registers and options related to the category selected in the **CATEGORY TITLES** list box. The values that appear for the registers and options are defined in the template you selected in the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen.

7	To select a different category, click on the category in the **CATEGORY TITLES** list box.	The registers and options related to that category and their template values appear. You can compare the values for the displayed registers and options with the values set in the RAM image, another phone, another template, or in the factory defaults.
8	In the **COMPARE TO** window, click on the radio button containing the registers and options you want to compare with the registers and options that are displayed.	The values for the matching registers and options appear next to the values in your template. *Figure 8-10* displays an example of the template values for the AntiFraud/ Answer Detect category being compared with the values set in the factory defaults. *Figure 8-10*
9	If you only want to see the values for the registers and options that are different, click on the **DIFFERENCES ONLY** radio button in the **DISPLAY** window.	
10	If you want the registers and options values in your template to match the values they are being compared to, click on the **MAKE DATABASE LOOK LIKE...** button.	
11	Click on **CLOSE**.	Returns the **REGISTERS AND OPTIONS** screen. *Figure 8-2*.
12	Click on **CLOSE**.	Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
13	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.
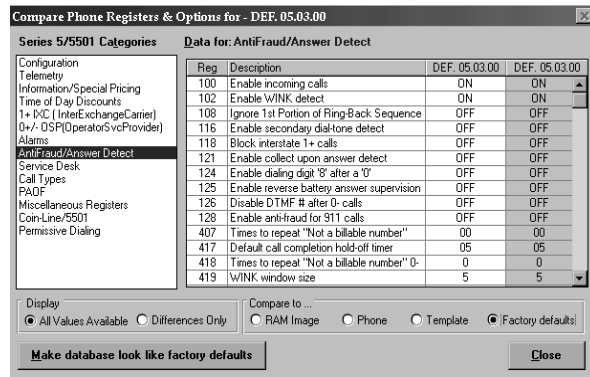
8.1.5 SETTING REGISTERS & OPTIONS TO MATCH A TEMPLATE OR PHONE

You can set your template's registers and options values to match those of another template or phone by using the **REGISTERS AND OPTIONS** screen Set Like feature.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*
4	Highlight the Register and Option template you want by clicking on the box to the left of the template.	
5	Double click on the template name or click on **CHOOSE**.	The **REGISTERS AND OPTIONS** screen appears. *Figure 8-2*.
6	Click on **SET LIKE**.	The **SET REG/OPTS TO BE LIKE** screen appears. *Figure 8-11*.

Set Reg/Opts for DEF. 01.00.00 to be like:

Use KX-5502 Template:

DEF. 01.00.00	Default KX-5502 ver. 01.00.00
DEF. 01.01.00	Default KX-5502 ver. 01.01.00
DEF. 01.02.00	Default KX-5502 ver. 01.02.00
DEF. 01.03.00	Default KX-5502 ver. 01.03.00

Or Make Like the KX-5502 Model Phone:

| (555) 555-5354 | Unassigned Site - outside |
| (999) 999-9999 | Unassigned Site - dummy fon |

OK   Cancel
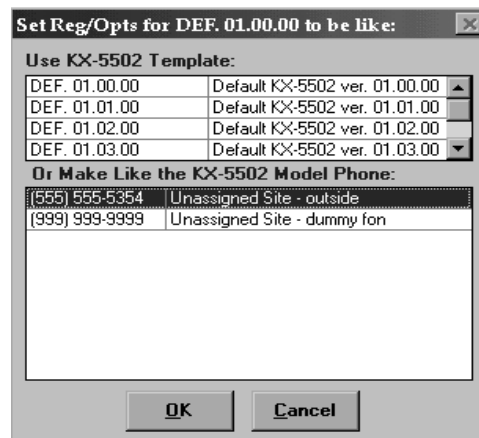
Figure 8-11

7	Click on the desired template or phone.	
8	Click on **OK**.	The registers and options for your template are set like those in the selected template or phone. Returns the **REGISTERS AND OPTIONS** screen. *Figure 8-2*.
9	Click on **CLOSE**.	Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.1.6 VIEWING FACTORY DEFAULT DESCRIPTION FOR REGISTERS & OPTIONS

In some cases, the descriptions that appears in the **REGISTERS AND OPTIONS** screen beside the Register or Option numbers might not match the description in Elcotel's documentation, or it might not be recognized by you or a Customer Service representative. In those cases, you can toggle between the User-Defined description and the Factory description. When viewing user or factory descriptions, the values of the registers and options are not affected.

From the **OPERATOR CONSOLE** screen:

|		
1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*
4	Highlight the Register and Option template you want by clicking on the box left of the template.	
5	Double click on the template name or click on **CHOOSE**.	The **REGISTERS AND OPTIONS** screen appears. *Figure 8-2*.
6	Click on **FACTORY**.	The factory default descriptions for the registers and options appear.
7	To return to the user-defined descriptions, click on **USER**.	
8	Click on **CLOSE**.	Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
9	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.1.7 ASSIGNING MACROS TO A REGISTER AND OPTION TEMPLATE

You can define up to six call processing macros for each Registers and Options template. These macros are stored in Registers 300 through 305. If you download a Priority Parsing, Speed Dial, or Rep/Cards file containing reference to a user-defined macro number (45 through 50), you MUST specify the macro number for the Registers and Options file downloaded to the phone.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.

3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*
4	Highlight the Register and Option template you want by clicking on the box left of the template.	
5	Double click on the template name or click on **CHOOSE**.	The **REGISTERS AND OPTIONS** screen appears. *Figure 8-2*.
6	Click on **MACRO.**	The **MACROS FOR** screen appears. *Figure 8-12*.

Figure 8-12

7	Click in the far right portion of the **NAME** field for the macro you wish to assign**.**	A drop down arrow appears on the screen.
8	Select the macro you want to use from the drop down list.	**Note:** *If you need to create a macro, see Section 8.4, Managing User-Defined Call Processing Macros.* The list of commands in the macro appears. Use the scroll box at the bottom of the screen to determine the action associated with each command.
9	After you have set all the macros the way you want them, click on **OK**	The macros are assigned to the template. Returns the **REGISTERS AND OPTIONS** screen. *Figure 8-2*.
10	Click on **CLOSE**.	Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.1.8 ASSIGNING CALL OPTIONS TO TEMPLATE CALL TYPE REGISTERS

For all Series 5/5501payphones with a software version of 5.3.1 or higher and KX-5502 payphones, you can assign a call option to each Call Type register (registers 200-299). These call options are associated with the phone's new Drug Phone feature. This feature enables you to restrict certain call types (as defined in registers 200-299) for up to two different time periods during the day. These time periods are usually when drug dealers are most likely to use the phone. The start and stop times of these periods are defined in registers 463 to 468.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **1** (Registers and Options Templates).	The **MANAGE REGISTERS & OPTIONS TEMPLATES** screen appears. *Figure 8-3*.
3	Select the phone model type for the Registers and Options you want.	**Note:** *There are differences in the Registers and Options available for the different phone model types.*
4	Highlight the Register and Option template you want by clicking on the box to the left of the template.	
5	Double click on the template name or click on **CHOOSE**.	The **REGISTERS AND OPTIONS** screen appears. *Figure 8-2*.
6	Click on **CALL OPTIONS**	The **CALL OPTIONS** screen appears. *Figure 8-13*.

Figure 8-13

The call options for all Call Type registers default to **OFF**.
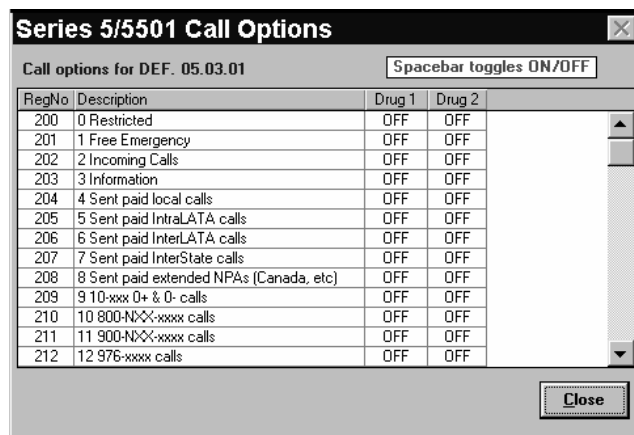
7	For each call type register you want to restrict, click in the column for the time period (**DRUG 1** or **DRUG 2**) you want to restrict and then press the spacebar.	The call option changes to **ON**.
8	Click on **CLOSE**.	Returns the **REGISTERS AND OPTIONS** screen. *Figure 8-2*.
9	Click on **CLOSE**.	Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. *Figure 8-3*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.2 Managing Rate Files

Elcotel phones use a set of rate files to determine pricing for a call made from a phone in a specific Area Code and exchange. For each phone, a rate file needs to be downloaded. The rate file does the following:

- Provides the phone with its NPA and NXX information.
- Determines the charge type based on the terminating NPA NXX combination.
- Provides surcharges for special calls (e.g., collect and operator assisted calls).

The prices defined in the rate file enable the phone to determine the type of call and the per period pricing that applies. The types of calls are Local, Intra-LATA, Inter-LATA, Inter-State, Extended, Corridor, and Miscellaneous.

The following diagram illustrates some of these types of calls:

Home NPA 941, LATA 952, Sarasota

Area Code 941

LATA 952

LATA 939

Area Code 305

LATA 460

Area Code 404

E

A

Sarasota

Miami

F

LATA 438

B

D

C

Ft. Myers

Atlanta

Winter
Haven

Tampa

Area Code 813

Florida   **Georgia**

Key

A = Local
B = IntraLATA
C = IntraLATA
D = InterLATA
E = InterLATA
F = InterState
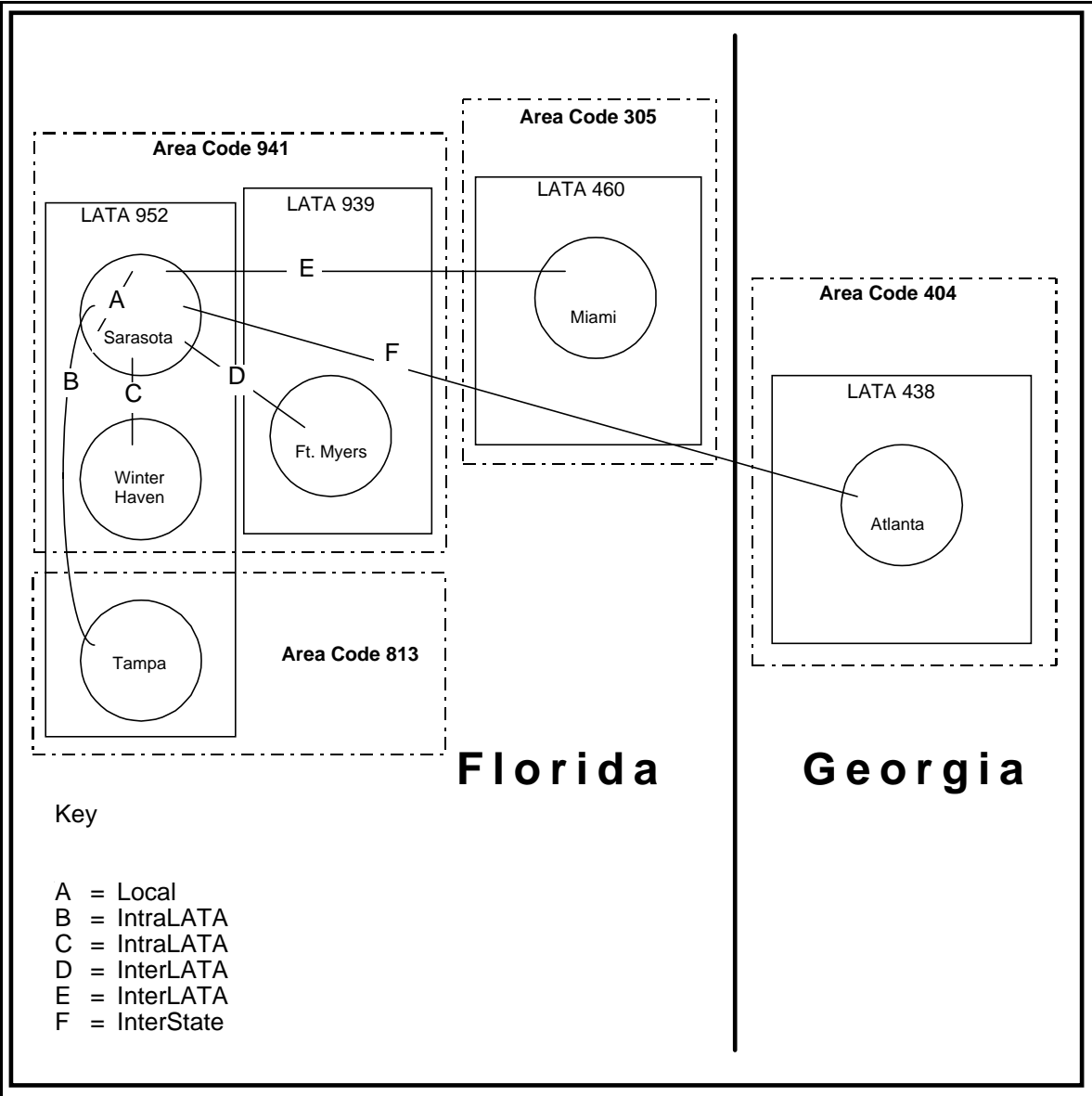
The Rate File capacity is 250 price bands in a maximum of 120 NXX tables, with each NXX table having a capacity of 800 NXXs. PNM Plus can maintain up to 10,000 rate files.

The following diagram illustrates the hierarchy of the information contained in the Rate Editor Files.

```
                          ┌─────────────────────┐
                          │ Originating NPA-NXX  │
                          │   (Rate Center)      │
                          └─────────────────────┘
          ┌───────────────────────┼───────────────────────┐
  ┌───────────────┐     ┌─────────────────────┐   ┌─────────────────────┐
  │  Surcharges   │     │ Terminating NPA-NXX  │   │ Terminating NPA-NXX  │
  │               │     │   (Intrastate NPA)   │   │   (Interstate NPA)   │
  └───────────────┘     └─────────────────────┘   └─────────────────────┘
  ┌───────────────┐     ┌─────────────────────┐   ┌─────────────────────┐
  │ Surcharges by │     │   Price Band by      │   │   Price Band by      │
  │   LATA Type   │     │     NPA-NXX          │   │     NPA-NXX          │
  └───────────────┘     └─────────────────────┘   └─────────────────────┘
```

Local
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

IntraLATA/IntraState
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

InterLATA/IntraState
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

InterState
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

Corridor (if present)
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

Extended
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

Canadian
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

Miscellaneous
    Bands 1, 2, 3, etc.
       Initial Amount
       Initial Period
       Additional Amount
       Additional Period

8.2.1 OBTAINING RATE FILES

Rate files can be obtained by downloading from the Elcotel Web Site at www.elcotel.com.

Rate center files are named for the requested NPA and the lowest NXX in the group of NXXs for which the file is usable, and has a filename extension of "R94" (for example, "604205DF.R94"). The "DF" denotes default or "as supplied."

Elcotel accomplishes a high level of accuracy and reliability in rate center files through a collection of telecommunications source references and publications and a specialized staff who corroborate all information directly with the LEC at the exchange level. For Operating Companies without published tariffs, information is obtained through direct contact. Elcotel is committed to providing the most accurate and comprehensive rate center data in the industry.

8.2.2 CONTENTS OF A RATE FILE

A Rate File contains the list of all rate center exchanges (NPA NXXs) that apply to the rates in the file. In addition, you can use the PNM Plus rate editor to modify nine price band categories, Intra-State area codes, Inter-State area codes, and surcharge amounts for Service Desk calls.

Price and Price Bands

The following table describes the price band categories that can be edited with PNM Plus. For each rate file, there are prices and time lengths for the initial and additional periods. The prices of these are listed in multiples of 5 cents (nickels) and can be defined within the $0.00 to $9.95 range.

Note: *If you define the price as $9.95, the call is blocked and the phone returns an invalid number message.*

The time periods are expressed in minutes and can range from 0 - 60 minutes. The time periods also can be set to *98* (or *R*) to restrict calls or *99* (or *U*) for Unlimited time.

Charges	Description
Local Band	Local Call Charges
Intra-LATA Band	Calling Charges for calls terminating within the home LATA limits
Inter-LATA Band	Calling Charges for calls terminating outside of home LATA limits - in general within a State
Inter-State	Calling Charges for calls terminating outside the home State
Corridor Band	An FCC tariffed calling plan crossing state borders that permits special call pricing instead of FCC InterState pricing
Canadian Band	Calling Charges for calls terminating to a Canadian exchange
Extended Band	Charges for calls terminating to 809 area codes (Bermuda, Puerto Rico, Virgin Islands, and other Caribbean islands)
Misc. Band	Charges for calls terminating to a Miscellaneous Band
Surcharges	Additional charges for selected call types

Surcharges

The price surcharges are applied to the initial or additional periods. The surcharges can be applied to all types of calls, including coin calls, collect calls, credit card calls, and operator calls. The phone stores the surcharges by price band category, and the surcharges can be uploaded to PNM Plus. The phone *backs out* this value when calculating discounts on calls.

Intra-State NPAs

Each rate file contains a list of NPAs that are located within the state boundary (can be out of state if a corridor is present). Any calls terminating to NPAs in this list are typically Local, Intra-LATA, or Inter-LATA Intra-State.

Each of the Intra-State NPAs contains a set of exchanges (NXXs) serviced by the local exchange company (LEC). The pricing of calls terminating to the Intra-State NPA-NXX depends on the proximity of the originating and terminating NPA - NXX combinations and on the pricing structure of the LEC service provider. Therefore, for all possible terminating NPA-NXXs, you must specify the pricing band that applies.

In some cases, certain NPA NXXs are not valid or not yet defined in the Rate File and therefore appear as *Unlisted*. If a call is terminated to an unlisted Intra-State NPA-NXX, the pricing band selected for the Unlisted call type applies.

Interstate NPAs and Restricted NPAs

For each rate center file, there is a set of NPAs located outside the state boundaries where the Rate Center is located. These NPAs are Interstate NPAs. Inter-State NPAs are priced using any of the Inter-State, corridor (if present), Canadian, extended, and miscellaneous pricing categories. Usually, Inter-State call pricing is mileage sensitive; the shorter the distance from the originating state to the terminating state, the lower the price.

In the United States, there is some Inter-State pricing that applies to calls placed to specific bordering Canadian locations.

A call to an NPA can also be restricted by classifying an NPA as a Restricted NPA. Calls made to Restricted NPAs are not processed by the phone.

Rate Centers and Applicable Exchanges

Each Rate File applies to one Rate Center. For each Rate Center, there are a number of exchanges that use the same rate file. These exchanges are provided by the servicing LEC company and are already predefined for you. You can download a Rate File to any phone located within an NPA-NXX combination defined under the Rate Center Exchange list.

8.2.3 CREATING A RATE FILE

When you create a rate file, you use an existing rate file as a template.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
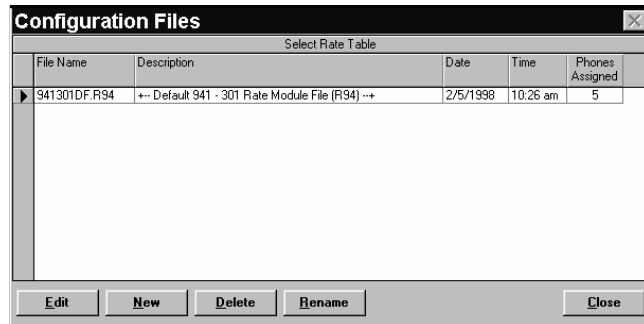
Figure 8-14

3	Select the Rate File template you want to use for the new rate.	
4	Click on **NEW**.	The **PNM PLUS** screen appears. *Figure 8-15*.
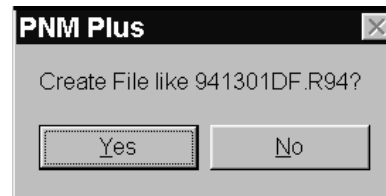
Figure 8-15

5	Click on **YES** to create a rate file like the chosen rate file.	The **ENTER FILE INFORMATION** screen appears. *Figure 8-16.*
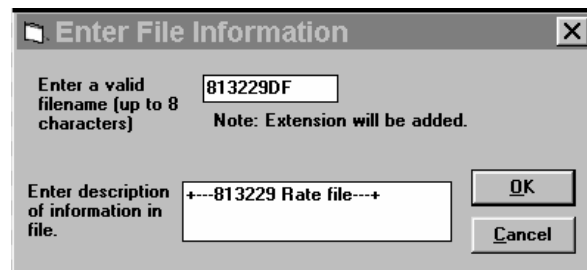
Figure 8-16

6	Enter the Rate File name and a description of the contents of the new file in the appropriate fields.	

7	Click on **OK.**	Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen with the new Rate File added to the list of available files. *Figure 8-14*.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.2.4 EDITING A RATE FILE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Highlight the desired rate file by selecting the box to the left of the file name.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
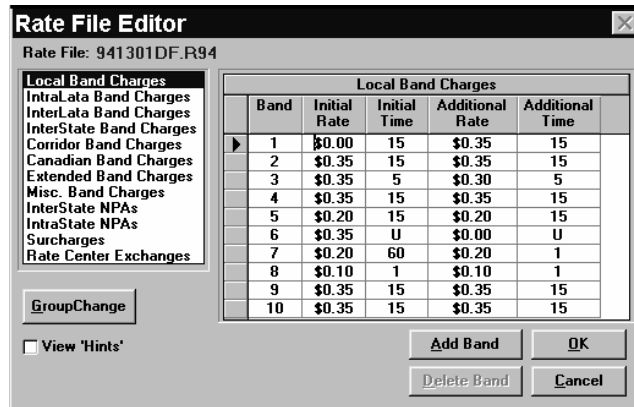
Figure 8-17

The **RATE FILE EDITOR** screen is divided into two display boxes. On the left is a list box with all the categories available in the Rate File. On the right is a grid box with the data contained within the selected category.

The next several sections describe how to edit a rate file in the following ways:

- Modify a single band charge category
- Modify a group of band charge categories
- Add a band
- Delete a band
- Add an Intra-State NPA
- Modify an Unlisted Price Band
- View the Rate Center NPA and NXX
- Modify surcharges

8.2.5 MODIFYING A SINGLE BAND CHARGE CATEGORY FOR A RATE FILE

After you create a rate file, you can modify it by changing the values of any of the Band Charge categories.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Highlight the desired rate file by selecting the box left of the file name.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	Select the desired Band Charge category from the Category list box.	
6	In the grid box, select the box to the left of the band you want to modify.	
7	Enter the new values for this band.	
8	Click on the next band you want to modify, or use the **<Tab>** key to select the adjacent cell.	**Note:** *You must move the insertion point to another cell to preserve the value changes just entered.*
9	Use the preceding steps to modify other Band Charge categories.	
10	Click on **OK**.	Saves the modifications to the rate file. Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. *Figure 8-14.*
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP-**download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 8-2*.

8.2.6 MODIFYING A GROUP OF BAND CHARGE CATEGORIES FOR RATE FILE

After you create a rate file, you can modify it by changing the values of a group of Band Charge categories at one time.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Select a rate file.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	Click on **GROUP CHANGE**.	The **CHANGE RATES** screen appears. *Figure 8-18*.

Figure 8-18

6	From the **FROM** field drop down list, select the Starting Price Band Category to be modified in the Group Change.	
7	From the **TO** field drop down list, select the Last Price Band Category to be modified in the Group Change.	The **FROM** and **TO** fields determine the range of pricing bands to be affected by the group change.
8	In the **CHANGE RATES BY** field, click on the **ADD TO EXISTING RATES** or **SET RATES TO** button.	• **ADD TO EXISTING RATES** adds the amounts in the **INITIAL** and **ADDITIONAL** boxes to the existing amounts in the pricing bands specified. • **SET RATES TO** changes the charges for the range of pricing bands to the charges specified in the **INITIAL** and **ADDITIONAL** boxes.

9	Next to the button you selected in the previous step, use the arrows in the **CHANGE RATES BY** box **INITIAL** and **ADDITIONAL** fields to select the initial and additional amounts.	
10	In the **CHANGE TIMES** by field, click on the **ADD TO EXISTING TIME** or **SET TIME TO** button.	• **ADD TO EXISTING TIME** adds the amounts in the **INITIAL** and **ADDITIONAL** boxes to the existing times in the pricing bands specified. • **SET TIME TO** changes the times for the range of pricing bands to the time specified in the **INITIAL** and **ADDITIONAL** boxes.
11	Next to the button you selected in the previous step, use the arrows in the **CHANGE TIMES BY** box **INITIAL** and **ADDITIONAL** fields to select the initial and additional time values.	To set a value to *restricted* or *unlimited*, enter a value of **99** in the **SET TIME TO** fields.
12	Click on **APPLY CHANGE.**	The values of all the Band Charge categories are changed. A dialog box appears notifying you of the number of price bands affected by the change.
13	Click on **OK**.	
14	Click on **CLOSE**.	Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. *Figure 8-14*. **Note:** *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
15	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.2.7 ADDING A BAND TO A RATE FILE

There are eight different types of bands in a rate file. PNM Plus is limited to a total of 250 bands.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Select a rate file.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	In the list box, select the Rate Band you want to add.	
6	Click on **ADD BAND**.	
7	In the new entry that appears in the table, enter the values for the initial and additional charges and time periods.	**Note:** *If the price band you add is the first price band for the price band type, you will not be able to delete this price band.*
8	Click on **OK**.	The band is added to the rate file. Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. *Figure 8-14.* **Note:** *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. Figure 8-1. See Chapter 8, Managing Payphone Configuration, for download instructions.*
9	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.2.8 DELETING A BAND FROM A RATE FILE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Select a rate file.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	In the list box, select the Rate Band containing the band you want to delete.	
6	Within the table, select the row containing the band you want to delete.	
7	Click on **DELETE BAND**.	

8	If this price band was already assigned to an NXX, select the rate band number to replace the band.	In the event the band you are deleting is currently assigned, PNM Plus enables you to select a different price band, which will be automatically substituted for the one you are deleting.
		Note: *Only user created price bands can be deleted. In addition, at least one price band will exist under the Price Band listing; you cannot delete all bands.*
9	Click on **OK**.	The band is deleted from the rate file. Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. *Figure 8-14*.
		Note: *If the modified file has already been assigned to a payphone(s), **STOP-**download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.2.9 ADDING AN INTRA-STATE NPA TO A RATE FILE

You might need to add an NPA to your rate file. For example, when there is an NPA split, you must add the new NPA to the existing NPA table by performing the following steps.

Note: *A new NPA can only use extended band or Canadian band price bands, so you must have specified at least one of these before adding an NPA.*

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Select a rate file.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	In the **RATE FILE EDITOR** screen category list box, select **INTRASTATE NPAS.**	The **SELECT INTRASTATE NPA** screen appears. *Figure 8-19.*
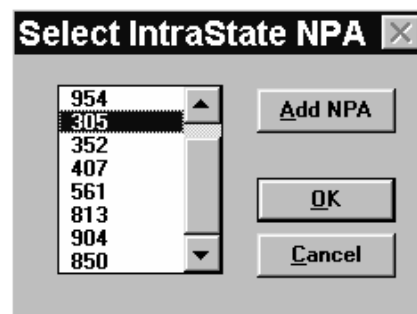
Figure 8-19

6	Click on **ADD NPA**.	The **ADD INTRASTATE NPA TO RATE FILE** screen appears. ***Figure 8-20***.
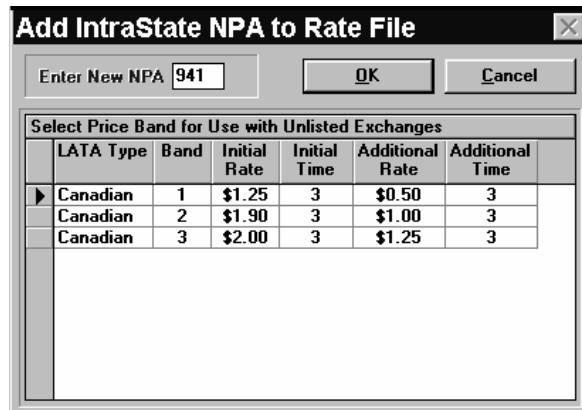
Figure 8-20

7	Enter the new NPA number in the **ENTER NEW NPA** field.	
8	Select the price band to use with unlisted exchanges.	
9	Click on **OK**.	Returns the **SELECT INTRASTATE NPA** screen with your new NPA displayed in the box.
10	Click on **OK**.	The **RATE FILE EDITOR** screen appears with a table containing price bands.
11	You need to use this **RATE FILE EDITOR** screen to specify the price band to use for calls terminating to all new exchanges under this NPA.	For example, if 952-200 is a valid NPA-NXX combination, you must specify the price band that applies. PNM Plus adds the Initial and Additional price and times to this NXX.
12	Following the example in Step 11, select the row in the price band table with the 200 exchange.	
13	Click on the drop down arrow next to the 200 exchange and select the price band that applies.	The **LATA CODE** and **PRICE BAND** fields in the Rate File Editor are populated.
14	Click on **OK**.	Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. ***Figure 8-14***. **Note:** *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
15	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1***.

8.2.10 MODIFYING THE UNLISTED PRICE BAND

From the **OPERATOR CONSOLE** screen:

|		
1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Select a rate file.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	Select **INTRASTATE NPAS** from the category list box.	The **SELECT INTRASTATE NPA** screen appears. *Figure 8-19*.
6	Select an NPA from the list and click on **OK**.	Returns the **RATE FILE EDITOR** screen with the intrastate prices for the NPA you selected.
7	Select an **UNLISTED** price band row.	
8	Click on the drop down arrow for this row and select the price band that applies.	The **LATA CODE** and **PRICE BAND** fields in the Rate File Editor are populated.
9	Click on **OK**.	Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. *Figure 8-14*.
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. Figure 8-1. See Chapter 8, Managing Payphone Configuration, for download instructions.*
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.2.11 VIEWING THE RATE CENTER NPA AND NXX

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Select a rate file.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	Select **RATE CENTER EXCHANGES** from the category list box.	The **EXCHANGES IN RATE CENTER** screen appears with the list of exchanges that can use the current rate file. *Figure 8-21*.
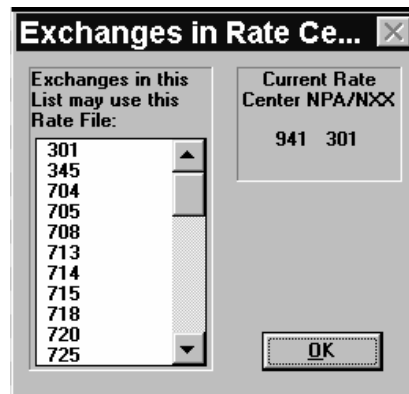
Figure 8-21

6	Click on **OK.**	Returns the **RATE FILE EDITOR** screen. *Figure 8-17*.
7	Click on **OK**.	Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. *Figure 8-14*.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.2.12 MODIFYING SURCHARGES

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **2** (Rates).	The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. *Figure 8-14*.
3	Select a rate file.	
4	Click on **EDIT**.	The **RATE FILE EDITOR** screen appears. *Figure 8-17*.
5	Select **SURCHARGES** from the category list box.	The **RATE FILE EDITOR** screen displays a table of surcharges. *Figure 8-22*.

Figure 8-22

6	Replace the Surcharge amounts for the Price Type you want to change.	
7	Click on **OK**.	Saves the new surcharge amounts. Returns the **CONFIGURATION FILES - SELECT RATE TABLE** screen. *Figure 8-10*.
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.3 Managing Rates Globally

The **Global Rate Editor** enables you to edit more than one rate file at one time (see Figure 8-23).
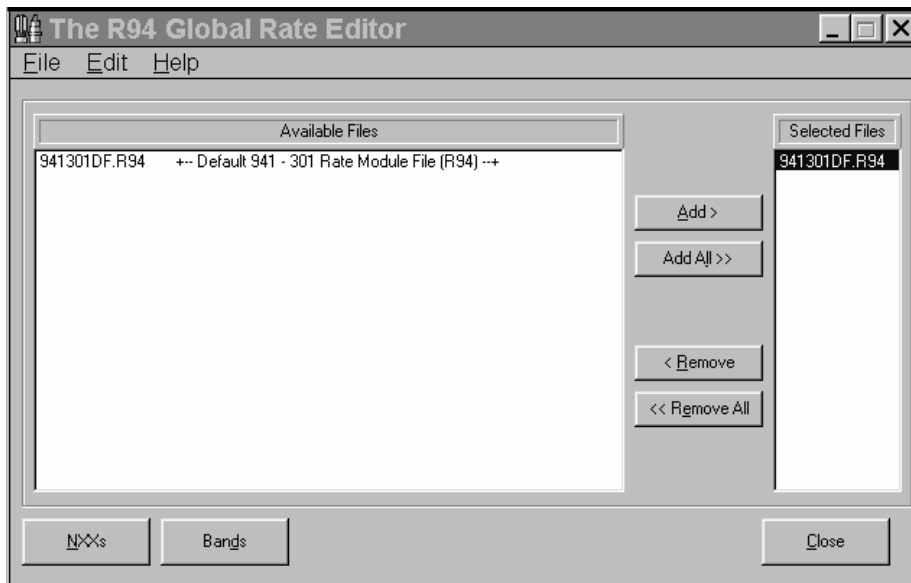
Figure 8-23

For each rate file, you can make the following changes:

- You can modify the initial and additional rate amounts and times.
- You can add NXXs to an existing NPA.

8.3.1 MODIFYING RATE AMOUNTS AND TIMES

For the rate files listed in the Global Rate Editor, you can modify the initial and additional rates and times for one or more band charge categories.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **3** (Global Rate Editor).	The **GLOBAL RATE EDITOR** screen appears. *Figure 8-24*.
3	In the **AVAILABLE FILES** window, click on a rate file you want to edit and then click on **ADD**, or double click on the rate file.	The file is copied to the **SELECTED FILES** window. You can repeat this procedure for each rate file in the **AVAILABLE FILES** window you want to edit, or you can click on **ADD ALL** to copy all the files in the **AVAILABLE FILES** window to the **SELECTED FILES** window.

4	Click on **BANDS**.	The **MODIFY PRICE AND TIME** screen appears. *Figure 8-24*.
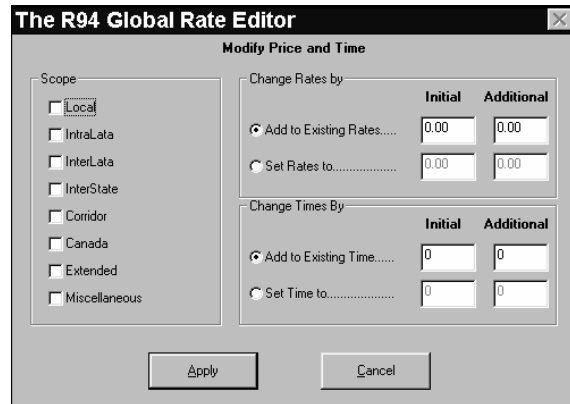
Figure 8-24

5	At the **SCOPE** window, click on the check box for each band charge category you want to modify.

6	Do one of the following at the **CHANGE RATES BY** window:	
	• To add (or subtract) initial and additional rate amounts to the existing initial and additional rate amounts, click on the **ADD TO EXISTING RATES** radio button and enter the amount you want to add to the Initial rate amount and to the Additional rate amount.	You can subtract from the existing amounts by entering a negative (-) sign before the amounts.
	• To set the initial and additional rate amounts to a specific value, click on the **SET RATES TO** radio button and enter the Initial and Additional rate amounts.	**CAUTION** If you leave the Initial or Additional rate amount at *0*, you are charging the user a rate amount of $0.00 and thus giving the user a free call. Make sure you enter a value for the Initial and Additional rate amounts.

7	Do one of the following at the **CHANGE TIMES BY** window	
	• To add (or subtract) initial and additional times to the existing initial and additional times, click on the **ADD TO EXISTING TIMES** radio button and enter the amount you want to add to the Initial time and to the Additional time.	You can subtract from the existing times by entering a negative (-) sign before the times.
	• To set the initial and additional times to a specific value, click on the **SET TIME TO** radio button and enter the Initial and Additional times.	
8	Click on **APPLY**.	The **ABOUT TO MODIFY R94S** screen displays the number of rate files and phones that will be affected by the changes you have specified.
9	Click on **CONTINUE**.	After the changes are made, the **GLOBAL RATE EDITOR** screen returns. ***Figure 8-24***.
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
		Note: *You can also click on **VIEW WARNINGS** to display any warnings that are associated with the changes.*
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1***.

8.3.2 ADDING NXXS TO AN NPA

For the rate files listed in the Global Rate Editor, you can add to an NPA an NXX that is similar to an existing, or *sister*, NXX.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. ***Figure 7-4***.
2	Click on **3** (Global Rate Editor).	The **GLOBAL RATE EDITOR** screen appears. ***Figure 8-24***.

3	In the **AVAILABLE FILES** window, click on a rate file you want to edit and then click on **ADD**, or double click on the rate file.	The file is copied to the **SELECTED FILES** window. You can repeat this procedure for each rate file in the **AVAILABLE FILES** window you want to edit, or you can click on **ADD ALL** to copy all the files in the **AVAILABLE FILES** window to the **SELECTED FILES** window.
4	Click on **NXXS**.	The **ACTIVATE NXX** screen appears. *Figure 8-25*.

Figure 8-25

5	Perform the following steps:	
	a) In the **NPA** field, enter the NPA where you want to add the NXX.	**Note:** *To delete an existing NXX file, enter UNLISTED in the SISTER NXX field and the NXX to be deleted in the NEW NXX field. This will remove any rate plans from the NXX.*
	b) In the **SISTER NXX** field, enter the existing NXX you want to use as a model for the new NXX	
	c) In the **NEW NXX** field, enter the new NXX you want to add.	The fields are added to the **NXX'S TO ADD** window.
	d) Click on **ADD TO LIST**.	After you have added rows of NPAs, sister NXXs, and new NXXs to the **NXX'S TO ADD** window, you can delete a row by selecting it and clicking on the **DELETE ROW** button. You can also delete all the rows in this window by clicking on the **CLEAR LIST** button.
6	Click on **APPLY**.	The **ABOUT TO MODIFY R94S** screen displays the number of rate files and phones that will be affected by the changes you have made.

7	Click on **CONTINUE**.	After the changes are made, the **GLOBAL RATE EDITOR** screen returns. *Figure 8-24*.
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
		Note: *You can also click on **VIEW WARNINGS** to display any warnings that are associated with the changes.*
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.3.3 DELETING NXXS FROM AN NPA

You can remove NXXs from an NPA at the **R94 GLOBAL RATE EDITOR** screen (Figure 8-25). For instructions on removing an NXX, see Section 8.3.2, *Adding NXXs to an NPA*.

8.4 Managing User-Defined Call Processing Macros

Call Macros enable you to define a series of low level commands that help process calls or perform special functions in the payphone. The Series 5/5501 payphones and KX-5502 payphones running KX 1.2 firmware or earlier permit storage of up to six user-defined macros, which are numbered 45 through 50. If your payphones have KX 1.3 firmware, you can store up to 20 user defined macros. Each macro can contain up to 26 low-level commands.

You configure user defined macros from the **EDIT PHONE MACROS** screen (see Figure 8-26). See Section 8.4.2, *Creating a User Defined Macro*, for instructions on creating user defined macros.
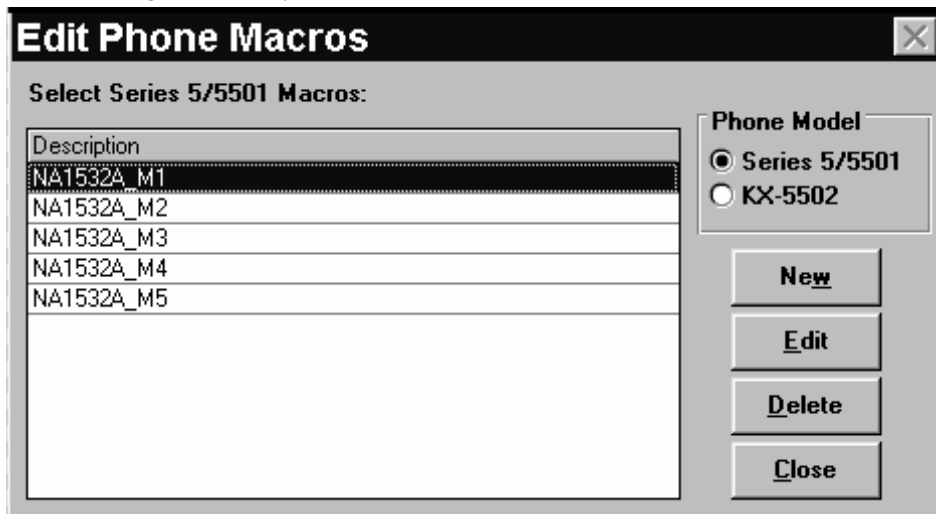
Figure 8-26

8.4.1 COMMANDS AND PARAMETERS OF A USER DEFINED CALL MACRO

Call Macros in PNM Plus consist of a Macro Description and a series of low-level commands to be performed. In addition, PNM Plus provides the ability to use Macro templates already defined for the selected phone model.   These commands are listed in the *Series 5 Operation Manual* Volume 2 (Configuration) and Volume 3 (Features Reference), or in the *KX-5502 Operation Manual* Volume 1 (Configuration) and Volume 2 (Features Reference). Macro Templates are also available for you to customize your own macro on the basis of an existing macro. The macro templates are listed in the same manuals.

8.4.2 CREATING A USER DEFINED MACRO

Although you can create as many user-defined macros as you want, you can only assign to your phones as many macros as are allowed by your phone firmware. Once a macro has been specified, you must download the Registers and Options file to your payphone and perform a Burn RAM to EEPROM command. Once created, you can use your User-Defined Macro for any of your Registers and Options templates. See Section 8.1, *Managing Registers and Options Templates*.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **4** (Macro Configuration).	The **EDIT PHONE MACROS** screen appears. *Figure 8-26*.
3	Select the phone model type for the Macro you want to create.	**Note:** *There may be differences in the low level commands available for the different phone model types*.
4	Click on **NEW**.	The **CREATE/UPDATE MACRO** screen appears. *Figure 8-27*.
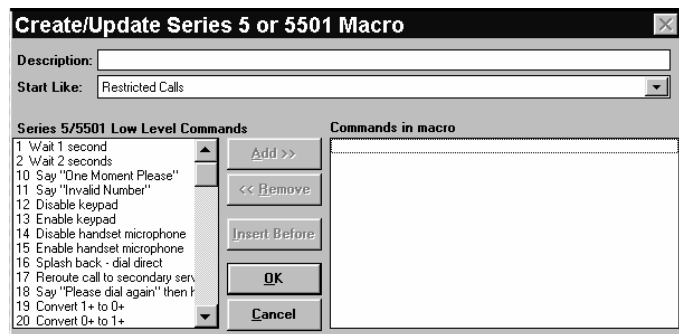
Figure 8-27

5	Enter the macro description in the **DESCRIPTION** field.	
6	Select a Macro Template from the **START LIKE** drop down list.	When you select a Start Like macro, the Low Level Commands listed in the **LOW LEVEL COMMAND SET** box are updated for the selected macro.

7	At the **LOW LEVEL COMMAND SET** box, select the command you want to include in your macro and then click on **ADD**.	
8	Repeat the previous step for each command you want in your macro.	
9	Click on **OK**.	The macro has been created. Returns the **EDIT PHONE MACROS** screen. *Figure 8-26*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.4.3 MAINTAINING A USER DEFINED MACRO

You can add or remove macro commands at the macro **CREATE/UPDATE MACRO** screen (see Figure 8-28).

8.4.3.1 Adding a Command to the User-Defined Macro

You can add a low level command after the last command in the macro by performing the following steps.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **4** (Macro Configuration).	The **EDIT PHONE MACROS** screen appears. *Figure 8-26*.
3	Select the phone model type for the Macro you want to create.	**Note:** *There may be differences in the low level commands available for the different phone model types.*
4	Select the Macro Description you want to modify.	
5	Click on **EDIT.**	The **CREATE/UPDATE MACRO** screen appears. *Figure 8-27*.
6	At the **LOW LEVEL COMMAND SET** list box, select the command you want to add to the macro.	
7	Click on **ADD**.	The command is added to the macro.
8	To insert a command between commands already in the macro, perform the following steps: • Select the command in the **COMMANDS IN MACRO** list box where you want to insert the command. • Click on **INSERT BEFORE**. • Click on the command in the **LOW LEVEL COMMAND SET** list box that you want to add. • Click on **ADD**.	The insertion point will be above the selected command. The new command is inserted above the selected command in the macro.

9	Click on **OK**.	Returns the **EDIT PHONE MACROS** screen. *Figure 8-26*.
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.4.3.2 Removing a Command from the Macro

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **4** (Macro Configuration).	The **EDIT PHONE MACROS** screen appears. *Figure 8-26*.
3	Select the macro containing the command you want to remove.	
4	Click on **EDIT.**	The **CREATE/UPDATE MACRO** screen appears. *Figure 8-27*.
5	Select the command you want to remove from the **COMMANDS IN MACRO** list box.	
6	Click on **REMOVE** or double-click on the command.	The command is removed from the macro.
7	Click on **OK**.	Returns the **EDIT PHONE MACROS** screen. *Figure 8-26*.
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.5 Managing Priority Parsing Functions

Priority Parsing is a feature that enables you to redistribute or vary the processing of calls based on the digits dialed. With Priority Parsing, you can identify the dialing pattern for each call and create user-defined pricing, macros, call types, and call completion timers. In addition, Priority Parsing enables you to determine if a dialing pattern should be rerouted or blocked.

The Priority Parsing feature can meet particular requirements, such as:

- Blocking calls

- Setting pricing for special numbers, such as 1-900 or 976

- Routing calls

- Converting digits dialed into other digits (e.g., replace an NPA when an NPA split has taken place)

- Processing calls based on specific macros

- Redialing calls

8.5.1 CONTENTS OF A PRIORITY PARSING FILE

A Priority Parsing file is a table of dialing patterns that you wish to flag for special handling. In Series 5/5501 phones and KX 1.2 or earlier phones, this table can hold a maximum of 50 entries. In KX 1.3 and later phones, the table can hold up to 250 entries. When you attempt to enter more than 50 patterns, the software reminds you of this limitation by displaying the following message:

**Warning! Only phones with firmware KX1.3.0 or later are able to
receive more than 50 records during download.**

Each entry in the Priority Parsing file has eight fields:

Field	Description
Dial Pattern	The dial pattern pulsed using the phone buttons and the digits to be out-pulsed by the Payphone to the TELCO switch. This field can hold up to 23 characters. It is formatted as follows: digits dialed, digits to be out-pulsed (incoming digits)
Macro Number	Macro ID or number identifying the low level command set to be used to process this call
Completion Timer	Time in seconds between the mic opening and coin collection
Initial Rate	Amount of dollars (in multiples of $0.05) to be charged for the Initial Rate Period
Initial Time	The amount of minutes the Initial period lasts
Additional Rate	Amount of dollars (in multiples of $0.05) to be charged for each additional time period
Additional Time	The length of time for each additional rate period
Call Type	Category of the Call (e.g., Local, Intra-LATA, Inter-LATA, FCC, Corridor, Miscellaneous, Extended, Canadian, or default (!))

8.5.2 CREATING AND EDITING A PRIORITY PARSING FILE

You create and edit a Priority Parsing file from the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen (see Figure 8-28).
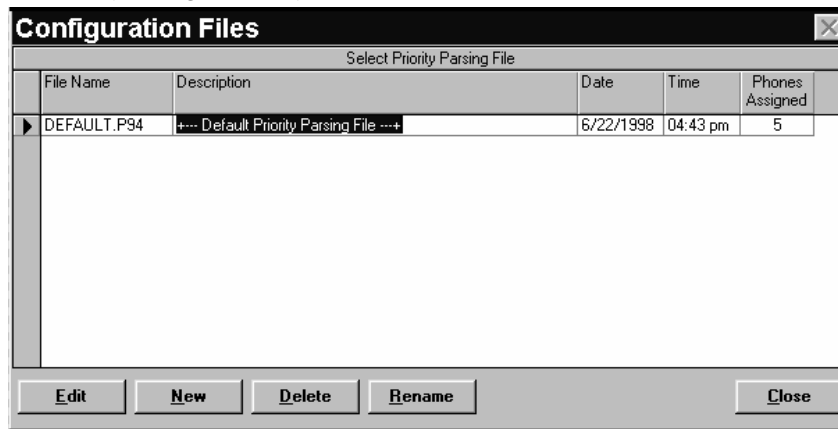
Figure 8-28

This screen contains a list of the Configuration Priority Parsing files. All Priority Parsing files are located in your current subdirectory with a P94 file extension.

Once a Priority Parsing file is entered, you can assign it to a Payphone as described in Section 4.3.7, *Assigning a Priority Parsing File*. When the Priority Parsing File is downloaded to the phone, you must also run a Burn to EEPROM command.

8.5.2.1 Creating a Priority Parsing File

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **5** (Priority Parsing).	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. *Figure 8-28*.
3	Select the file you want to use as a template.	
4	Click on **NEW**.	A prompt asks you if you want to create a file like the one selected in the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen.
5	Click on **YES**.	The **ENTER FILE INFORMATION** screen appears. *Figure 8-29*.

Figure 8-29

6	In the **ENTER A VALID FILENAME** field, enter a file name for the Priority Parsing File.	The file name can be up to eight characters. It cannot include blank spaces or ".". PNM Plus automatically adds the .P94 extension.
7	In the **ENTER DESCRIPTION** field, enter a description that provides you with information regarding the contents of the file or the use for this file.	
8	Click on **OK.**	The file appears at the end of the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen.
9	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.5.2.2 Editing a Priority Parsing File

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **5** (Priority Parsing).	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. *Figure 8-28*.
3	Select the file you want to edit.	
4	Click on **EDIT**.	The **PRIORITY PARSING EDITOR** screen appears for the selected file, where you can enter, modify, and delete data and change the order of priority parsing entries. *Figure 8-30*.
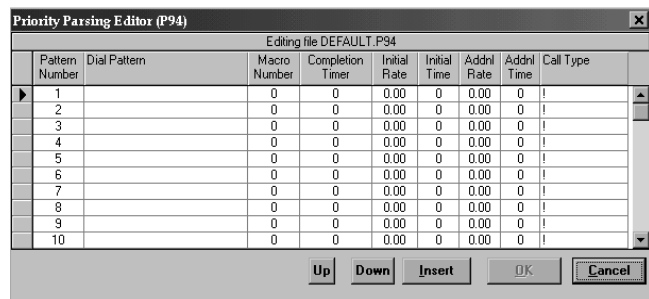
Figure 8-30

5	Modify, delete, or add to any existing data by highlighting any field and entering the new data.	See Section 8.5.3 through Section 8.5.7 for a description of each of the fields in the **PRIORITY PARSING EDITOR** screen.

6	Change the order of your priority parsing entries by using the **UP**, **DOWN**, and **INSERT** command buttons: • Click in the box to the left of the **PATTERN NUMBER** for which you wish to move or insert a new entry. • Click **UP** to move the entry up one pattern number, **or** click **DOWN** to move the entry down one pattern number, **or** click **INSERT** to move all subsequent entries down one pattern number and enter the new data for the selected pattern number.	The **UP** and **DOWN** command buttons only move an entry up or down one pattern number. If you wish to move an entry more than one pattern number, reselect the entry at its new position and click **Up** or **Down** again. Continue this process until you move the entry to the desired pattern number. Note: *When you move an entry up or down, the entry essentially switches positions with the entry directly above or below it. It does not move all entries above and below. The **INSERT** command will shift all entries at and below the insertion point down one pattern number.*
7	Once you have completed all changes and additions, click on **OK**.	Returns the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen. *Figure 8-28*. Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. Figure 8-1. See Chapter 8, Managing Payphone Configuration, for download instructions.*
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.5.3 SPECIFYING THE DIAL PATTERN

The first item you must always specify in a Priority Parsing file is the **DIAL PATTERN** to be searched. The **DIAL PATTERN** is a field containing a set of coded instructions that are separated into a two-digit sequence by a comma.

The sequence to the left of the comma represents the digits dialed by the payphone user. The sequence to the right of the comma represents the out-pulsed digits. In addition to the digits that can be normally keyed through the payphone keypad, Priority Parsing also uses special characters that cover generic entries.

The **DIAL PATTERN** field accepts digits as well as wild cards for maximum flexibility. The wild cards enable you to route calls for specific NPAs and NXXs and to block calls based on any digit dialed, even those identified by a single digit.

The following values are allowed:

1st Character:	0,1,2,3....9 (Any normal Dialed Digit)	
	@	
	$	
	*	
	?	
Next Characters:	0,1,2,3...9 (Any normal Dialed Digit)	
	@	
	*	
	?	

One Comma "," per line

Up to 23 characters per line.

The meaning of these special characters is described in the following table.

Special Character	Meaning
?	Matches any **one** digit from 0 - 9. For example, the string *950????* parses out any 7 digits dialed that start with a *950*. The string *?4075551212* parses out any digit dialed followed by *4075551212* (e.g., 14075551212).
*	Matches any number of digits. For example, the string *1900** parses out any number dialed after *1900*. The string **900* parses out any number ending with a *900*.
@	Local Area Code Dialed or Assumed. For example, *@5559808* matches *555-9808* and *(407) 555-9808*.
$	Long Distance Prefix '1' or nothing. For example, *$5559808* matches *555-9808* and *1-555-9808*. Note that *1-407-5559808* is not matched because you would need to specify *$@5559808*.
,	Separates dialed digits from out-pulsed digits.

8.5.4 SPECIFYING THE DIAL MACRO

For each dialed digit that is defined in the Priority Parsing file, you can also specify a dialing Macro to be used. If no dialing macro is specified (e.g., a *!* appears in this cell), the default Macro for this call type is used.

See Section 8.4, *Managing User-Defined Call Processing Macros*, for a detailed description of Macro definition.

8.5.5 SPECIFYING THE COMPLETION TIMER

For each entry in the Priority Parsing file, you can specify the time (in seconds) between when the mic opens and when the coins are collected. A value of *!* represents the default length for this call type.

8.5.6 CUSTOMIZING RATE PERIODS AND RATE AMOUNTS

You can also create a Priority Parsing file that specifies Initial and Additional rate periods and times that are different from the default for the call type. For instance, you can charge all calls made to Directory Assistance (411) at a $0.25 rate for an unlimited initial time period.

The Initial and Additional Rate amounts are expressed in dollars (multiples of nickels) from *$0.00* to a maximum of *$9.95*. A value of *!.!!* represents the default amount for this call type.

Note: *If you define the price as $9.95, the call is blocked and the phone returns an invalid number message.*

The Initial and Additional Time periods are expressed in minutes from *0* through *60*. In addition, rate periods can be *R* for restricted and *U* for unlimited. A value of *!* represents the default time intervals for this call type.

8.5.7 CUSTOMIZING THE CALL TYPE

You can rate the call according to the following choices:

- Local
- Intra-LATA
- Inter-LATA
- Inter-State
- Corridor
- Canadian
- Extended
- Miscellaneous

You might need to customize Call Types if NPA splits that take the place of coverage for certain exchanges (NXXs) change to include or exclude certain areas. A value of *!* results in the Call Type being set to the Default type for this call.

8.5.8 DELETING A PRIORITY PARSING FILE

After you create a Priority Parsing file, you can delete it.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. ***Figure 7-4***.
2	Click on **5** (Priority Parsing).	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. ***Figure 8-28***.
3	Select the file you want to delete.	

4	Click on **DELETE**.	If phones are assigned to this file, the following **PNM PLUS** screen appears. *Figure 8-31*.
Figure 8-31
		Click on **OK**, reassign the phones, and click on **DELETE** again.
		If phones are not assigned to this file, a prompt asks you to verify the deletion.
5	Click on **YES.**	The file is deleted from the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen.
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.5.9 RENAMING A PRIORITY PARSING FILE

After you create a Priority Parsing file, you can rename it.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **5** (Priority Parsing).	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. *Figure 8-28*.
3	Select the file you want to rename.	
4	Click on **RENAME.**	The **ENTER FILE INFORMATION** screen appears. *Figure 8-29*.
5	Enter the new File name in the **ENTER A VALID FILENAME** field.	The File name can be up to eight characters. PNM Plus automatically adds the .P94 extension.
		This function only enables you to rename the file. To modify the description of the file, you must be in the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen (see Figure 8-29) and then do the following:
		Click on the **DESCRIPTION** field next to the File you want to change.
		You can also <Tab> over to this field.
		Enter over the description.
		Press the <Tab> key to leave this cell, or click on another cell to save the description.
		When prompted to verify that the description has been changed, click on **OK**.

6	Click on **OK**.	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears with the new file name.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.5.10 MAINTAINING A PRIORITY PARSING FILE

To enter a call to be parsed in a Priority Parsing file, we will use three examples. First, we will use priority parsing to block all call made to a 950-XXXX number. Second, we will use priority parsing to translate a 411 call to a directory assistance provider. Finally, we will parse the four digits spelling TAXI (8294) into a phone number for a TAXI service.

8.5.10.1 Blocking 950xxxx Calls Example

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **5** (Priority Parsing).	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. *Figure 8-28*.
3	Select the file you want to edit.	
4	Click on **EDIT**.	The **PRIORITY PARSING EDITOR** screen appears for the selected file. *Figure 8-30*.
5	At the **DIAL PATTERN** field, enter the dialed digits as *950* followed by 4 digits with values 0-9.	This can be specified as *950????.*
6	Enter a comma to separate the dialed digits from the incoming digits.	
7	Enter the incoming digits.	In this case, there are no incoming digits.
8	Press the <TAB> key to go to the **MACRO NUMBER** column, or click on the cell below the **MACRO NUMBER** column to enter the Macro ID.	

9	To block the call, select a macro that restricts the call.	The Macro Number is *0*.

The **PRIORITY PARSING EDITOR** screen appears as follows. *Figure 8-32*.

Figure 8-32

10	Click on **OK**.	The 950 call block is saved. Returns the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen. *Figure 8-28*.
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.5.10.2 411 Example

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **5** (Priority Parsing).	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. *Figure 8-28*.
3	Select the file you want to edit.	
4	Click on **EDIT**.	The **PRIORITY PARSING EDITOR** screen appears for the selected file. *Figure 8-30*.
5	On the second Priority Parsing line, enter **411** for the dialed pattern.	
6	Enter a comma to separate the dialed pattern from the incoming digits.	
7	Enter the phone number of the site that will provide directory assistance.	
8	Press the <TAB> key to go to the **INITIAL RATE** column, or click on this cell.	
9	Enter the Initial Rate amount of **$0.25.**	
10	Press the <TAB> key to leave this cell.	

11	Specify the Initial Time Period to **U** (for Unlimited length of time).	
12	Click on **OK**.	The 411 entry is saved. Returns the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen. *Figure 8-28*.
13	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-2*.

8.5.10.3 Dial a TAXI Example

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **5** (Priority Parsing).	The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears. *Figure 8-28*.
3	Select the file you want to edit.	
4	Click on **EDIT**.	The **PRIORITY PARSING EDITOR** screen appears for the selected file. *Figure 8-30*.
5	At the **DIAL PATTERN** field, enter **8294,7808888**.	If a TAXI is dialed, the called number will be **780-8888**.
6	Press the <Tab> key to go to the **INITIAL RATE** column, or click on this cell.	
7	Enter **$0.00** to avoid charges for this call.	
8	Press the <Tab> key to go to the **INITIAL PERIOD** column, or click on this cell.	
9	Enter **5** to allow the user 5 minutes to give directions to the TAXI driver.	
10	Click on **OK**.	The Taxi entry is saved. Returns the **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen. *Figure 8-28*.
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

The following table provides additional examples of Priority Parsing:

To do this....	Dial Pattern	Macro	Completion Timer	Initial Rate	Initial Time	Add'l Rate	Add'l Time	Call Type
Re-price all 976 calls to $0.50 per minute	976????,	!	!	$ 0.50	1	$0.50	1	!
Make 980-8888 a Corri-dor Call	9808888,	!	!	!.!!	!	!.!!	!	Corridor
All 407-888-XXXX have a completion timer of 9 secs.	407888????,	!	9	!.!!	!	!.!!	!	!
Change all 407-889 calls to 407-998	$407889?, $407998?	!	!	!.!!	!	!.!!	!	!
Call Comple-tion timer for all 1-407-889-xxxx or 0-407-889-xxxx local calls to 889-xxxx dialed within 407 is 10 secs	$@889????,	!	10	!.!!	!	!.!!	!	!

8.6 Managing Speed Dial Numbers

Speed Dial numbers enable the Payphone user to quickly dial a convenience number (e.g., dial *20 for TAXI service). It also provides you with the ability to customize the phone to suit your customer's requirements of convenience. Speed Dial numbers can be accessed by dialing *[two digits] (e.g., *20). Through the use of speed dial numbers, you can specify up to 50 speed dials.

8.6.1 CONTENTS OF A SPEED DIAL FILE

The Speed Dial file contains seven fields:

- Speed Dial Number
- Called Number
- Initial Rate
- Initial Period
- Additional Rate
- Additional Period
- Call Type

The Speed Dial number represents the digits following the * button that need to be dialed to invoke a Speed Dial.

The following table contains a description of each of the Speed Dial File fields.

Speed Dial File Field	Description
Speed Dial Number	The digits following the * button that need to be dialed to invoke a Speed Dial. There are up to 50 Speed Dial Numbers, starting with 20 - 68.
Called Number	The incoming digits to be dialed by the Payphone when the Speed Dial number is dialed. The Called Number can be up to 11 digits in length.
Initial Rate	The dollar amount, in multiples of nickels ($0.05), to be charged for the initial rate period.
Initial Period	The length of time (in minutes) for the initial period.
Additional Rate	The dollar amount, in multiples of nickels ($0.05), to be charged for the additional rate period.
Additional Period	The length of time (in minutes) for each additional time period.
Call Type	The call type for this call. The call type can be Local, Intra-LATA, Inter-LATA, FCC, Corridor, Canadian, Extended, and Miscellaneous. If a value of *!* appears, the Call Type of the default call type is used.

8.6.2 CREATING AND EDITING A SPEED DIAL FILE

You create and edit a Speed Dial file from the **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen (see Figure 8-33).
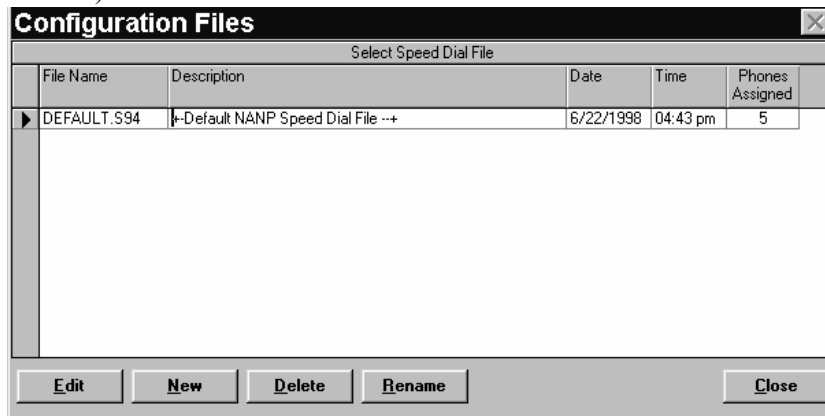
Figure 8-33

This screen contains a list of the Configuration Speed Dial files. All Speed Dial files are located in your current subdirectory with an S94 file extension.

Once a Speed Dial file is entered, you can assign it to a payphone as described in Section 4.3.8, *Assigning a Speed Dial File*. When the Speed Dial file is downloaded to the phone, you must run a Burn to EEPROM command.

8.6.2.1 Creating a Speed Dial File

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **6** (Speed Dial).	The **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen appears. *Figure 8-33*.
3	Select the file you want to use as a template.	
4	Click on **NEW**.	A prompt asks you if you want to create a file like the one selected in the **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen.
5	Click on **YES**.	The **ENTER FILE INFORMATION** screen appears. *Figure 8-34*.

Figure 8-34

6	In the **ENTER A VALID FILENAME** field, enter a Speed File name, up to eight characters in length, with no spaces or punctuation marks.	Note that PNM Plus adds the extension to the file.
7	In the **ENTER DESCRIPTION** field, enter a description that provides you with information as to the contents or function of the Speed Dial file.	
8	Click on **OK**.	The file appears at the end of the **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen.
9	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.6.2.2 Editing a Speed Dial File

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **6** (Speed Dial).	The **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen appears. *Figure 8-33*.
3	Select the file you want to edit.	
4	Click on **EDIT**.	The **SPEED DIAL EDITOR** screen appears for the selected file. *Figure 8-35*.
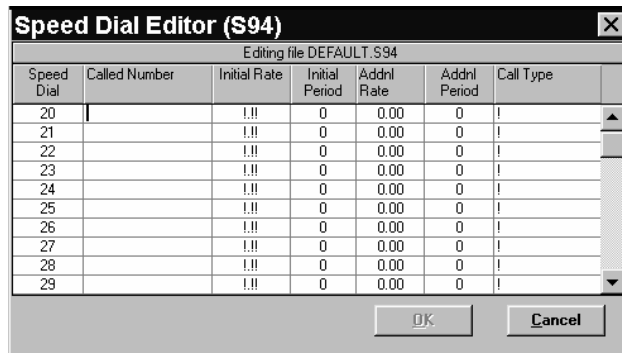
Figure 8-35

The name of the file appears below the Title Bar. The unused numbers of the Speed Dial file are blank in the **CALLED NUMBER** field and contain exclamation signs (!) in the rest of the fields. The ! signs represent default settings for that field.
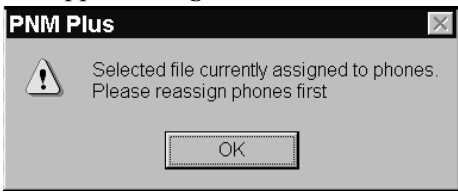
For instance, an ! sign in the **INITIAL RATE** field indicates that the rate that applies to that Call Type also applies to this Speed Dial call.

5	Select the line containing the Speed Dial number you want to define.	
6	Enter the **CALLED NUMBER**.	This is the number the Payphone dials out when a "*" and the Speed Dial digits are dialed. For example, in rural areas where there is no access to 911 service, you can specify a Speed Dial number to reach emergency service.
		To continue this example, if you want *20* to dial emergency service, do the following:
		a) Select the Line with Speed Dial 20.
		b) Tab or click with your mouse on the **CALLED NUMBER** field on that line.
		c) Enter the telephone number for the Emergency Service (e.g., 980-2200).
7	Enter the **INITIAL RATE** amount to be charged for this call.	To enter this information (e.g., 0.00), **<Tab>** over to this cell or click on the cell with your mouse.
8	Enter the **INITIAL PERIOD** of time (in minutes).	For example, enter **U** for unlimited.
9	Enter the **ADDITIONAL RATE** amount to be charged for this call.	If you entered **U** for the **INITIAL PERIOD**, you can leave the default (**0.00**) in this field.
10	Enter the **ADDITIONAL PERIOD** of time (in minutes).	If you entered **U** for the **INITIAL PERIOD**, you can leave the default (**0.00**) in this field.
11	Enter the **CALL TYPE**.	You can leave the default (**!**) in this field.
12	Click on **OK**.	Saves the speed dial file. Returns the **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen. *Figure 8-33*.
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
13	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.6.3 DELETING A SPEED DIALING FILE

After you create a Speed Dialing file, you can delete it.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **6** (Speed Dial).	The **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen appears. *Figure 8-33*.
3	Select the file you want to delete.	
4	Click on **DELETE**.	If phones are assigned to this file, the following **PNM PLUS** screen appears. *Figure 8-36.*

Figure 8-36

Click on **OK**, reassign the phones, and click on **DELETE** again. If phones are not assigned to this file, a prompt asks you to verify the deletion.

5	Click on **YES.**	The file is deleted from the **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen.
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.6.4 RENAMING A SPEED DIAL FILE

After you create a Speed Dial file, you can rename it.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **6** (Speed Dial).	The **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen appears. *Figure 8-33*.
3	Select the file you want to rename.	
4	Click on **RENAME.**	The **ENTER FILE INFORMATION** screen appears. *Figure 8-34*.

5	Enter the new File name in the **ENTER A VALID FILENAME** field.	The File name can be up to eight characters. PNM Plus adds the .S94 extension.
		This function only enables you to rename the file. To modify the description of the file, you must be in the **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen.
		Then you must do the following:
		a) Click on the **DESCRIPTION** field next to the file you want to change. You can also \<Tab> over to this field.
		b) Enter over the description.
		c) Press the \<Tab> key to leave this cell, or click on another cell to save the description.
		d) When prompted to verify that the description has been changed, click on **OK**.
6	Click on **OK**.	The **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen appears with the new file name.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.7 Managing Scrolling Message Templates

Note: *The Scrolling Messages template screen is only available for the KX-5502 model payphones.*

The KX-5502 phones have the ability to display scrolling messages while customers are using the phone. This feature creates an additional source of revenue for payphone owners, who may choose to sell scrolling advertising to local businesses.

In addition to these advertising messages, the KX-5502 phone has the ability to display instructional messages to help customers complete specific tasks.

Both types of scrolling messages are entered into a template, and the template is then assigned to the phone. The following sections describe the PNM Plus screens needed to create and edit the Messages templates used by your KX-5502 payphones.

8.7.1 CREATING A MESSAGES TEMPLATE

To create a new Messages Template, you need to start by making a copy of an existing template, and then edit the new copy to fit your needs.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **7** (Messages Editor).	The **KX-5502 SCROLLING MESSAGES TEMPLATES** screen appears. *Figure 8-37.*

Figure 8-37

3	Select the Messages Template you wish to use as your base template.	If you want to start with a blank template, select **UNASSIGNED**.
4	Click on **NEW**.	The **NEW TEMPLATE CONFIRMATION** screen appears. *Figure 8-38.*

Figure 8-38

5	Click on **YES**. Enter the name of the new template then click on **OK**.	
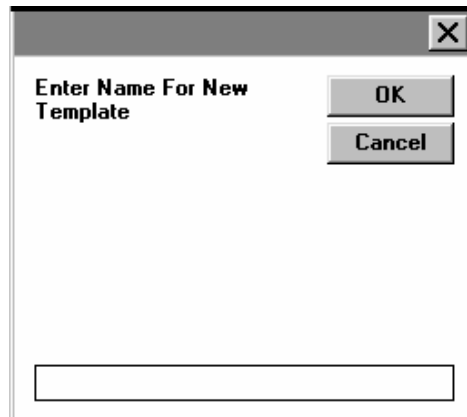
Figure 8-39

6	Enter the Description of the new template then click on **OK**.	.
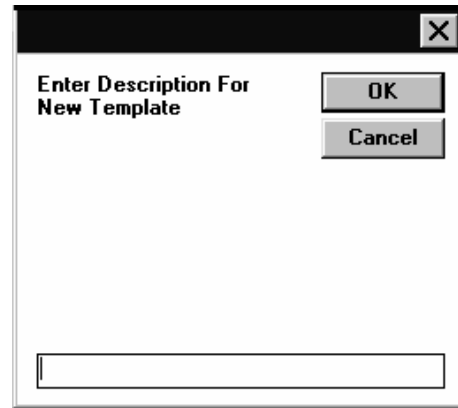
Figure 8-40

7	Proceed to Section 8.7.2, *Editing a Messages Template*, to customize your new template.	

8.7.2 EDITING A MESSAGES TEMPLATE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **7** (Messages Editor).	The **KX-5502 SCROLLING MESSAGES TEMPLATES** screen appears. *Figure 8-37.*
3	Select the Messages Template you wish to edit.	

4	Click on **EDIT**.	The **SCROLLABLE MESSAGES EDITOR** screen appears. *Figure 8-41*.
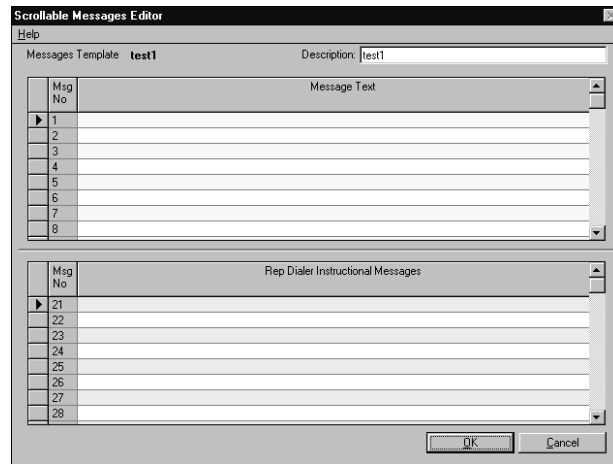
Figure 8-41

This screen consists of two panes, each of which contains 20 single-line messages; each line has an associated message number (**MSG NO.**). The top pane (Messages 1 through 20) is used for advertising messages. The bottom pane (Messages 21 through 40) is reserved for repertory dialer informational messages. The advertising messages appear in the order in which they scroll across the screen when the payphone is in use. |
| **5** | Click in the **MESSAGE TEXT** column for the line number you wish to edit; enter the text of the message to be displayed. | Each message is limited to 50 characters. If you are replacing an existing message, click and drag across the text to highlight it before you enter the new message. |
| **6** | Click in the next **MESSAGE TEXT** field you wish to edit and enter the new text. | Continue until you have finished entering or editing messages.

Note: *To delete a message, highlight the text and press the Backspace or Delete key on your keyboard. Any message number having a blank* **MESSAGE TEXT** *field is skipped when messages are being displayed.* |
| **7** | Verify that all messages are correct. | Make sure there are no spelling errors, parts of old messages that did not get erased, etc. |
| **8** | Click on **OK**. | If the modified file has not been assigned to a phone, a **MESSAGE** box appears notifying you that the update was successful.

If the modified file has been assigned to a phone, a **SAVE CONFIRMATION** dialog appears asking you if you wish to continue with the save. Click **Yes** to continue with the change or **NO** to retain the current data. |

9	Click on **OK**.	Returns to the **KX-5502 SCROLLING MESSAGES TEMPLATES** screen. *Figure 8-37*
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
10	Click on **CLOSE**.	Returns to the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.7.3 DELETING A MESSAGES TEMPLATE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **7** (Messages Editor).	The **KX-5502 SCROLLING MESSAGES TEMPLATES** screen appears. *Figure 8-42.*
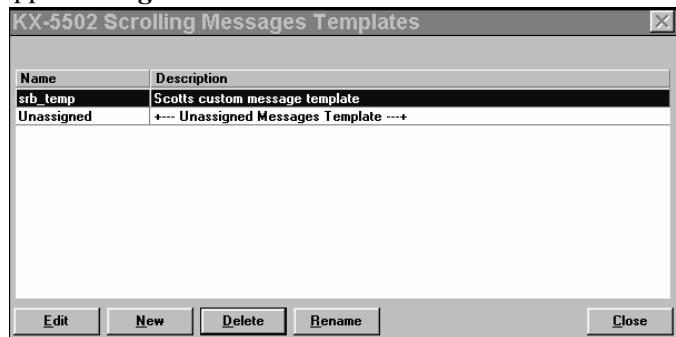
Figure 8-42

3	Select the Messages Template you wish to delete.	You may wish to view the template before deleting it, just to make sure you are deleting the correct one. See Section 8.7.2, *Editing a Messages Template*.
4	Click on **DELETE**.	The **DELETE TEMPLATE CONFIRMATION** screen appears. *Figure 8-43.*

Figure 8-43

5	Click on **YES**.	The template is deleted and you are returned to the **KX-5502 SCROLLING MESSAGES TEMPLATES** screen. *Figure 8-42*.
6	Click on **CLOSE**.	Returns to the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.7.4 RENAMING A MESSAGES TEMPLATE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **7** (Messages Editor).	The **KX-5502 SCROLLING MESSAGES TEMPLATES** screen appears. *Figure 8-42*.
3	Select the file you want to rename.	
4	Click on **RENAME**.	The **ENTER NAME FOR NEW TEMPLATE** screen appears.
5	Enter the new file name.	
6	Click on **OK**.	The **KX-5502 SCROLLING MESSAGES TEMPLATES** screen appears with the new file name.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*

8.8 Managing Repertory Dialer & Credit/Debit Card Templates

Note: *The Rep/Cards Template screen is only available for the KX-5502 model payphones.*

The KX-5502 phones feature a repertory dialer of 9 or 12 buttons (depending on housing selected) which can be programmed to activate special phone features. These features may include Complete Call, Add Prefix, Push to Talk, Volume Control, Language Toggle, Busy Redial, or New Call. You may also use these buttons for speed dial to Police, Ambulance, Taxi, or Towing Service.

The KX-5502 phone also features a card reader for credit cards and debit cards. The phone can be programmed to accept and reject certain credit card numbers. You can also program the phone to accept/reject a sequence or batch of debit cards, as well as limit the maximum value of the cards to avoid fraudulent use of your payphones.

The following sections describe the PNM Plus screens needed to create and edit the Rep/Cards templates used by your KX-5502 payphones.

8.8.1 CREATING A REP/CARDS TEMPLATE

To create a new Rep/Cards Template, you need to start by making a copy of an existing template, and then edit the new copy to fit your needs.

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **8** (Rep/Cards Editor).	The **REP/CARDS TEMPLATE** screen appears. *Figure 8-44.*
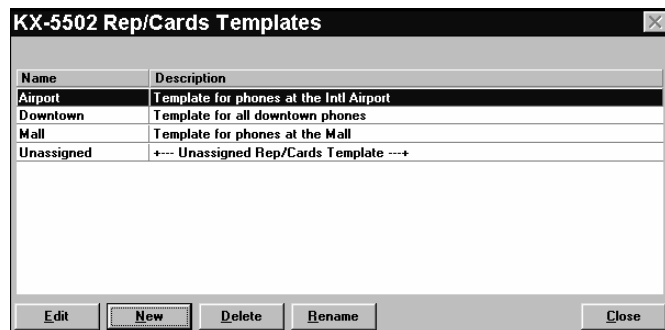
Figure 8-44

3	Select the Rep/Cards Template you wish to use as your base template.	

4	Click on **NEW**.	The **NEW TEMPLATE CONFIRMATION** screen appears. *Figure 8-45.*

Figure 8-45

5	Click on **YES**. Enter the name of the new template then click on **OK**.	*Figure 8-46*.
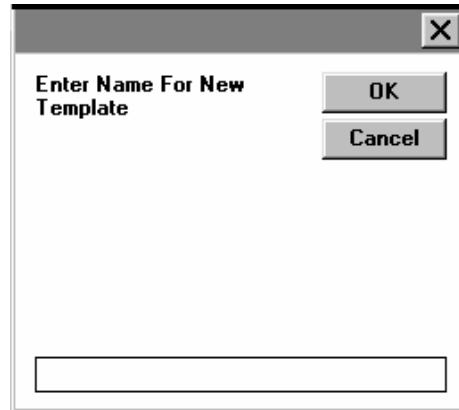
Figure 8-46

6	Enter the Description of the new template then click on **OK**.	*Figure 8-47*.
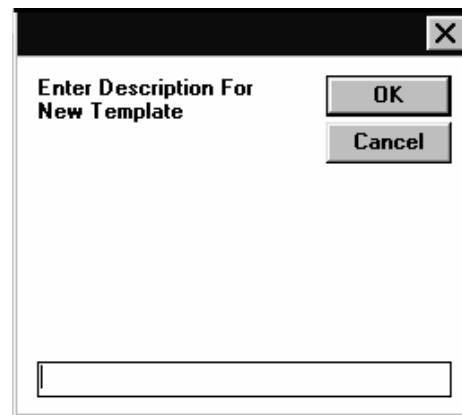
Figure 8-47

7	Proceed to Section 8.8.2, *Editing the Repertory Dialer Table*, Section 8.8.3, *Editing the Credit Card Table*, or Section 8.8.4, *Editing the Debit Card Table* to customize your new template.	

8.8.2 EDITING THE REPERTORY DIALER TABLE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **8** (Rep/Cards Editor).	The **REP/CARDS TEMPLATE** screen appears. *Figure 8-44.*
3	Select the Rep/Cards Template you wish to edit.	
4	Click on **EDIT**. The Repertory Dialer tab is selected on default.	The **KX-5502 REP/CARDS EDITOR** screen appears with the Repertory Dialer tab in front. *Figure 8-48*.

Figure 8-48

5	View the numbers from 1-12 in the column on the right under **KEY.**	This is the Key number or the number of the button on your KX-5502 model payphone associated with the commands on this row.
		Note: *Depending on your phone model type (Western or Quadrum), you may have 9 or 12 repertory dialer buttons on the payphone. If the payphone only has 9 buttons, key numbers 10, 11, and 12 will be unused.*

6	Using the Drop-Down Box in the **ID** column, select the principle use for this key. Activate the Drop-Down box by clicking in the far right of the **ID** field box for the desired Key number.	The **ID** field shows the type of repertory dialer action the phone takes when the corresponding number key is pressed by the user. Valid actions include:
		Not Used: The key is not used for any special function.
		Prefix: The pattern is a prefix the phone adds to the dial string entered by the user.
		Complete: The pattern is the complete destination number.
		Volume Control: This changes the payphone handset volume each time the user presses the key.
		New Call: The payphone goes onhook and then offhook.
		Busy Redial: The payphone outdials the last number.
		Language Toggle: Changes the language of the payphone voice prompt.
		Push to Talk: Opens the handset microphone.
		To use this key as a speed dial button, select **COMPLETE** and continue with step 7.
		If you want to use this key for one of the other listed options, click on the selection and go to the next key. No other columns on this row need to be edited.
7	Under the **PATTERN** column, enter the number to be dialed.	The **PATTERN** field can include digits 0 - 9, #, ?, and *. This field is limited to 23 digits.
8	Select a **DIALING MACRO** from the drop down list. Activate the drop down list by clicking in the far right of the **DIALING MACRO** field box for the desired Key number.	The dialing macro assigned to the pattern tells your payphone how to dial specific call types. Refer to your payphone operation manual for more details.
9	Enter a time in seconds under the **CCT** column.	The **CALL COMPLETION TIMER** designates the number of seconds that must expire after answer detect for a call to be complete and billable. After the designated amount of time entered in this field, the phone will collect payment.
10	Enter the **INITIAL RATE** and **INITIAL TIME** for the call in the proper columns.	The **INITIAL RATE** is the dollar amount, in multiples of $0.05, to be charged for the initial period. The **INITIAL PERIOD** is the length of time (in minutes) for the initial period.
11	Enter the **ADDITIONAL RATE** and **ADDITIONAL TIME** for the call in the proper columns.	The **ADDITIONAL RATE** is the dollar amount, in multiples of $0.05, to be charged for the additional period. The **ADDITIONAL PERIOD** is the length of time (in minutes) for the additional time period.
12	Select a **LATA** from the drop down box.	**LATA** is a calling area that reflects common social and economic communities of interest and does not necessarily correspond with NXX, NPA, or political boundaries.

13	From the drop down list, select the number of the first instructional message associated with the current key in the **MSG START** field.	You can activate the drop down list by clicking in the far right of the **MSG START** field box for the desired Key number.
14	From the drop down list, select the number of the last instructional message for this key in the **MSG STOP** field.	You can activate the drop down list by clicking in the far right of the **MSG STOP** field box for the desired Key number.
15	Click on **OK**.	If the modified file has not been assigned to a phone, a **MESSAGE** box appears notifying you that the update was successful.
		If the modified file has been assigned to a phone, a **SAVE CONFIRMATION** dialog appears asking you if you wish to continue with the save. Click **Yes** to continue with the change or **NO** to retain the current data.
16	Click on **OK**.	Returns to the **REP/CARDS TEMPLATE** screen. *Figure 8-44*
		Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. Figure 8-1. See Chapter 8, Managing Payphone Configuration, for download instructions.*
17	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.8.3 EDITING THE CREDIT CARD TABLE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **8** (Rep/Cards Editor).	The **REP/CARDS TEMPLATE** screen appears. *Figure 8-44.*
3	Select the Rep/Cards Template you wish to edit.	
4	Click on **EDIT**.	The **KX-5502 REP/CARDS EDITOR** screen appears with the Repertory Dialer tab in front. *Figure 8-47*.

5	Click on the **CREDIT CARDS** tab.	The **KX-5502 REP/CARDS EDITOR** screen appears with the Credit Card tab in front. *Figure 8-49.*
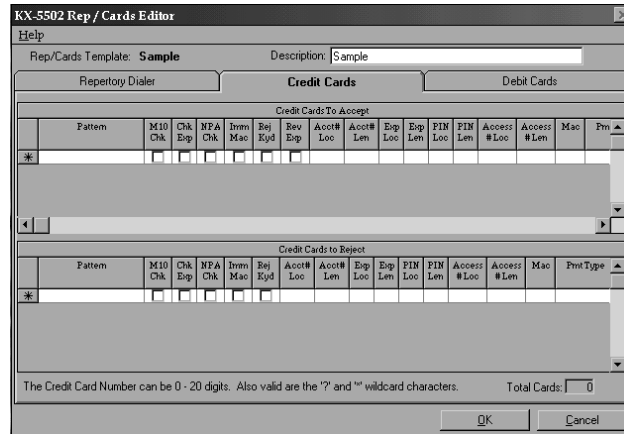
Figure 8-49

> **Note:** *The entries for cards to accept and cards to reject are the same, with the exception of the REV EXP check box. A combined total of fifty lines of accept/reject information is permitted.*

6	In the top half of this screen, enter the credit card number **PATTERN** to accept.	**Note:** *If there are no entries in this column, the payphone will not accept any credit cards.* Each row is limited to 20 digits. You may use the following wildcards: ? = any one digit * = any following digits
7	Check the box under **M10 CHK**, if you wish this to be performed.	If the **M10** box is checked, the phone performs a mathematical algorithm on the card number, known as modulo ten, that gives a high degree of assurance that the card is legitimate.
8	Check the box under **CHK EXP**, if you want the expiration date to be checked.	
9	Check the box under **NPA CHK**, if you wish this to be performed.	**CHECK NPA** only applies to calling cards. When checked, the phone checks the area code on the calling card.
10	Check the box under **IMMED MACRO**, if you wish this to be performed.	Check the **IMMED MACRO** box if you want the phone to immediately run the assigned macro when it reads a given pattern from a card. This option also instructs the phone to pick up the Access Number from the credit card magnetic stripe when a number is entered in the **ACCESS # LOC** field.
11	Check the box under **REJ KYD**, if you wish this to be performed.	Check the **REJ KYD** box if you want the phone to reject all cards that are keyed into the keypad instead of read by the card reader.

12	Check the box under **REV EXP** if you wish this to be performed.	This option is for KX 1.3 phones only. The **REV EXP** box should be checked if your OSP requires YYMM format.
13	Enter the location of the account number in the **ACCT# LOC** field.	A number entered into this field instructs the phone where to find the account number when it reads a magnetic stripe. You will enter a zero (0) in this field for credit cards since the first digit on the magnetic stripe begins the account number.
		Note: *The phone begins counting at zero (0), not 1, and it does include spaces when counting.*
		Calling cards may vary as to the number you enter in this field. For example, if the card pattern is 34567**** and the account number begins with 5, you would enter a 2 in the **ACCT # LOC** field.
14	Enter the length of the account number in the **ACCT# LEN** field.	This field is required for all credit card patterns entered or the phone will not accept the cards. Credit card account numbers are 16 digits in length.
15	Enter the location of the expiration date in the **EXP LOC** field.	A number entered in this field instructs the phone where to find the expiration date location on a credit card magnetic stripe. Since the expiration date follows the account number, enter 17 in this field. If you have checked the **CHK EXP** box, this field is required.
16	Enter the length of the expiration date in the **EXP LEN** field.	Credit card expiration dates are 4 digits in length. This field is required if you have entered a number in the **EXP LOC** field.
17	Enter the location of the account holder's personal identification number in the **PIN LOC** field.	The **PIN LOC** field is typically for calling cards. The PIN number is usually located in the last four spaces of the calling card pattern: *XXX XXX XXXX PIN#.*
		This field is not required.
18	Enter the length of the account holder's personal identification number in the **PIN LEN** field.	PIN numbers are typically four numbers in length. This field is only required if you have entered a number in the **PIN LOC** field.
19	Enter the location of the access number in the **ACCESS # LOC** field.	Enter a number in this field to instruct the phone where to find the access number location on the magnetic stripe. This field is not required.
20	Enter the length of the access number in the **ACCESS # LEN** field.	This field is only required if you have entered a number in the **ACCESS # LOC** field.
21	Enter any appropriate Macros associated with this credit card pattern in the **MACRO** field	

22	Select a payment type from the **PAYMENT TYPE** drop down list.	You have three choices of **PAYMENT TYPES**: • **BELL CARDS** - calling cards • **COMMERCIAL** - credit cards • **UNKNOWN**
23	Repeat Steps 6 through 22 for any additional patterns you wish to enter.	
24	In the bottom half of the screen, repeat steps 6 through 22 to enter any credit card numbers you wish the phone to reject.	**Note:** *The same wild cards are allowed as in the "Credit Cards to Accept" section.* **Note:** *DEBIT CARD TO REJECT fields do not include the REV EXP check box.*
25	Click on **OK**.	If the modified file has not been assigned to a phone, a **MESSAGE** box appears notifying you that the update was successful. If the modified file has been assigned to a phone, a **SAVE CONFIRMATION** dialog appears asking you if you wish to continue with the save. Click **YES** to continue with the change or **NO** to retain the current data.
26	Click on **OK**.	Returns to the **REP/CARDS TEMPLATE** screen. *Figure 8-44.* **Note:** *If the modified file has already been assigned to a payphone(s), the STOP-download warning screen appears. Figure 8-1. See Chapter 8, Managing Payphone Configuration, for download instructions.*
27	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.8.4 EDITING THE DEBIT CARD TABLE

From the **OPERATOR CONSOLE** screen:

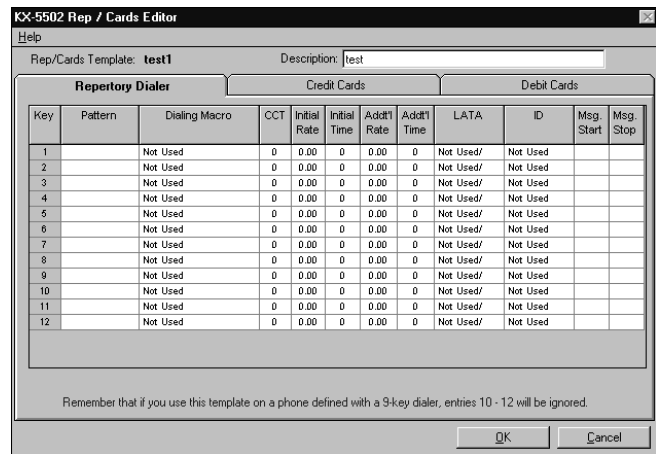|		
1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **8** (Rep/Cards Editor).	The **REP/CARDS TEMPLATE** screen appears. *Figure 8-44.*
3	Select the Rep/Cards Template you wish to edit.	
4	Click on **EDIT**. The Repertory Dialer tab is selected on default.	The **KX-5502 REP/CARDS EDITOR** screen appears with the Repertory Dialer tab in front. *Figure 8-49*.
5	Click on the **DEBIT CARDS** tab.	The **KX-5502 REP/CARDS EDITOR** screen appears with the Debit Card tab in front. *Figure 8-50.*
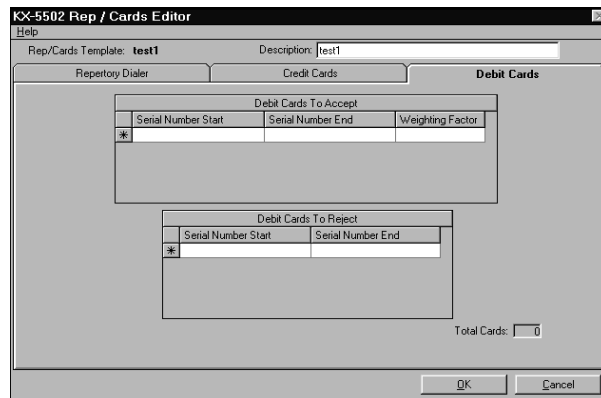
Figure 8-50

Serial Number Start and **Serial Number End** may be used to reject a batch of cards that have been stolen, or to enable debit cards only after they have been sold.

6	Enter the debit card numbers to accept.	The section on top is used for debit card numbers to be approved.
		• If there are no entries in this section, the payphone will not accept any debit cards.
		• You may use the following wildcards:
		? = any one digit
		* = any following digits
		• A combined total of fifty lines of accept/reject information is permitted.
7	Enter the Weighting Factor for each debit card to accept.	**Weighting Factor** specifies the multiplier to be used in calculating the value of a debit card. (It also determines the rate at which the card is debited when a call is made.) Several different weighting factors are used, so we recommend that you contact the particular card manufacturer to get this information before you enable the card. The value should be between 1 and 16.

8	Enter the debit card numbers to reject.	The section on the bottom is used for debit card numbers to be disapproved. You may use the following wildcards:
		
		  ? = any one digit
		
		  * = any following digits
		
		• A combined total of fifty lines of accept/reject information is permitted.

9	Click on **OK**.	If the modified file has not been assigned to a phone, a **MESSAGE** box appears notifying you that the update was successful. If the modified file has been assigned to a phone, a **SAVE CONFIRMATION** dialog appears asking you if you wish to continue with the save. Click **YES** to continue with the change or **NO** to retain the current data.
10	Click on **OK**.	Returns the **REP/CARDS TEMPLATE** screen. ***Figure 8-44.*** Note: *If the modified file has already been assigned to a payphone(s), the **STOP**-download warning screen appears. **Figure 8-1**. See Chapter 8, Managing Payphone Configuration, for download instructions.*
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1***.

8.8.5 DELETING A REP/CARDS TEMPLATE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. ***Figure 7-4***.
2	Click on **8** (Rep/Cards Editor).	The **REP/CARDS TEMPLATE** screen appears. ***Figure 8-44***.
3	Select the Rep/Cards template you want to delete.	
4	Click on **DELETE**.	A **MESSAGE** box will appear prompting you to verify the deletion.
5	Click on **YES**.	
6	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. ***Figure 3-1***.

8.8.6 RENAMING A REP/CARDS TEMPLATE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **8** (Rep/Cards Editor).	The **REP/CARDS TEMPLATE** screen appears. *Figure 8-44*.
3	Select the Rep/Cards template you want to rename.	
4	Click on **RENAME**.	
5	Enter a new template name.	
6	Click on **OK**.	
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.9 Applying Changes to Groups of Phones

In the previous sections you learned how to create and modify the operational files that Elcotel's phones use. In addition, you learned through the Payphone Administration function how to assign operational files to individual phones. In this section, you will learn how to make changes to the operational file assignments and to the registers and options settings for a specified group of phones.

The Configuration Global Change function enables you to select and modify a group of phones' operational file assignments. The phone selection is based on the phones' operational file assignments, registers and options values, or specific phone information (e.g., range of NPA-NXX).

The modification can modify the current contents of your operational files. In addition, you can manage the download of these changes by creating a poll list or by updating the next contact list of commands for the affected phones.

Through the **GLOBAL PHONE CHANGES** screen (see Figure 8-51), you can easily manage changes that affect a group of phones:

- In a specified site, exchange, route, customer, city, or state.
- Using a particular Registers and Options Base Template.
- Containing specific Registers and Options values. (For example, you can modify the *call home* number for a range of phones containing a call home number equal to a value.)
- Having a particular Password or Bypass Code.
- Using a given Priority Parsing, Speed Dial, Program, Message, Rep/Card, Language or Rates file.
- Of a specified model type.
- With certain Seal Numbers, Key Numbers, or User Variables.

.
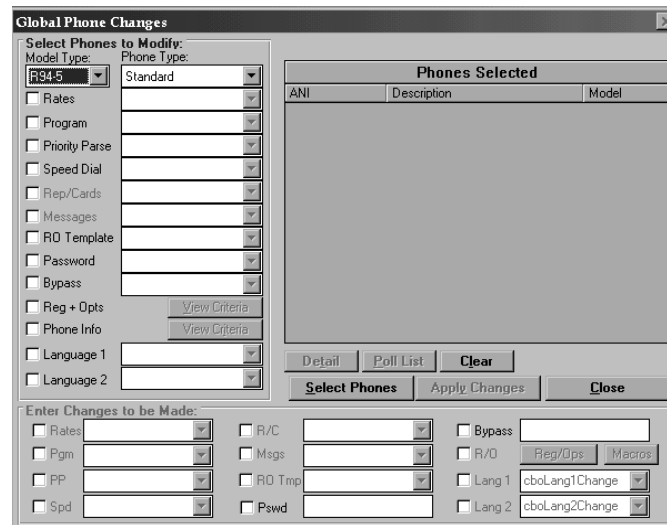
Figure 8-51

The following sections show you how to make changes to a group of phones. This procedure is divided into the following steps:

- Selecting the search criteria.

- Displaying the phones that match the search criteria.

- Creating a poll list.

- Choosing the changes to be made.

8.9.1 SELECTING SEARCH CRITERIA

The top left quadrant of the **GLOBAL PHONE CHANGES** screen displays the possible selection criteria you can use to search phones in the database. The lower left quadrant displays the possible changes that can be made to the phones you selected. On the right is the list of the selected phones that match the search criteria.

The global change you make affects all phones that are selected. The phone selection is performed by searching the phone database against the chosen criteria. The selection criteria include Model Type, Rates file, the Program file, the Priority Parsing file, the Speed Dial file, Rep/Cards file, Scrolling Message file, RO (Base) Template file, Password, Bypass Code, Registers and Options values, Phone Information, and Language files.

The Model Type selection limits the other fields from being available. If the Model Type selected is a Series 5/5501 line of phone, the Rep/Cards and Messages fields are not available because these phones do not support those functions.

The Registers and Options search criterion enables you to select up to five Registers or Options settings that all selected phones must meet. Unlike the rest of the operational files, the Registers and Options settings can vary from phone to phone. As a result, there is no single file that can be modified that will affect a group of phones. This design enables you to tailor each phone to suit specific site, exchange, and customer needs.

If multiple criteria are selected, the logical *AND* of the selection is performed. For instance, if the Rates and Speed Dial files are used to search the phones in the database, the phone selection matches the specified Rate and Speed Dial files.

To select a file as a search criterion

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **9** (Global Change).	The **GLOBAL PHONE CHANGES** screen appears. *Figure 8-51*.
3	Select a phone model from the **MODEL TYPE** drop down list.	Any file type not available to the selected phone model will become inactive.
4	Activate the search criterion or criteria by clicking on the check box to the left of its description.	
5	From the drop down list, select the filename to search.	To see the phones that match the criteria you selected, go to Section 8.9.2, *Viewing the List of Selected Phones*.

To select registers and options as a search criterion

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **9** (Global Change).	The **GLOBAL PHONE CHANGES** screen appears. *Figure 8-51*.
3	Select a phone model from the **MODEL TYPE** drop down list.	
4	Click on the check box to the left of **REGISTER + OPTIONS**.	
5	Click on **VIEW CRITERIA**.	The **SET SELECTED REGISTERS AND OPTIONS VALUES** screen appears. *Figure 8-52*.

Figure 8-52

6	Select the Category Title under which the Register or Option you want to use as a search criteria is grouped.	
7	Select the Register or Option in the **SELECT DESIRED REGISTER** list box that you want to use as the selection criteria.	
8	Double click on the selection or click on **CHOOSE**.	The selected Register or Option appears in the box at the bottom of the screen.
9	Click on the down arrow in the **EQUALS** column.	The values currently stored in the database for the selected Register or Option appear in a drop down list.
10	Select the value from the list that you want to use as your search criterion.	The value appears in the **EQUALS** column.
11	Click on **OK**.	Returns the **GLOBAL PHONE CHANGES** screen. *Figure 8-51*. To see the phones that match the criteria you selected, go to Section 8.9.2, *Viewing the List of Selected Phones*.

To select phone information as a search criterion

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. *Figure 7-4*.
2	Click on **9** (Global Change).	The **GLOBAL PHONE CHANGES** screen appears. *Figure 8-51*.
3	Select a phone model from the **MODEL TYPE** drop down list.	
4	Click on the check box to the left of **PHONE INFORMATION**.	

5	Click on **VIEW CRITERIA**.	The **SELECT PHONES BY PHONE INFORMATION** screen appears. ***Figure 8-53***.

Figure 8-53

6	Select the fields you want to use as search criteria by clicking on the check box to the left of the fields.	
7	For each field you selected, enter a value you want to search for or, if available, select a value from the field drop down list.	
8	Click on **OK.**	Returns the **GLOBAL PHONE CHANGES** screen. ***Figure 8-51***. To see the phones that match the criteria you selected, go to Section 8.9.2, *Viewing the List of Selected Phones*.

8.9.2 VIEWING THE LIST OF SELECTED PHONES

To view the list of selected phones, you must first determine your search criteria. For illustration purposes, let's define the search criteria to be RO Template equal to FACTRYDEF and Phone Information set for ANI's with NPA's from 400 to 999.

1	After you select the search criteria (see Section 8.9.1, *Selecting Search Criteria*), click on **SELECT PHONES.**	The phones in the database that match the criteria appear in the **PHONES SELECTED** list box*. **Figure 8-54**.
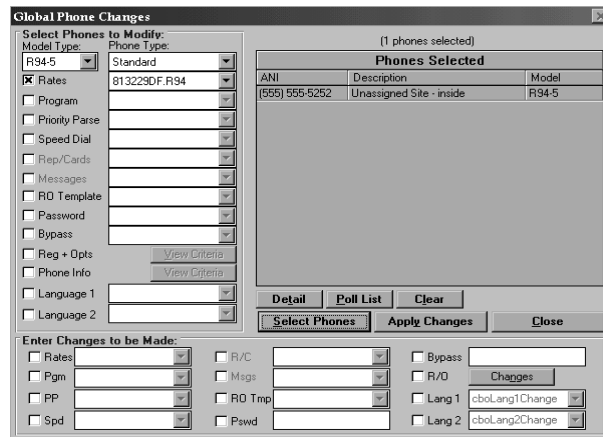
Figure 8-54

Note: *A **MESSAGE** dialog box appears if no phones were found with the selected criteria. Click **OK** to return to the **GLOBAL PHONE CHANGES** screen.*

Note: *You can clear the selected phone list by clicking on **CLEAR***

2	To view the phone detail information for any of the phones selected, highlight the desired phone and click on **DETAIL**.	The **PHONE DETAIL** screen displays the phone information. **Figure 4-7**.

8.9.3 CREATING A POLL LIST AT THE GLOBAL PHONE CHANGES SCREEN

Although you are advised to update polled phones during the next contact if you poll your phones on a regular basis, you also can create a One Time poll list that will download the new file or new Registers and Options information to the phones selected. Perform the following steps to create a poll list.

1	After you have displayed a list of phones that matches your search criteria (see Section 8.9.2, *Viewing the List of Selected Phones*), click on **POLL LIST**.	The **ADD TO POLL LIST** screen appears. *Figure 8-55.* *Figure 8-55*
2	Click on **MAKE NEW LIST**.	The **ENTER NEW POLL LIST INFORMATION** screen appears. *Figure 8-56*. *Figure 8-56* **Note:** *At the **ADD TO POLL LIST** screen, you can select an existing poll list (instead of creating a new one) and then click on **ADD TO LIST** if you already have a poll list that fits your needs.*
3	Enter the name of the new poll list in the **ENTER POLL LIST NAME** field.	
4	Select the **ONE-TIME** button.	
5	Click on **OK**.	The **POLL SCHEDULE** screen appears. *Figure 4-9*.
6	Select the week day, day of the month, and start time for your poll list.	
8	Click on **OK**.	The **POLL LIST COMMANDS** screen appears. *Figure 4-10*.
9	Select the commands you want to download and clear the rest of the commands.	At a minimum, the command set must include the download of the operational (and program) file and the Burn RAM Image to EEPROM command.
10	Click on **OK**.	Returns the **GLOBAL PHONE CHANGES** screen*. Figure 8-51*.
11	Click on **POLL LIST**.	Returns the **ADD TO POLL LIST** screen. *Figure 8-55*.
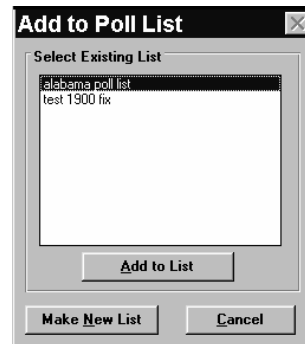
12	Select the poll list you created.	
13	Click on **ADD TO LIST**.	The poll list is saved. Returns the **GLOBAL PHONE CHANGES** screen. *Figure 8-54*.
14	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.9.4 CHOOSING THE CHANGES TO BE MADE

Once you have the phones you want to change displayed in the **GLOBAL PHONE CHANGES** screen (see Section 8.9.2, *Viewing the List of Selected Phones*), you can make changes to the files (i.e., rates files, program files, priority parsing files, speed dial files, R/O template files, language files, and registers and options) associated with those phones. The following sections describe how to globally change operational and rate files, register and option values and settings, and user defined macros.

8.9.4.1 Changing Files Associated with a Group of Payphones

The following steps apply to all files *except* Register and Options and User Defined Macros. Refer to Section 8.9.4.2, *Changing the Register and Option Settings of Payphones*, to change Register and Options settings and Section 8.9.4.3, *Changing User Defined Macros for Payphones*, to edit user defined macros.

Note: *The **R/O TEMPLATE** field allows you to change the template of registers and option assigned to your payphones. The **REG + OPS** button allows you to change actual register values and option settings.*

1	Display a list of phones that matches your search criteria (see Section 8.9.2, *Viewing the List of Selected Phones*).	
2	Select the files to be changed by clicking to the left of the desired file type in the **ENTER CHANGES TO BE MADE** window and then make the changes.	For instance, if the Priority Parsing file for these phones needs to be changed, select the **PRIORITY PARSING** file and then select the name from the drop down list. If the changes to be applied include setting a new R/O (Base) Template, The selected phones will have all Registers and Options set like the new Base Template.
3	Click on **APPLY CHANGES**.	A **MESSAGE** box appears notifying you of the number of phones about to change and whether you are sure you want to make the changes.
4	Click on **YES** to make the desired changes **or** Click on **NO** to keep the current phone settings.	If you have made changes, the **STOP -** download warning screen appears. *Figure 8-1*. See Chapter 8, *Managing Payphone Configuration* for download instructions.
5	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.9.4.2 Changing the Register and Option Settings of Payphones

1	After you have displayed a list of phones that matches your search criteria (see Section 8.9.2, *Viewing the List of Selected Phones*), click on the **R/O** check box in the **ENTER CHANGES TO BE MADE** window.	
2	Click on **REG/OPS**.	The **CHANGE REGISTERS AND OPTIONS VALUES** screen appears. *Figure 8-57*. *Figure 8-57*
3	Select the Category Title under which the Register or Option you want to change is grouped.	
4	In the **SELECT DESIRED REGISTER** list box, select the Register or Option that you want to change.	
5	Double click on the selection or click on **CHOOSE**.	The selected Register or Option appears in the box at the bottom of the screen.
6	In the column labeled **SET TO VALUE**, enter the new value of the register or turn the option on or off.	The value range for the selected register appears in the box above the **SET TO VALUE** field. If an option has been selected, **SPACEBAR SETS ON/OFF** appears in this box.
7	Click on **OK.**	A **MESSAGE** box appears notifying you of the number of phones about to be changed.
8	Click on **YES** if you want to proceed with the change(s), **or** Click on **NO** to maintain the current phone settings.	Returns the **GLOBAL PHONE CHANGES** screen. *Figure 8-54*.
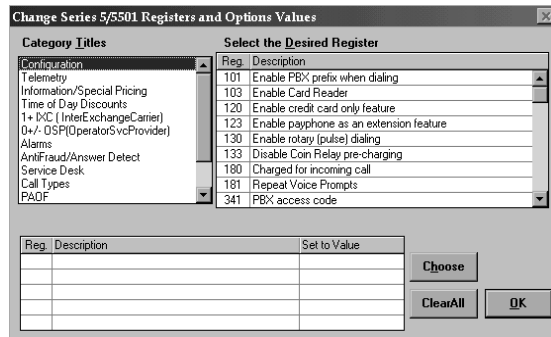
9	Click on **APPLY CHANGES**.	This command updates the database and changes all the file assignments to those specified.
		The **STOP** - download warning screen appears. *Figure 8-1*. See Chapter 8, *Managing Payphone Configuration*, for download instructions.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.9.4.3 Changing User Defined Macros for Payphones

| **1** | After you have displayed a list of phones that matches your search criteria (see Section 8.9.2, *Viewing the List of Selected Phones*), click on the **R/O** check box in the **ENTER CHANGES TO BE MADE** window to change the settings of current user defined macros. | |
| **2** | Click on **MACROS**. | The **GLOBAL CHANGE - MACRO** screen appears. *Figure 8-58.* |
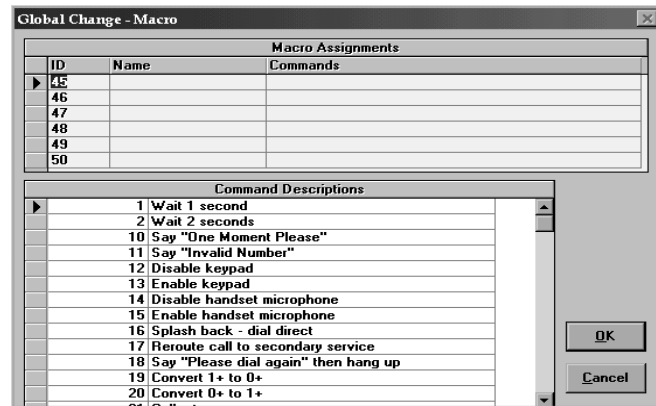
Figure 8-58

| **3** | Click on one of the numbered lines on the top section of the screen. | **Note:** | *These are labeled 45-50 for Series 5/5501 phones, and KX phones running 1.2 firmware or earlier, or 45-64 for KX phones running 1.3 firmware.* |

4	Click in the far right portion of the **NAME** field for the chosen line to activate the drop down list arrow, then select the macro name to associate with this number from the drop down list.	The **COMMANDS** field is automatically filled in with the commands associated with this macro. The scroll box at the bottom of the screen provides reference information about each command.
		Note: *If you need to create a macro, see Section 8.4, Managing User-Defined Call Processing Macros. To edit a macro, see Section 8.4.3.1, Adding a Command to the User-Defined Macro, or Section 8.4.3.2, Removing a Command from the Macro.*
5	After you have assigned names to all macro numbers of interest, click on **OK**.	A **MESSAGE** box appears notifying you of the number of phones about to be changed.
6	Click on **YES** if you want to proceed with the change(s), **or** Click on **NO** to maintain the current macro settings.	Returns the **GLOBAL PHONE CHANGES** screen. *Figure 8-54.*
7	Click on **APPLY CHANGES**.	This command updates the database and changes all the file assignments to those specified.
		The **STOP** - download warning screen appears. *Figure 8-1*. See Chapter 8, *Managing Payphone Configuration*, for download instructions.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1*.

8.9.5 CLEARING THE PHONE SELECTION LIST

The list of phones displayed in the **GLOBAL PHONE CHANGES** screen **PHONE SELECTED** list (see Figure 8-51) can be cleared by the following methods:

• Click on **CLEAR**.

• Change the selection criteria and then click on **SELECT PHONES**.

9. BUSINESS MANAGEMENT

Another feature of PNM Plus is that it enables you to perform business management activities. You initiate all business management activities from the **BUSINESS ADMINISTRATION MENU** (see Figure 9-1).

Figure 9-1

9.1 Cost Accounting Activities

Cost Accounting activity is defined by a set of Account Codes. These codes represent expense, income, repair, commissions, and general types of financial transactions that affect your payphones, parts inventory, technicians, services paid to other parties, and other typical business transactions you might encounter. The Account Code name and type can be defined through the PNM Plus System Configuration function (see Section 9.2, *Setting Accounting Codes*).

Through the **COST ACCOUNTING JOURNAL** screen, you can enter and control your expenses and revenue records by account code. The **COST ACCOUNTING JOURNAL** screen presents (by phone number) the last date an expense or a revenue record was recorded, a description of the account code, the total amount, and any notes that were entered.

Figure 9-2 shows you an example of a **COST ACCOUNTING JOURNAL** screen.
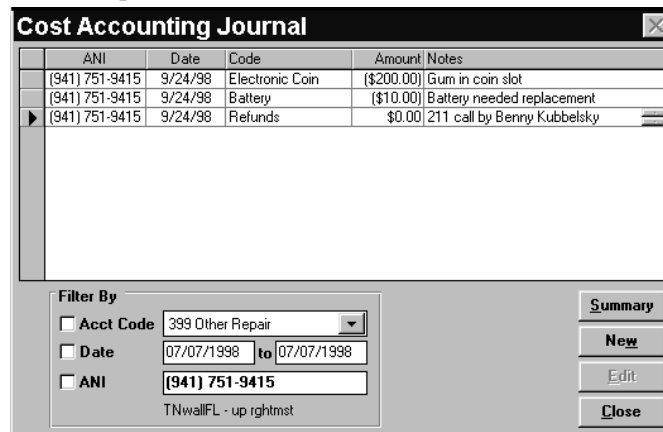
Figure 9-2

9.1.1 FILTERING INFORMATION

You can filter (limit) the information displayed on this screen by accounting code, date range, and ANI.

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **3** (Cost Accounting).	The **COST ACCOUNTING JOURNAL** screen appears. *Figure 9-2*.
3	You can filter the information displayed by selecting one of the following in the **FILTER BY** window:	
	• Accounting Code	To display the ANIs that have had a particular activity performed on them (e.g., keypad repair, OSP revenue collected), click on the **ACCT CODE** check box (an *X* is inserted) and then click on the arrow to the right of the field. A list of account codes appears. Select the account code that represents the activity you want. The ANIs included in this account code appear in the screen.
	• Date Range	To display the ANIs that have had activity within a specific date range, click on the **DATE** check box and then enter the range of inclusive dates you want to view. The ANIs that had activity during this range appear in the screen.
	• ANI	To display activity for a specific ANI, click on the **ANI** check box and then enter the ANI you want to view. The activity for that ANI appears in the screen.
		The corresponding site name appears at the bottom of the **FILTER BY** window.
		Figure 9-3 displays an example of the items in the previous **COST ACCOUNTING JOURNAL** screen filtered by a date:
		Figure 9-3
		You can select more than one filter at a time. For example, you can select a date range and an ANI to display all activity for that ANI during the date range you entered.
4	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. *Figure 3-1.*
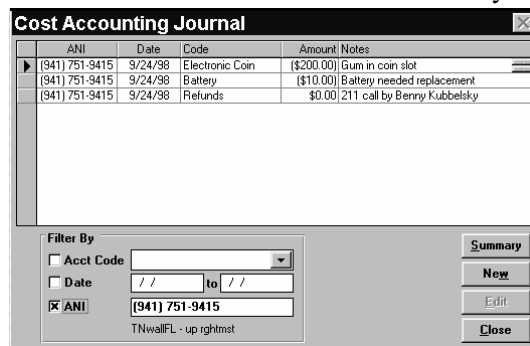
9.1.2 VIEWING A SUMMARY

Once you have chosen a filter, you can view a summary of the following for the ANIs listed in the
COST ACCOUNTING JOURNAL screen:

- Count - total number of entries in the journal

- Expense - total expense items

- Income - total income items

- Net - difference between Income and Expense

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **3** (Cost Accounting).	The **COST ACCOUNTING JOURNAL** screen appears. *Figure 9-2*.
3	Click on **SUMMARY**.	The summary information appears next to the **FILTER BY** window. *Figure 9-4*.
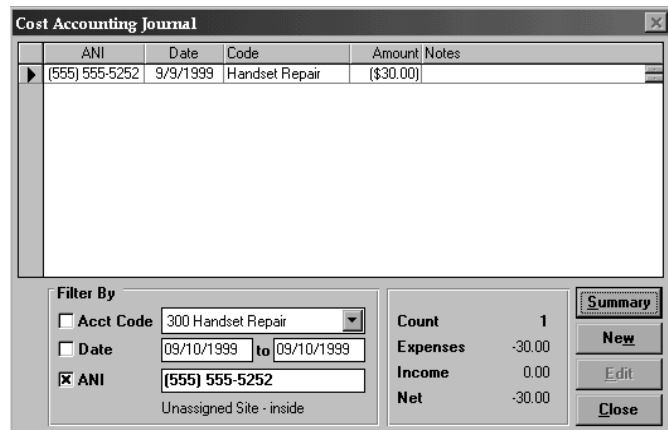
Figure 9-4

4	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU.** *Figure 3-1*.

9.1.3 MODIFYING AN ENTRY IN THE COST ACCOUNTING JOURNAL SCREEN

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. ***Figure 9-1***.
2	Click on **3** (Cost Accounting).	The **COST ACCOUNTING JOURNAL** screen appears. ***Figure 9-2.***
3	Select the row you want to edit by clicking on the box to the left of the ANI.	
4	Click on **EDIT.**	The **COST ACCOUNTING JOURNAL ENTRY EDIT** screen appears for the entry you selected. ***Figure 9-5***.
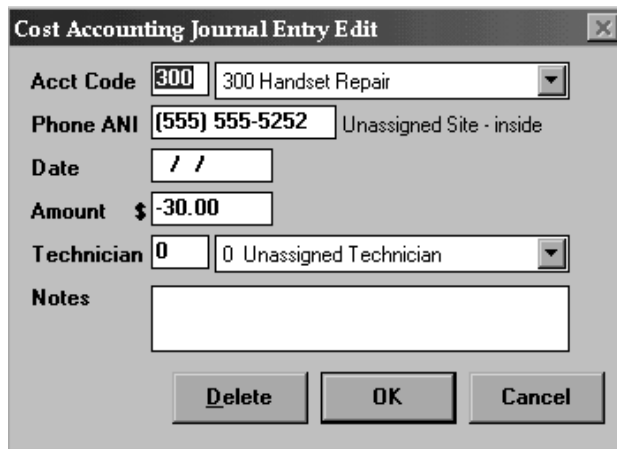
Figure 9-5

5	Do one or more of the following:	
	• To change the accounting code, highlight the accounting code number in the first **ACCT CODE** field and enter the new accounting code.	You can also click on the second box in the **ACCT CODE** field to display a drop down list of accounting codes and then select a code from the list.
	• To change the ANI, enter the new ANI in the **PHONE ANI** field.	The site where the ANI is located appears next to the **PHONE ANI** field.
	• To change the date, enter the new date in the **DATE** field.	
	• To change the amount of the account, enter the amount in the **AMOUNT** field.	If you need to enter a negative amount (i.e., debit, expense) in any screen's **AMOUNT** field, precede the number with a negative sign. For example, if you paid a technician $20 to fix a phone, enter the amount as ***$-20.00***.

	• To change the technician assigned to the account, click on the arrow to the right of the **TECHNICIAN** field and select a technician from the drop down list.	You also can change the technician by changing the technician's ID in the first **TECHNICIAN** field.
	• To change the notes about the account, enter the notes in the **NOTES** field.	
6	Click on **OK**.	Your changes are saved. Returns the **COST ACCOUNTING JOURNAL** screen. *Figure 9-2*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU.** *FIGURE 3-1.*

9.1.4 ADDING AN ENTRY TO THE COST ACCOUNTING JOURNAL SCREEN

If you have received new income (e.g., coin collection) or had a new expense (e.g., handset repair), you need to add it to the **COST ACCOUNTING JOURNAL** screen through the **COST ACCOUNTING JOURNAL ENTRY** screen.

The design of the **COST ACCOUNTING JOURNAL ENTRY** screen provides you with a flexible system that enables you to quickly enter multiple entries into your database.

The data entry controls, located on the upper right corner of this screen, change the screen mechanics to:

  • Simulate a 10-key pad (like a calculator)

  • Auto-decimal your cost entries

  • Clear each cost accounting detail entry after it has been added

In addition, a Holding Queue is provided as an optional location for you to add the cost accounting entries as a safety net to help prevent erroneous information from being directly entered into the database. The following figure graphically displays this:
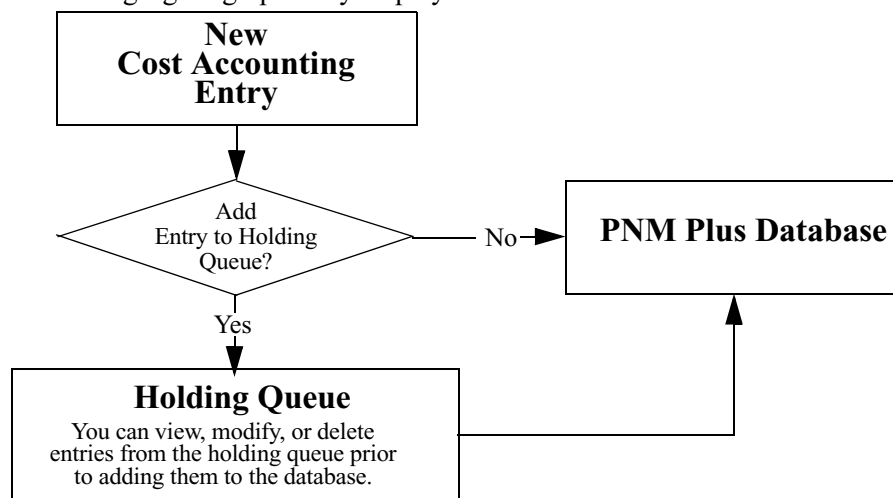
From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **3** (Cost Accounting).	The **COST ACCOUNTING JOURNAL** screen appears. *Figure 9-2.*
3	Click on **NEW**.	The **COST ACCOUNTING JOURNAL ENTRY** screen appears. *Figure 9-6*.

Figure 9-6

4	Click on the second box in the **ACCT CODE** field and select an account code from the drop down list.	You also can select the accounting code number in the first **ACCT CODE** field and enter the new accounting code.
5	At the **PHONE ANI** field, enter the ANI of the phone that had the income or expense.	The site where the ANI is located appears next to the field.
6	Enter the date for the journal entry in the **DATE** field.	
7	Enter the amount of the income or expense in the **AMOUNT** field.	If you need to enter a negative amount (i.e., debit, expense) in any screen's **AMOUNT** field, end the number with a negative sign. For example, if you paid a technician $20 to fix a phone, enter the amount as *$20.00-*.

The amount for each entry defaults to the Account Code amount specified in the System Configuration accounting code table (see Section 9.2, *Setting Accounting Codes*). |
| **8** | Click on the arrow to the right of the **TECHNICIAN** field and select the technician who collected the money or made the repair. | You also can add the technician by adding the technician's ID in the first **TECHNICIAN** field.

The entry in this field defaults to the person servicing the site where the payphone is located. |
| **9** | Enter any notes relating to this entry in the **NOTES** field. | |

10	Do one of the following:	
	• If you want the entry entered directly into the PNM Plus database:	The **COST ACCOUNTING JOURNAL ENTRY** screen appears with the new entry. *Figure 9-6*.
	• Select the **WRITE DIRECTLY TO DATABASE** button in the **CONTROLS** window.	
	• Click on **ADD TO DATABASE**.	Checked boxes appear next to the data to be entered into the database and the journal entry appears in the **LAST RECORD ADDED TO DATABASE** field in the lower half of the screen.
	• Click on **CANCEL**.	Returns the **COST ACCOUNTING JOURNAL** screen with the new entry. *Figure 9-3*.
	• If you want the entry sent to a holding queue that you can add to the database at a later point in time:	If you place the new entry in a holding queue, you can edit it before adding it to the database (see Section 9.1.5, *Editing an Entry in the Holding Queue*). You can add more than one entry to the Holding Queue before sending the entries to the database. If you click on **CANCEL** before adding the entries to the database, you lose all entries in the queue.
	• Select the **WRITE TO A HOLDING QUEUE** button in the **CONTROLS** window.	
	• Click on **ADD TO QUEUE**.	Checked boxes appear next to the data to be entered into the database and the journal entry appears in the **HOLDING QUEUE** field in the lower half of the screen.
	• If you have one or more entries in the Holding Queue, click on **DONE** to add them to the database.	Returns the **COST ACCOUNTING JOURNAL** screen with the new entry or entries. *Figure 9-3*.
11	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1.*

9.1.5 EDITING AN ENTRY IN THE HOLDING QUEUE

1	Follow the first 9 steps in Section 9.1.4, *Adding an Entry to the Cost Accounting Journal Screen*.	
2	Select the **WRITE TO A HOLDING QUEUE** button in the **CONTROL** window and then click on **ADD TO QUEUE**.	Checked boxes appear next to the data to be entered into the database and the journal entry appears in the **HOLDING QUEUE** field in the lower half of the screen.
3	Select the item in the holding queue you want to edit by clicking on the box to the left of the item.	
4	Click on **EDIT**.	The data for the selected queue entry appears in the fields in the top half of the **COST ACCOUNTING JOURNAL ENTRY** screen. *Figure 9-6*.
5	Edit a field by entering over the data or by selecting the desired information from the provided drop down lists.	
6	When you have completed making your changes, click on **UPDATE QUEUE**.	The changes are made in the Holding Queue.
7	Click on **DONE** to add the changes to the database.	Returns the **COST ACCOUNTING JOURNAL** screen with the updated entry. *Figure 9-2*.
8	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.1.6 DELETING AN ENTRY IN THE HOLDING QUEUE

1	Follow the first 2 steps in Section 9.1.5, *Editing an Entry in the Holding Queue*.	
2	Select the item in the Holding Queue you want to delete by clicking on the box to the left of the item.	
3	Click on **DELETE** and then click on **YES** at the prompt.	The entry is deleted from the Holding Queue.
4	Click on **DONE**.	Returns the **COST ACCOUNTING JOURNAL** screen. *Figure 9-2*.
5	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.2 Setting Accounting Codes

Accounting Codes provide you with classification codes for costs and expenses incurred while your phone was being serviced. You can tailor the list of account codes to your needs and use General, Commission, or Repair types to summarize many accounting codes into one type.

9.2.1 ENTERING OR MODIFYING AN ACCOUNT CODE

From the **OPERATOR CONSOLE** screen:

1	Click on the **CONFIGURATION** icon.	The **CONFIGURATION MENU** appears. ***Figure 7-4***.
2	Click on **10** (System Configuration).	The **SYSTEM CONFIGURATION** screen appears. ***Figure 7-5.***
3	Select the **ACCOUNTING CODES** tab.	An accounting table similar to the following appears. ***Figure 9-7***.
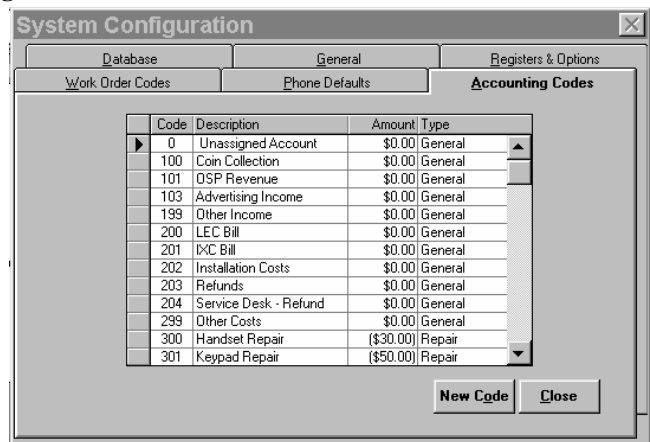
Figure 9-7

Following is a definition of each column in this table:

- Code: A number from **0** to **999** for an account code

- Description: A narrative that explains an account code

- Amount: Dollar amount posted and assigned as the default for the account code

- Type: Includes General (default), Commission, and Repair selections. Used to group several account codes.

4	If you are modifying an existing account code, move the insertion point to the column you want to change and then edit it. Proceed to step 7.	

5	If you are entering a new account code, click on the **NEW CODE** button.	The **NEW ACCOUNT CODE** screen appears. *Figure 9-8.* Enter the new account code, description, amount, and type.
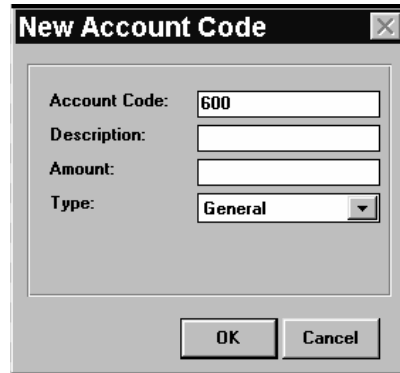
Figure 9-8

6	Click on **OK**	Returns the **SYSTEM CONFIGURATION** screen. *Figure 7-5*.
7	Click on **CLOSE**.	Saves the addition or modification. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.3 Marketing and Sales Activities

PNM Plus is divided into major functional areas that address broad aspects of how you operate your business. In addition to the day-to-day operational tasks of polling phones and managing payphone operational file contents, a major task you must perform involves the administrative issues surrounding any type of business. These tasks are collected into the Business Administration area of PNM Plus.

The degree to which you use the Business Administration functions are yours to decide. The program is delivered to you with a default set of entries that you never have to change if you elect not to use this function of the program. You can use some of the supported functions and not others. Daily operation of your payphones is not affected by the extent to which you decide to use these provided features.

The major subfunctions within Business Administration include:

- Customer account management
- Contract management and record keeping
- Setting of commission formulas for contracts
- Performing periodic commissions calculations
- Performing queries to determine various business performance parameters

In many cases, displays within the Business Administration function will replace printed reports previously used. Such displays are fast and efficient ways to aggregate data into meaningful on-screen reports.

The data entered into the database using Business Administration screens is also available for viewing through the Payphone Administration screens. At your option, you can invoke the Business Administration function from its icon on the main menu, or you can use the **CUSTOMER** and **CONTRACT** buttons on the **NAVIGATION** screen to get to these screens.

Accounting activity occurs within the Business Administration function. You can define a set of Account Codes to represent expense, income, repair, commissions, and general types of financial transactions.

Although the Cost Accounting support within Business Administration performs some business accounting activity, it is not intended to be a specialized accounting system. It does, however, provide adequate support for tracking income and expenses and for computing commissions payable to shop owners based on commission formulas you set.

PNM Plus enables you to establish and maintain relationships between customers with contractual arrangements they sign with you. You also can establish relationships between sites and contracts so that each site and the payphone activity at that site can be related to the appropriate commission formula.

Relationships that you set up are depicted in the following picture. Your database can have many Customers in it. Each Customer can have one or more Contracts. Each Contract, in turn, covers one or more payphone sites, such as convenience stores, restaurants, shopping malls, or wherever else you have placed a payphone. Once you establish the relationship shown in the picture, you can easily see how you have the ability to list sites belonging to a Customer or see which sites will be affected by the termination of a Contract.
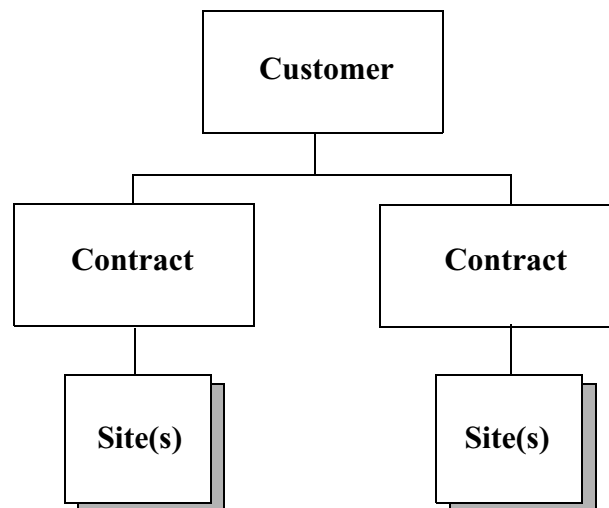
Since the Contracts shown in the previous picture are the points at which you define the business arrangements with site owners (customers), they also serve as the top of the cost accounting pyramid. If you have a Customer with only one Contract to cover all his sites and payphones, the calculated commission at the Contract level will give you a single number representing the check amount the Customer should get.

A Customer with multiple Contracts can get multiple commission checks (one for each Contract) or a single check that is the sum of the calculated commissions for each Contract. Producing the check is done outside of PNM Plus, but you can get the detail numbers supporting the check amount from screens and processes within PNM Plus.

The following chart shows the relationships of the elements involved in tying together accounting information within PNM Plus. Accounting data is aggregated at the Contract level. Underneath a Contract can be one or more commission plans. If there are multiple commission plans, all of the same sites and payphones fall under all plans within a Contract.

You cannot have 10 sites in a Contract with 5 using one plan and the other 5 using a different plan. If you need different commission terms for a group of sites, you need to draft a second Contract. All payphones are tied to the site where they are physically placed.
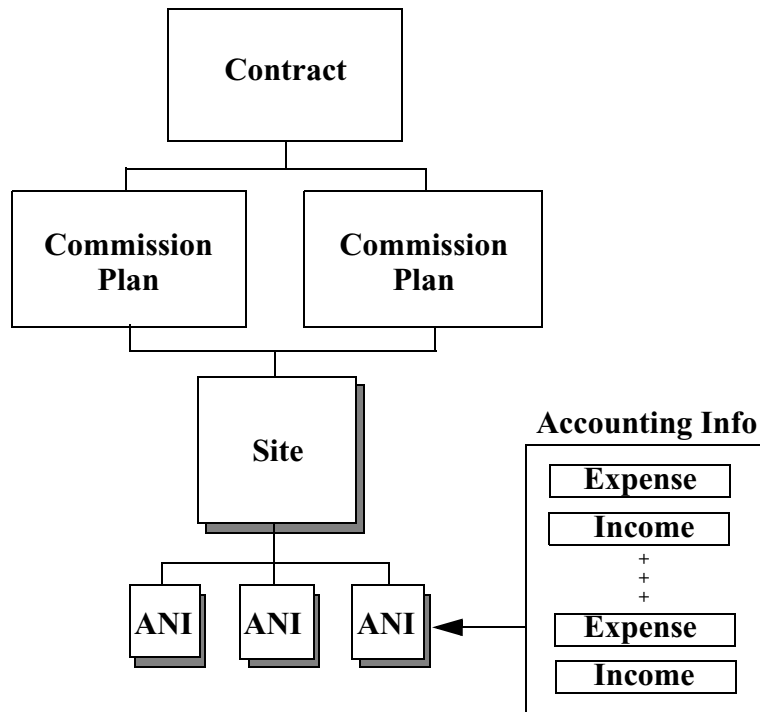
The way accounting information is processed is that Accounting Journal entries are tied directly to a payphone (by ANI) that they represent. In the Accounting Journal is a list of detail line items, some of which are expenses and some of which are income for the payphone for the period being processed.

The amounts in these journal records are netted to yield a single number. That number is fed up to the site, up to the plan, and then up to the Contract along the hierarchy shown in the previous flow chart to calculate commissions payable at the Contract level.

To support this process, data entry screens are provided as needed at various points within PNM Plus to enable you to enter expense and income records to the Accounting Journal.

Some records are automatically entered into the journal for you based on daily operational tasks you do. Others you must enter manually since the information (such as labor costs to repair a phone) comes from an external source. The quality of the data output from calculations using the Accounting Journal entries is directly affected by the quality of the data input into the journal.

9.4 Administering Customer & Contract Information

The following sections discuss how to use PNM Plus to enter customer and contract information.

9.4.1 ADMINISTERING CUSTOMER INFORMATION

PNM Plus enables you to maintain your Customer database by collecting information about the Customer and the Contracts and by specifying the commission arrangements with the Customer. PNM Plus also provides you with the capability to support Managed Accounts, such as Customer accounts.

Through the **CUSTOMER DETAIL** screen (see Figure 9-9), you can add, update, or delete customer names, addresses, and contracts in the database.

9.4.1.1 Adding a Customer to the Database

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. ***Figure 9-1***.
2	Click on **1** (Customer Information).	The **CUSTOMER DETAIL** screen appears. ***Figure 9-9***. Note: *You can also access the **CUSTOMER DETAIL** screen through the Payphone Administration function of PNM Plus. See Section 4.4.5, Adding Contracts and Customers to the Database.*

Figure 9-9

3	At the **CUSTOMER** window, click **NEW**.	
4	The **CUSTOMER ID** field contains a number used to identify specific customers.	This read only entry is assigned by PNM Plus. It may be useful for accounting purposes.
5	Enter the customer name and address, contact person, phone number, fax number, and tax ID in the appropriate fields.	
6	Click on the arrow next to the **CUSTOMER** field and select an account type.	The account type can be Customer or Managed.
7	Click on **OK.**	Saves the entered customer information. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. ***Figure 3-1***.

9.4.1.2 Updating an Existing Customer

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **1** (Customer Information).	The **CUSTOMER DETAIL** screen appears. *Figure 9-9.*
3	Click on the customer from the **CUSTOMER LIST** box.	Information on the customer appears in the screen.
4	Enter new information in the fields you want to update.	
5	Click on **OK**.	Saves the new information. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.4.1.3 Deleting an Existing Customer

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **1** (Customer Information).	The **CUSTOMER DETAIL** screen appears. *Figure 9-9.*
3	Click on the customer from the **CUSTOMER LIST** box.	Information on the customer appears in the screen.
4	If Contracts are assigned to the Customer, you must first move the contracts assigned to this customer by performing the following steps: • Click on a contract in the **CONTRACT LIST**. • Click on **VIEW**. • Use the **CONTRACT FOR CUST** drop down list to move the contract to a different customer. • Click on **OK** to return to the **CUSTOMER DETAIL** screen. *Figure 9-9*.	The **CONTRACT DETAIL** screen for that contract appears. *Figure 9-9*. See Section 9.4.2, *Administering Contract Information*, for information on contracts*.*
5	Repeat step 4 for each contract in the customer's **CONTRACT LIST**.	
6	Click on **DELETE** at the **CUSTOMER DETAIL** screen and answer **YES** at the prompt.	The customer is deleted from the database. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1.*

9.4.1.4 Viewing the Contracts Assigned to the Customer

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **1** (Customer Information).	The **CUSTOMER DETAIL** screen appears. *Figure 9-9*.
3	If you have already assigned a contract to a customer, click on the contract name in the **CONTRACTS** window.	
4	Click on **VIEW**.	The **CONTRACT DETAIL** screen for that contract appears. See Section 9.4.2, *Administering Contract Information*, for information on contracts.
5	Click on **OK**.	Returns the **CUSTOMER DETAIL** screen. *Figure 9-9*.
6	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.4.1.5 Assigning a New Contract with the New Customer

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **1** (Customer Information).	The **CUSTOMER DETAIL** screen appears. *Figure 9-9.*
3	At the **CONTRACTS** window, click on **NEW**.	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
4	Complete the **CONTRACT DETAIL** screen.	See Section 9.4.2, *Administering Contract Information*, for instructions on completing the **CONTRACT DETAIL** screen.
5	Click on **OK**.	Returns the **CUSTOMER DETAIL** screen. *Figure 9-9*.
6	Click on **OK**.	The contract is assigned to the customer. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU.** *Figure 3-1.*

9.4.1.6 Processing Notes for a Customer

You can access an optional facility for storing and viewing up to 1024 characters of free-form notes. You can view existing notes, add new notes, change the content of existing notes, and delete notes using this facility.
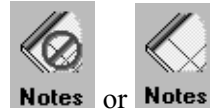
The **CUSTOMER DETAIL** screen contains one of these two icons: **Notes** or **Notes**.

The first icon indicates there are presently no notes on file for this customer. The second icon indicates that notes are in the database and are available for viewing.

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **1** (Customer Information).	The **CUSTOMER DETAIL** screen appears. *Figure 9-9.*
3	To add notes, click on the **Notes** icon.	The **NOTES** screen appears. *Figure 9-10*. *Figure 9-10*
4	Add new notes data.	
5	Click on **OK**.	Returns the **CUSTOMER DETAIL** screen. *Figure 9-9*.
6	To view notes, click on the **Notes** icon.	The **NOTES** screen appears. *Figure 9-11*. *Figure 9-11*
7	Read the notes in the screen.	
8	Click on **OK** or **CANCEL.**	Returns the **CUSTOMER DETAIL** screen. *Figure 9-9.*
9	To delete notes, click on the **Notes** icon.	The **NOTES** screen appears.
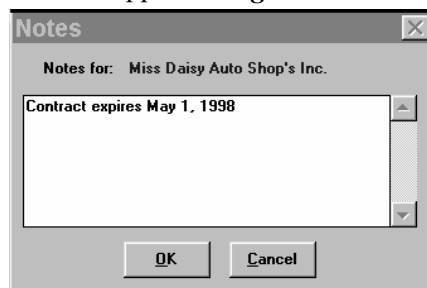
10	Erase all notes in the **NOTES** screen (including all blanks and spaces).	
11	Click on **OK.**	Returns the **CUSTOMER DETAIL** screen. *Figure 9-9*.
		The **NOTES** icon should change to show that there are no notes for this phone.
12	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.4.2 ADMINISTERING CONTRACT INFORMATION

A Contract represents the agreement you make with the owner (customer) of the site where the payphones are placed. Each Contract can cover one or more sites. Each site can have one or more payphones. Generally, each Contract lasts a specified term that begins and ends on specific dates. PNM Plus helps you manage your Contracts by displaying the number of days remaining for each Contract.

In addition, you can indicate the commission plan agreed to by the customer (see Section 9.6.1, *Commission Plan Maintenance*). Through the **CONTRACT DETAIL** screen, you can maintain a list of all Contracts and locations covered and manage the terms and renewal dates, which will help organize your work load.

The **CONTRACT DETAIL** screen enables you to enter the information on the Contract for the sites where the payphones are located. In addition, the Contract holds the Commission plan to be applied for these sites.

9.4.2.1 Entering a New Contract

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.

Note: *You can also access the CONTRACT DETAIL screen through the Payphone Administration function of PNM Plus. See Section 4.4.5, Adding Contracts and Customers to the Database, for more information.*

Figure 9-12

3	Click on **NEW**.	The **CONTRACT ID** field contains a read only number assigned by PNM Plus used to identify specific contracts. This number may be useful for your accounting purposes.
4	Assign a customer to the contract by selecting a customer from the **CONTRACT FOR CUST** drop down list.	
5	Enter the name of the contract in the **DESCRIPTION** field.	
6	Enter the Start and End Dates of the Contract in the **START DATE** and **END DATE** fields.	
7	In the **RENEWAL NOTICE** field, enter the number of days before a customer's contract expires that you want to mail the customer a renewal notice.	
8	Click on **OK**.	Enters the new contract into the database. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU.** *Figure 3-1.*

9.4.2.2 Updating a Contract

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on a contract from the **CONTRACT LIST** box.	Information on the contract appears in the right side of the screen.
4	Enter new information in the fields you want to update.	
5	Click on **OK**.	The new information is added to the contract. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU.** *Figure 3-1.*

9.4.2.3 Deleting a Contract

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.

3	Click on a contract from the **CONTRACT LIST** box.	Information on the contract appears in the right side of the screen.
4	If sites are assigned to this contract, click on **CHANGE SITES** at the **CONTRACT DETAIL** screen. If no sites are assigned, go to step 7	The **SITES ON CONTRACT** screen appears. *Figure 9-13*. See Section 9.4.2.4, *Assigning Sites Covered by a Contract*, for instructions on using the **SITES ON CONTRACT** screen.
5	Click on the sites in the **SITES ASSIGNED** list box and then click on **REMOVE**.	The sites move to the **ALL UNASSIGNED SITES** list box.
6	When all the sites are removed, click on **OK**.	Removes the sites from the contract. Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
7	When no sites appear in the **CONTRACT DETAIL** screen's **SITES COVERED** window, click on **DELETE** and then click on **YES** at the prompt.	The contract is purged from the database. Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*. The sites that need to be covered by the Contract can be defined within the Payphone Administration function. If sites are already defined, you can assign the sites on Contract.

9.4.2.4 Assigning Sites Covered by a Contract

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on **CHANGE SITES.**	The **SITES ON CONTRACT** screen appears. *Figure 9-13*.

Figure 9-13

4	Select the site from the **ALL UNASSIGNED SITES** list box that you want to assign.	
5	Double click on the site or click on **ADD.**	The site moves to the **SITES ASSIGNED** list box.
6	Repeat steps 4 and 5 for each site you add.	
7	Click on **OK**.	The sites are added to the contract. Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
8	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.4.2.5 Removing Sites from a Contract

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on **CHANGE SITES.**	The **SITES ON CONTRACT** screen appears. *Figure 9-13.*
4	Select the site from the **SITES ASSIGNED** list box that you want to remove.	
5	Double click on the site or click on **REMOVE.**	The site moves to the **ALL UNASSIGNED SITES** list box.
6	Repeat steps 5 and 6 for each site you want to remove.	
7	Click on **OK**.	The sites are removed from the contract. Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
8	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU.** *Figure 3-1.*

9.5 Estimating Payphone Expenses

PNM Plus provides you with a tool to estimate your business expenses. Tables are available for estimating your tax liability and your local and long distance carrier expenses. This section explains how you can take advantage of this feature.

9.5.1 ESTIMATING YOUR BUSINESS TAX LIABILITY

This user defined Tax Rate Table provides the data that is used to estimate Federal, State, City, Local, and other taxes for your quarterly estimated tax payments. The data is available through PNM Plus Reports number 32.

Note: *These tables produce an __estimate__ of the required call type tax.*

9.5.1.1 Adding a New Tax Rate Table

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **6** (Tax Rate Editor).	The **TAX RATE TEMPLATE** screen appears. *Figure 9-14.*

Tax Rate Templates

Name	Description
City	State, City, and County Taxes
County	State and County Taxes only
Downtown	Template for all downtown phones
State	State Taxes only
Unassigned	Unassigned Template (No Taxes)

Edit   New   Delete   Rename   Close

Figure 9-14

3	Highlight the name of the template you wish to use to create your new template.	To begin with a blank tax rate template, select **UNASSIGNED**.
4	Click on **NEW.**	PNM Plus asks if you want to create a new template like the one selected. Click on **YES** to continue.
5	Enter a Name and a Description for this new Tax Rate Table.	When finished, the Tax Rate Template screen returns. *Figure 9-14*. You can now continue with step 3 of Section 9.5.1.2.

9.5.1.2 Editing an Existing Tax Rate Table

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **6** (Tax Rates).	The **TAX RATE TEMPLATE** screen appears. *Figure 9-14.*
3	Highlight the name of the template you wish to edit.	
4	Click on **EDIT.**	The **EDIT TAX RATE TEMPLATE** screen appears. *Figure 9-15.*
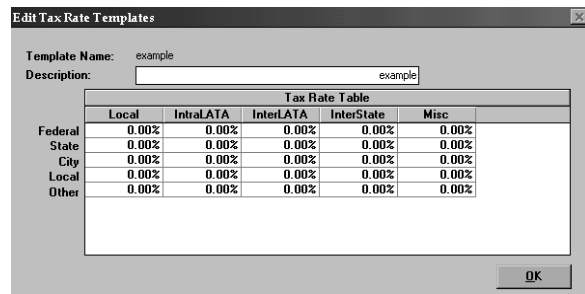
Figure 9-15

5	Enter Federal, State, Local, and Other tax information in the table**.**	The table has sections for each type of tax and each call type. **Note:** *Percentage amounts are entered in numbers less than 1 (e.g., 30 percent is entered as 0.3 and 1 percent is entered as .01).*
6	Click on **OK**.	Returns the **TAX RATE TEMPLATE** screen. *Figure 9-14*.
7	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU.** *Figure 3-1.*

9.5.2 ESTIMATING YOUR LOCAL AND LONG DISTANCE CARRIER EXPENSES

This feature allows you to estimate your local and long distance carrier costs. Knowing these costs will make it easier to estimate your tax liability. Fill in the table and the results of these estimated expenses will be reflected in PNM Plus Reports number 31.

Note: *This feature provides you with an estimate of your phone line expenses.*

9.5.2.1 Adding a Local/LD Charged Rate Table

From the **OPERATOR CONSOLE** screen:
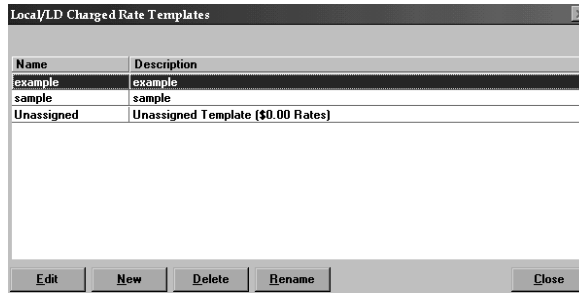
1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **5** (Charged Rates).	The **LOCAL/LD CHARGED RATE TEMPLATE** screen appears. *Figure 9-16*. *Figure 9-16*
3	Highlight the name of the template you wish to use to create your new template.	To create a blank template, select **UNASSIGNED**.
4	Click on **NEW.**	PNM Plus asks if you want to create a new template like the one selected. Click on **YES** to continue.
5	Enter a Name and a Description for this new Charged Rate Table.	When finished, the Charged Rate Template screen returns. *Figure 9-16.* You can now continue with step 3 of Section 9.5.2.2.

9.5.2.2 Editing an Existing Local/LD Charged Rate Table

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **5** (Charged Rates).	The **LOCAL/LD CHARGED RATE TEMPLATE** screen appears. *Figure 9-16.*
3	Highlight the name of the template you wish to edit.	
4	Click on **EDIT.**	The **EDIT LOCAL/LD CHARGED RATE TEMPLATE** screen appears. *Figure 9-17.* *Figure 9-17*
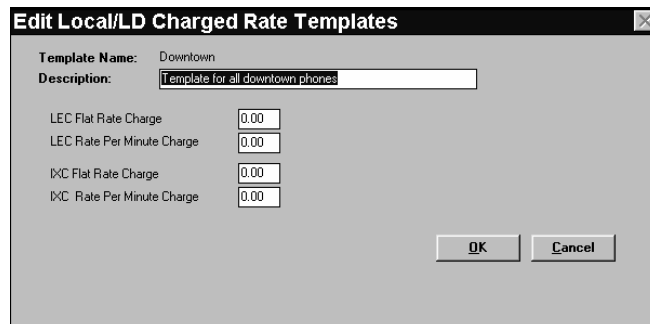
5	Enter **LEC FLAT RATE CHARGE** in the table**.**	
6	Enter **LEC PER MINUTE CHARGE** in the table**.**	
7	Enter **IXC FLAT RATE CHARGE** in the table**.**	
8	Enter **IXC PER MINUTE CHARGE** in the table**.**	
9	Click on **OK**.	Returns the **LOCAL/LD CHARGED RATE TEMPLATE** screen. *Figure 9-16*.
10	Click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.6 Determining Commissions

The Commission feature represents the revenue agreement that is specified between you and the owner of the location where the payphones are situated. Since Commission plans can vary by location, PNM Plus provides you with a Commissions utility that enables you to enter templates of typical commission plans that you can apply to your locations. The commission plans can be assigned to Contracts and can be created to meet Contract-specific requirements.

In addition to the defining of commissions, PNM Plus provides you with a flexible and powerful means to automate the calculation of commissions for payphone usage. The formula used by PNM Plus covers any Contractual arrangement you might want to make with site owners, salespersons, or others to whom periodic payments based on payphone usage activity is required.

Furthermore, PNM Plus commission processing goes beyond the scope of commissions calculations and can be used for other purposes, such as the calculation of taxes owed or the summarization of expenses within a certain category. These are discussed in this section.

To understand the functioning of commission processing, it is important to understand the relationships that have to be set up for the commissions calculation to work.

These relationships are shown in the following picture:

```
        ┌─────────────┐
        │  Contract   │
        └─────────────┘
               │
        ┌─────────────┐
        │ Commission  │
        │  Plan(s)    │
        └─────────────┘
               │
        ┌─────────────┐
        │   Site(s)   │
        └─────────────┘
               │
        ┌─────────────┐
        │ Payphone(s) │
        └─────────────┘
```
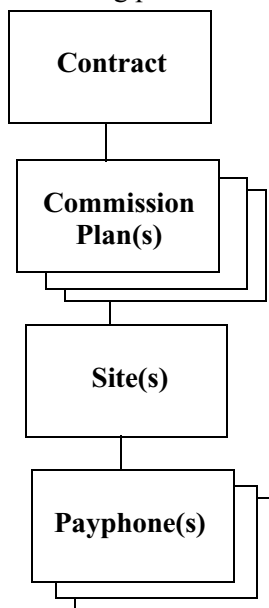
Every individual payphone you want to have involved in a commissions calculation *must* exist underneath a business Contract. In normal daily operations, contractual agreements stipulate the commissions the Customer will receive, so this is a natural arrangement. Within a Contract, you can define one or more commission plans.

Having multiple plans within a Contract is a powerful feature of the commissions calculation and will be explained later in this section. Associated with each Contract are one or more sites at which the Customer has payphones. At each site, one or more payphones can be placed.

It is important to note that if you do *not* define a Contract for a site, or if you do *not* define commission plans for a Contract, then commission calculations for payphones at sites below the missing Contract are *not* performed.

Commissions calculations give you the flexibility of deciding which revenues and which expenses go into the computing of commissions payments. Furthermore, you can define commissions to be based on flat percentages of usage, fixed dollar amounts, or fixed dollar amounts with an additional percentage above a predetermined amount.

You can also define multiple formulas so that commissions payments can be split among an unlimited number of parties. You can run commissions calculations monthly, quarterly, or on any other basis you decide.

9.6.1 COMMISSION PLAN MAINTENANCE

Through the Contract function of PNM Plus, you can define the commission plans that will be used to calculate the revenue generated by that Contract. The definition of a commission plan includes the Plan Name, Plan Type, the Rate Schedule, and the Account Codes used to calculate the commission revenue. These are described in the following table.

Commission Plan Element	Description
Plan Name	A descriptive name for the commission plan.
Plan Type	The way that the commission is calculated. There are three options: **Phone Basis**: Each phone has its commission calculated individually. **Average per Site**: The average revenue amount for all phones at each site is taken and the commission is then calculated. **Average per Contract**: The average revenue amount for all sites on each contract is taken and the commission is then calculated.
Rate Schedule	The rate schedule consists of a low and high amount. These represent the limits of the amounts on which commissions are calculated. The dollar amount represents the flat amount that is used every time the account code is entered. The percentage is the revenue percentage for the dollar amount *over the low amount*, which is added to the dollar amount to calculate the total commission.
Account Codes	Every time an account code is entered in the system (i.e., through the **ACCOUNTING JOURNAL ENTRY** screen, **WORK ORDER ENTRY** screen, or **SYSTEM CONFIGURATION - ACCOUNTING CODES** screen), it is used to calculate the basis for the low and high amounts used to derive the dollars and percentages.

9.6.1.1 Creating a Commission Plan

You can create a new plan, name the plan, set the account code to which the calculated output will be written, and designate a plan type (see Section 9.6.1, *Commission Plan Maintenance*).

You also define a commission rate schedule of payments on this screen. This facility gives you wide latitude in setting commissions formulas. You define an amount range, a fixed dollar amount, and a percentage amount. For a given plan, there is no limit to the number of rows within a schedule that you define.

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on **COMMISSIONS**.	The **COMMISSION PLANS** screen appears. *Figure 9-20*.
4	Click on **NEW PLAN**.	The **COMMISSION PLAN MAINTENANCE** screen appears. *Figure 9-18*.

Figure 9-18

5	Enter the Commission Plan description in the **COMMISSION PLAN NAME** field.	
6	In the **ASSIGN COMMISSION CALCULATION TO ACCOUNT** field, click on the arrow and select the account to be assigned a commission calculation from the drop down list.	
7	In the **PLAN TYPE** field, click on the arrow and select a plan type from the drop down list.	
8	Enter the Commission Rate Schedule in the **COMMISSION PLAN MAINTENANCE** screen's **COMMISSION RATE SCHEDULE** fields.	**LOW AMOUNT**: Specify the lowest amount that must be met to calculate revenue using the formula on this line. **HIGH AMOUNT**: Specify the highest amount that must be met to calculate revenue using the formula on this line. **DOLLAR AMOUNT**: (If any) Enter the dollar amount that applies if the commission low and high values are met. **PERCENT**: (If any) Enter the percentage of the calculated amount that applies if the amount is between the low and high end value.
9	Click on **OK**.	A **MESSAGE** box appears stating that you have not yet assigned account codes to this commission plan.

| 10 | Click on **OK**. | The **COMMISSION PLAN BASIS** screen appears. *Figure 9-19*. |

Figure 9-19

See Section 9.6.1.6, *Editing the Account Codes used for the Commission Plan Basis*, for more information on using this screen.

11	Select the account codes to be added to the commission plan.	
12	Click on **OK**.	The **COMMISSION PLANS** screen appears. *Figure 9-20.*
13	Click on **OK**.	The commission plan is added to the database. Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
14	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1.*

9.6.1.2 Adding a Commission Plan to a Contract

Through PNM Plus, you can assign commission plans to Contracts, review the commission plan rate schedule and calculation basis, and calculate the commission revenue by Customer, Contract, ANI, and Accounting Codes.

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Select the contract to which you want to assign a commission plan.	

4	Click on **COMMISSIONS**.	The **COMMISSION PLANS** screen appears. *Figure 9-20*.
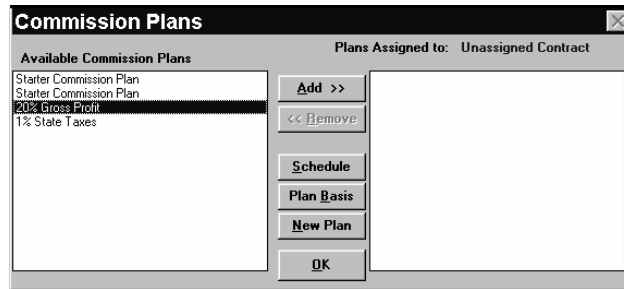
Figure 9-20

5	From the **AVAILABLE COMMISSION PLANS** list box, select the commission plan you want to add.	
6	Double click on the commission plan **or** click on the commission plan and then click on **ADD**.	The commission plan moves to the **PLANS ASSIGNED TO** list box.
7	Click on **OK**.	The commission plan is added to the contract. Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
8	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.6.1.3 Removing a Commission Plan from a Contract

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on **COMMISSIONS**.	The **COMMISSION PLANS** screen appears. *Figure 9-20*.
4	From the **PLANS ASSIGNED TO** list box, select the commission plan you want to remove.	
5	Double click on the commission plan **or** click on the commission plan and then click on **REMOVE**.	The commission plan moves to the **AVAILABLE COMMISSION PLANS** list box.
6	Click on **OK**.	The commission plan is removed from the contract. Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
7	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.6.1.4 Changing the Commission Rate Schedule

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on **COMMISSIONS**.	The **COMMISSION PLANS** screen appears. *Figure 9-20*.
4	Select the commission plan using the schedule you want to change.	
5	Click on **SCHEDULE.**	The **COMMISSION PLAN MAINTENANCE** screen appears for the commission plan you selected. *Figure 9-21*. *Figure 9-21*
6	From this screen, you can change the account code used to calculate commissions, the plan type, and the amounts and percentages in the **COMMISSION RATE SCHEDULE** field.	You can use pulldown lists at the **ASSIGN COMMISSION CALCULATION TO ACCOUNT** and **PLAN TYPE** fields.
7	When the screen contains the information you want, click on **OK**.	The Commission Rate Schedule is changed. Returns the **COMMISSION PLANS** screen. *Figure 9-20*.
8	Click on **OK.**	Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
9	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1.*
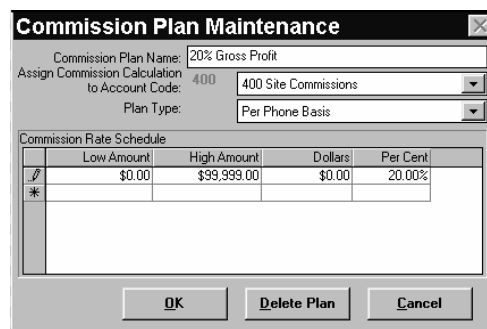
9.6.1.5 Deleting a Commission Plan

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on **COMMISSIONS**.	The **COMMISSION PLANS** screen appears. *Figure 9-20*.

4	Select the commission plan you want to delete.	
5	Click on **SCHEDULE.**	The **COMMISSION PLAN MAINTENANCE** screen appears. *Figure 9-21*.
6	Click on **DELETE PLAN**.	
7	Click on **YES** at the prompt.	Returns the **COMMISSION PLANS** screen. *Figure 9-20*. The commission plan is deleted from the database.
8	Click on **OK**.	Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
9	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU.** *Figure 3-1.*

Each Commission plan consists of two parts. The *Plan Basis* defines which account codes are to be used in calculating the commissions for the plan. The other element of defining a commission plan involves defining the *Schedule.* The **COMMISSION PLAN BASIS** screen, shown in the following section, enables you to select which of the account codes are used.

9.6.1.6 Editing the Account Codes used for the Commission Plan Basis

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **2** (Contract Information).	The **CONTRACT DETAIL** screen appears. *Figure 9-12*.
3	Click on **COMMISSIONS**.	The **COMMISSION PLANS** screen appears. *Figure 9-20*.
4	Select the Commission Plan you want to edit.	
5	Click on **PLAN BASIS**.	The **COMMISSION PLAN BASIS** screen appears. *Figure 9-22*.
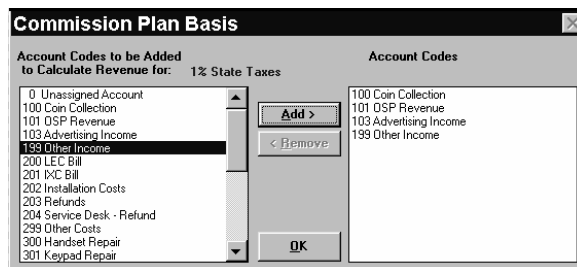
Figure 9-22

6	To add an account code to the commission plan, select the plan from the **ACCOUNT CODES TO BE ADDED TO CALCULATE REVENUE FOR** list box and then click on **ADD**.	The account code moves to the **ACCOUNT CODES** list box.

7	To remove an account code from the commission plan, select the plan from the **ACCOUNT CODES** list box and then click on **REMOVE**.	The account code moves to the **ACCOUNT CODES TO BE ADDED TO CALCULATE REVENUE FOR** list box.
8	Click on **OK**.	The account codes in the **ACCOUNT CODES** list box are added to the commission plan. Returns the **COMMISSION PLANS** screen. *Figure 9-20*.
9	Click on **OK**.	Returns the **CONTRACT DETAIL** screen. *Figure 9-12*.
10	Click on **OK**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1*.

9.6.2 COMMISSION REVENUE CALCULATION

The basic building block of all commission calculations is the definition of account codes you use to track revenues and expenses for your operation. See Section 9.2, *Setting Accounting Codes*, for details regarding adding or modifying Account Codes.

Figure 9-23 gives you an example of some entries in an account code table.

Account codes can be associated with repairs, general expenses and revenues, or commissions. You decide in which category the account codes you set up belong. PNM Plus enables you to define codes for entries *0* through *999*. During the month, activity against an individual payphone generates entries in an accounting journal using these defined account codes.
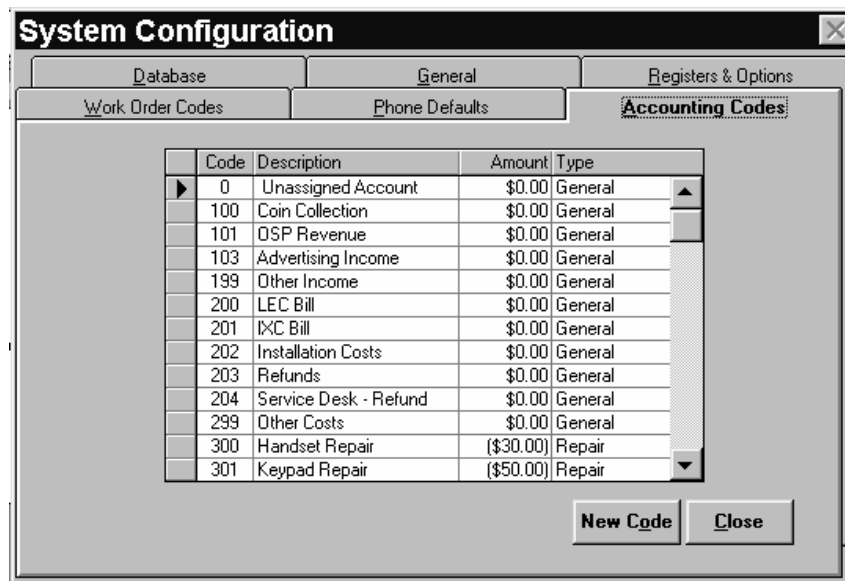
Figure 9-23

For example, each month you will likely get a bill from the LEC for local access. You will enter this as an expense item for that payphone (by ANI) into the accounting journal using a code you have defined for the LEC bill. If that payphone requires a repair visit, you can enter a code for the labor of the technician to make the trip. If the technician replaced a part, you can enter the cost of the part.

Each entry you make in the accounting journal must contain an ANI and an account code. This way, commissions calculations can tie revenues and expenses directly to each payphone. When you are ready to run your commissions calculation, your accounting journal will have a list of entries representing income and expenses for each payphone you own.

An example is shown in *Figure 9-24*.

Figure 9-24

Commission calculations involve taking this type of information from this payphone along with the same type of data from every other payphone in your database and computing commissions payable. This is done using rules you define when you set up the *Commission Plan*.

As described previously, the *Commission Plans* define the rules for calculating all commissions for everything associated with a Contract. Therefore, a commission plan can be set up for a single site with one payphone, or it can be set up to cover all your convenience stores in a three-state area. In its simplest case, it can be set up to cover every payphone in your database. You can define multiple commission plans for a Contract, and they will be calculated in the order you define them.

The next few paragraphs illustrate the Commission Plan schedule, its basis, and its use to calculate commission amounts.

An example of this Plan's commission structure is:

> *I pay the site owner 15% of the net coin if the net is between $75 and $150. If the net is between $150 and $250, I pay 20%. If the net is between $250 and $350, I pay 25%. If the net is over $350, I pay 30%. I also have to pay gross receipt taxes of 1% to the state. I do not want to pay site commissions on taxes that I have to pay. I also pay a flat 20% of my OSP revenues to the site.*

The following steps break up this commission plan example so you can understand its components.

<u>First</u>. <u>Commission Calculation Description</u>.

> *I pay the site owner 15% of the net coin if the net is between $75 and $150. If the net is between $150 and $250, I pay 20%. If the net is between $250 and $350, I pay 25%. If the net is over $350, I pay 30%.*
>
> *The amount calculated from this is assigned to the Site Commission Account.*

Commissions are based on the net amount you receive from the phone (after you pay the phone bill). To calculate the commission to be paid, all you need to do is perform two steps:

Step 1. From the commission rate schedule in the following table, determine between which low and high amounts the net amount you received is located.

For example, if the net amount you received is $80.00, this amount falls between $75.01 and $150.00 in the schedule.

Low Amount	High Amount	Dollar Amount	Percent Payment
$0.00	$75.00	$0.00	0% of total
$75.01	$150.00	$11.25	15% of total amount if a $75.00 threshold is met.
$150.01	$250.00	$30.00	20% of total amount if a $150.00 threshold is met.
$250.01	$350.00	$62.50	25% of total amount if a $250.00 threshold is met.
$350.01	$9,999,999.00	$105.00	30% of total amount if a $350.00 threshold is met.

Step 2. Once you know where in the schedule the net amount falls, use the following formula to calculate the commission.

[(Net Amount Received - Low Amount in table)Percentage Payment] + Dollar Amount

For example, if your net amount received is $80, calculate the commission as follows:

*[(80 - 75) * .15] + 11.25 = $12.00 commission[1]*

Following is another example:

If you received a net amount of $300, calculate the commission as follows:

*[(300 - 250) * .25] + 62.50 = $75.00 commission*

---

1.   This calculation is shown in rounded numbers, as the low amount to subtract is $75.01. However, PNM Plus will round up the resulting number (e.g., $3.00, not $2.998).

Second. **Create a New Plan from the Commission Plans screen by clicking on the New Plan button.**

See Section 9.6.1.1, *Creating a Commission Plan*.

In the **COMMISSION PLAN MAINTENANCE** screen, a Commission Plan named *Net Coin by Levels* is created (see Figure 9-25).

Figure 9-25

The calculated commission amount is assigned to the Site Commissions account code.

The Plan Type is *Average per site* - where all selected accounting entries for all phones at the site are averaged and that average value is used for comparison in the Rate Schedule table.

The values in the table from the first step are entered in the Commission Rate Schedule.

Note: *Percentage amounts are entered in numbers less than 1 (e.g., 30% is entered as 0.3). Note that the Low Amount and High Amount match those in the table in the first step. The dollar amount entered on each row is the percentage at that row times the low amount. For instance, for the $75.01-$150 range, the dollar amount is calculated as $75.01 * 15% = $11.25.*

Third. **Establish basis for the calculation of the Commission Plan.**

See Section 9.6.1.1, *Creating a Commission Plan*.

You use this screen to establish the account codes used to calculate the commission amount, as shown in Figure 9-26. As described, the net coin is calculated by determining the difference between coin collection and the phone bills paid.

Figure 9-26

Fourth. **Establish the commission plan to create the OSP revenue commission**.

Create another plan to calculate OSP Revenue. This commission satisfies the following commission structure:

> *Pay a flat 20% of the OSP revenue.*
>
> *The amount calculated from this is assigned to the Site Commission Account.*

This commission structure calculation follows this formula:

OSP Amount Low	OSP Amount High	Dollars	Percent Payment
$0.00	$99,999.00	$0.00	20%

Fifth.   **To create this plan, click on the New Plan button from the Commission Plans screen (see Figure 9-20).**

Figure 9-27 illustrates the commission rate schedule for 20% Flat OSP revenue.

Note: *Do not forget to use the **ASSIGN COMMISSION CALCULATION TO ACCOUNT** drop down list to select the account to be assigned the commission calculation.*
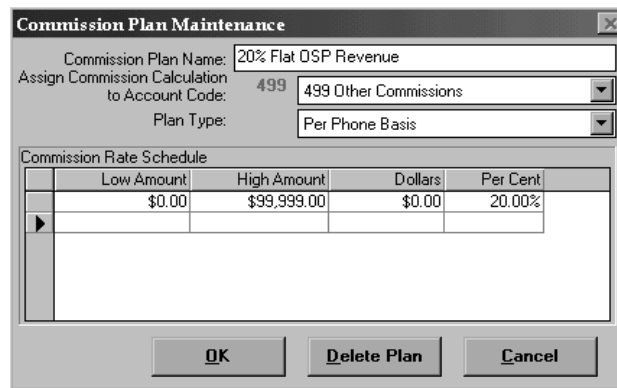
Figure 9-27

Sixth. **Establish the basis for the commission plan calculation**.

Figure 9-28 depicts the commission plan account basis used to calculate the commission amount on the basis of the total OSP revenue.
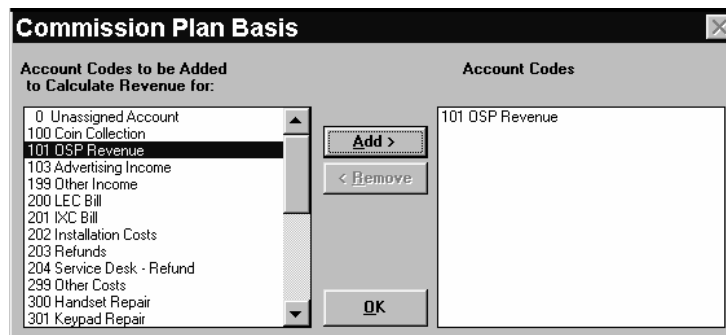
Figure 9-28

Seventh.   Establish the commission plan to the 1% State Tax.

Following steps one through six, develop the commission plan structure and its basis as outlined below.

Pay gross receipt taxes of 1% to the state.

...The amount calculated from this is assigned to the State Taxes Accounting Code.

Gross Amount Low	Gross Amount High	Dollars	Percent Payment
$0.00	$99,999.00	$0.00	1%

For example, the PNM Plus Contract commission calculation is performed as follows:

If the gross revenue was $500.00, then the owed State Taxes is $5.00 (one percent), as calculated below:

*((500 - 0) * .01) +0.00 = $5.00*

Since this example calls for not paying site commissions on paid taxes, the entries just calculated for the State Taxes accounting code are used to determine the value to process against the Net Coin by Levels commission plan.

The new Commission Plan schedule, as shown in Figure 9-29, contains the description, formulas, and assignment of the State Tax amount due.

Note: *Do not forget to use the **ASSIGN COMMISSION CALCULATION TO ACCOUNT** drop down list to select the account to be assigned the commission calculation.*
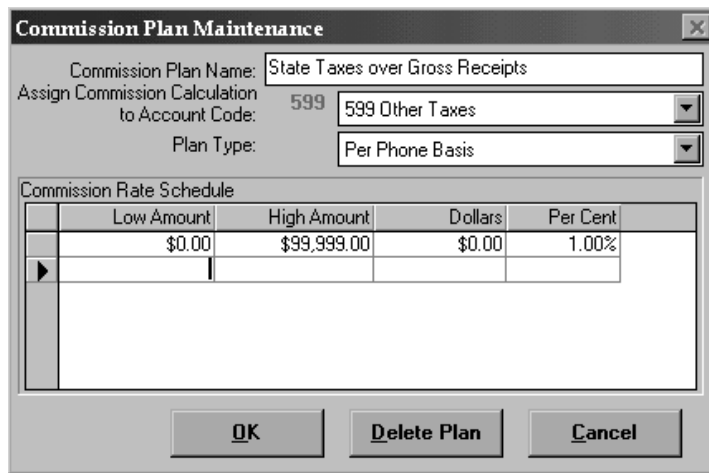
Figure 9-29

You can obtain the gross income used to calculate the state taxes by adding all income and revenue generated by the phones at the site. In the example shown in Figure 9-30, the gross revenue equals coin collection plus OSP revenue. Other sources of income, such as advertising income, can also be added to the account code basis for this plan.
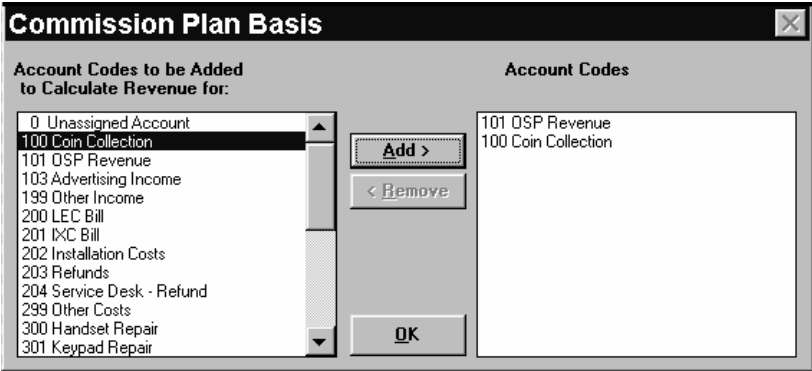
Figure 9-30

Eighth. These commission plans can be assigned to a Contract.

In the example we are building, the *PNM Plus Contract* uses the State Taxes to calculate taxes owed to the states first, then the Net Coin by level commissions to the site owner. When that calculation is completed, it calculates the commissions based on the OSP Revenue.

During the commission calculation, the order in which the plans are assigned to the contract is followed to calculate commission amounts due. When multiple commission plans are processed for a Contract, the output from the first calculation can be used as input to the processing for the second and subsequent plans.

You can assign the described commission plans to the *PNM Plus Contract* from the **COMMISSION PLANS** screen (see Figure 9-31). You must sequence the commission plans in the order you want the commission calculation to be performed. As stated earlier, for this example we want the State Taxes to be calculated before the Net Coin by Levels and the 20% Flat OSP Revenue.
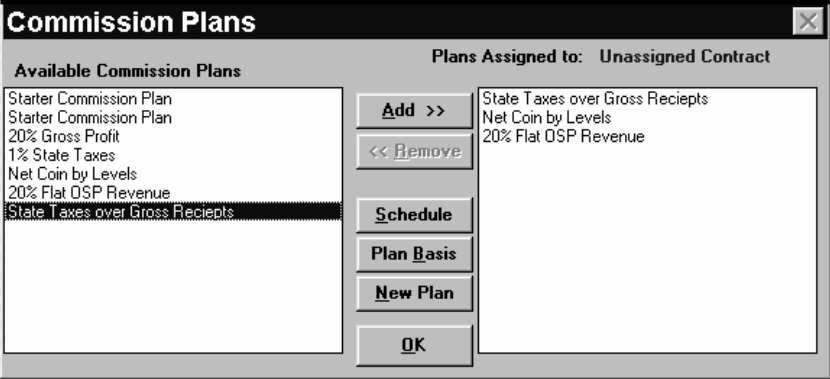
Figure 9-31

Ninth. **Subtract the State Tax amount from the Net Coin by Level or from the 20% Flat OSP Revenue amount.**

All commission calculations yield a negative number, which represents the total amount of money to pay. To subtract the calculated State Tax amount from the Net Coin or OSP revenue amount, you must:

Step 1. Select the plan and click on **PLAN BASIS**.

Step 2. Add the State tax account code to the basis for the commission calculation

Tenth. **Perform the Commission Calculation**

To perform the commission calculation, you first need to perform the following steps to select the contract for which the commission amounts will be calculated.

From the **OPERATOR CONSOLE** screen:

1	Click on the **BUSINESS ADMINISTRATION** icon.	The **BUSINESS ADMINISTRATION MENU** appears. *Figure 9-1*.
2	Click on **4** (Commission Calculation).	The **COMMISSION CALCULATION CONTROLS** screen appears. *Figure 9-32*.
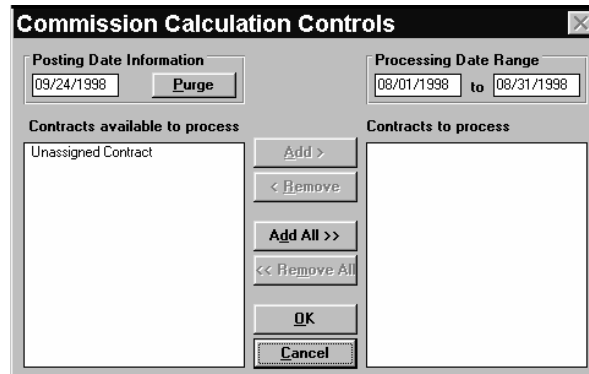
Figure 9-32

Through the **COMMISSION CALCULATION CONTROLS** screen, you can define the date range to be used to calculate the commission revenue. In addition, you can add Contracts to the list of Contracts to process. The date the Commission Calculation takes place is saved as the Posting Date.

3	In the **PROCESSING DATE RANGE** fields, enter the date range to use for the calculation.	Commission calculations can be performed on a monthly, quarterly, biannual, or annual basis. For this example, we will calculate the taxes and commission due for the third fiscal quarter (7/1 through 9/30, inclusive).
4	Enter the posted date in this screen's **POSTING DATE INFORMATION** field.	This is the date that is stamped to the calculated commission amount. For this example, the posted date is 9/30, as we want the calculated State Tax to be used for the calculation of the Net Coin by Level and 20% Flat OSP Revenue amounts.

5	Select and **ADD** the contract in the **CONTRACTS AVAILABLE TO PROCESS** list box for which the commission amounts will be calculated.	For this example, select and add the *White House Contract*. The contract moves to the **CONTRACTS TO PROCESS** list box.
		Note: *You can also add all contracts to the **CONTRACTS TO PROCESS** list box by clicking on **ADD ALL**. You can remove a contract from the **CONTRACTS TO PROCESS** list box by clicking on it and then clicking on **REMOVE**. You can remove all contracts from the **CONTRACTS TO PROCESS** list box by clicking on **REMOVE ALL**.*
6	Click on **OK**.	The **COMMISSION PROCESSING** screen updates you on the progress of the commission calculation. *Figure 9-33*.
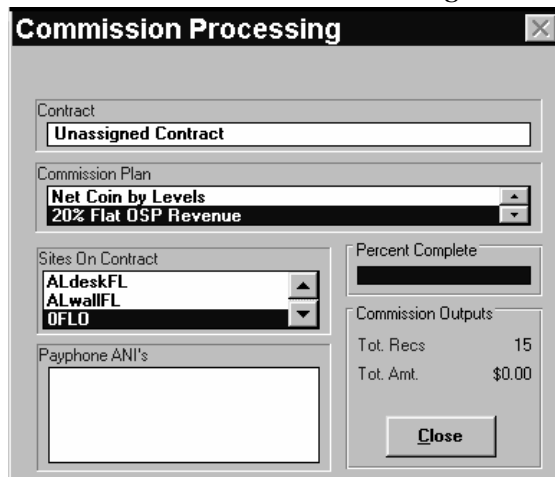
Figure 9-33

7	When the commission calculation is complete, click on **CLOSE**.	Returns the **PNM PLUS OPERATOR CONSOLE** screen's **MAIN MENU**. *Figure 3-1.*

During commissions calculations, each journal entry is examined to make sure it should be used for the plan being processed based on its account code.

During processing, PNM Plus calculates the value of all accounting journal entries selected in the plan basis for each payphone. For example, if a payphone has $400 in coin revenue and $230 in phone bills, the calculated net is $170. If a payphone has more expenses than income, the net is a negative number and no commission is calculated.

During commission processing, the calculated net is compared to the commission rate schedule in the table displayed in the first step in this procedure (Commission Calculation Description) and in Figure 9-25. As discussed in this first step, PNM Plus then looks for a match within the low and high amounts defined. If no match is found, no commission is calculated. If a match is found, the commission is calculated according to the following formula:

[(Net Amount Received - Low Amount in table) percentage payment] + Dollar Amount

For example, if the coin revenue was $400, the phone bills were $230, and the tax paid was $5.00, the net is $165.00. Based on the commission rate schedule, the total site commission due is calculated at 20%. The calculation is performed by subtracting $150.00 from $165.00, multiplying it by 20%, and then adding $30.00 to the total (i.e., $3.00) to get $33.00, as shown in the following formula:

*[($165 - $150) * 0.20] + $30 = $33.00*

Using the numbers shown in Figure 9-25, if you assume an individual payphone using this plan has a calculated net (expenses plus income) as shown, the commission is:

Net	Formula	Commission
$50	[($0 - $0)*0%] + $0	$0.00
$125.00	[($125 - $75)*15%] +$11.25	$18.75
$250.00	[($250 - $150)*20%] +$30.00	$50.00

Note: You also calculate the 20% of OSP Revenue using this method.

Eleventh. Review the Cost Accounting Journal.

From the **BUSINESS ADMINISTRATION MENU**, click on **3** (Cost Accounting). For each phone at the site, there should be three amounts posted (dated 9/30): a State Tax, a Site Commission calculated for the Net Coin by Levels, and a second Site Commission calculated for the Flat OSP Revenue.

Another Example:

You can also use the commissions processing facility to summarize other accounting journal entries. Imagine that you had a need to quickly determine the costs associated with faults reported to you that were not hardware related. (Maybe you have defined account codes similar to the ones used in this example.) You can run commissions processing and examine the resulting records produced under account *0 - Unassigned Account* to see the resulting costs to you.

You can examine the output using the **COST ACCOUNTING JOURNAL** screen, which also gives you the ability to summarize counts and amounts for the selected records.

Note: *If you use this facility, you might also be calculating commissions, so take care to purge the resulting records from your accounting journal. An easy way to do this is to set the date of the output record to some future date, such as 12/31/2099, and after you have analyzed the results you want, purge all records in the date range of 12/31/2099 to 12/31/2099.*

APPENDIX A. CONVERTING FROM PNM TO PNM PLUS

If you are currently using PNM and now want to use PNM Plus, you need to convert your PNM database into a PNM Plus database. The following section explains the differences between PNM and PNM Plus, and is followed by instructions on how to convert your database.

Note: *In order to upgrade from PNM to PNM Plus you must be running PNM version 2.2.1 or higher.*

A.1   How PNM Plus differs from PNM

If you are familiar with PNM, Elcotel's DOS-based payphone management system, you will find many of the familiar PNM functions in PNM Plus. You will also find major new features that will enhance your ability to manage your network. The new functions and enhancements provided by PNM Plus include:

- A graphical Microsoft Windows-based user interface.
- Simplified user interface for basic functions including entry of phone information and rate editing.
- Increased help support, including provision of step-by-step instructions for setup of phone information, downloading of phones, and establishment of poll lists to assist new and novice users.
- Concurrent polling of multiple payphones.
- Work Order facilities to permit recording and tracking of problems.
- Ability of multiple users to concurrently access and use the system on a Local Area Network.
- Automatically track changes in cashbox amounts in remote phones.
- Support for describing route and site information associated with the phones.
- Support for recording and tracking both expenses and revenues associated with payphones.
- Ability to enter contractual information and define commission schedules.
- Ability to calculate commission payments for your phones.

A.2   Converting Existing PNM Databases

If you are a current user of Elcotel's PNM and FACTS programs, PNM Plus provides you with an automated conversion process. This process lets you switch your data from its present PNM and FACTS database formats to the PNM Plus database.

The following figure provides an overview of what happens during the conversion process:
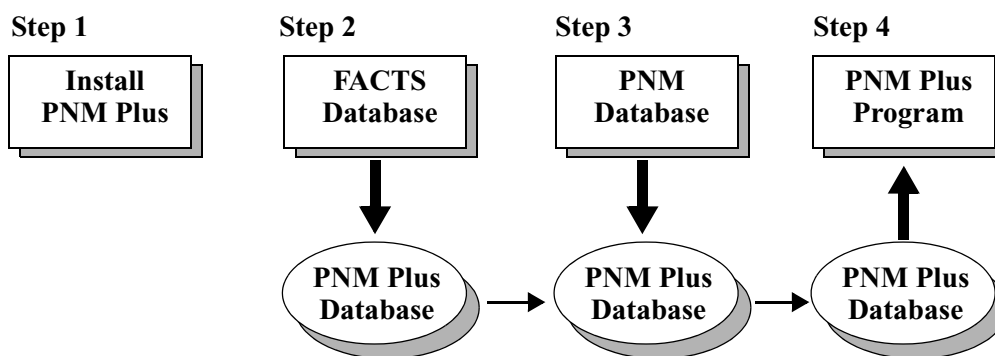
These steps are explained below:

1. Install PNM Plus according to the instructions in Chapter 2.
2. The FACTS data is converted to the new PNM Plus database.

>   **Note:**   *If you are not using FACTS, Step 1 is skipped.*

3. Updates to that database are then applied from data kept in PNM.

4. You use the new PNM Plus software to look at your converted data and make sure your PNM and FACTS information was converted correctly into PNM Plus.

You can perform the conversion process as many times as you want. Elcotel recommends that you make a couple of practice runs. You can do this while still continuing to operate your payphones using the present PNM software. When you are confident that the process will work for you, run the conversion process and begin using PNM Plus to manage your business.

The conversion process consists of the following tasks:

1. Creating a conversion directory where you will run the conversion
2. Copying the conversion utility provided by Elcotel into the conversion directory
3. Running the conversion program
   a. Copying data from FACTS, PNM, and Rates databases, reformatting it, and relocating it into the conversion directory
   b. Reading the reformatted FACTS, PNM, and Rates data records and building the PNM plus database
4. Reviewing the converted database to evaluate the success of the conversion
5. Configuring PNM Plus to operate in your system environment
6. Setting the commands and schedule for each of your converted poll lists

When you create the conversion directory, Elcotel recommends that you use a DOS directory named *C:\LETOCLE* (Elcotel spelled backwards). If you already have a directory in use by that name, you can choose another name. If you run the conversion process several times, you should erase the whole directory. It is best not to intermingle conversion data with other files you might have in the same directory.

A.2.1 CONVERT A PNM DATABASE TO PNM PLUS USING WINDOWS 95, 98, OR NT

If you have purchased a new computer for your PNM Plus program, you must install your original version of PNM on your new computer. This is required for conversion of your PNM database to a format that can be used by PNM Plus. You will need the original PNM Installation disks. Copy all existing PNM and FACTS data files from your existing computer to identical directories and subdirectories on your new computer using the PNM Backup Utility as described in steps 2 and 3 below.

When installing PNM Plus on your existing PNM computer, skip to step 4.

1	Install PNM on your new computer.	Enter the following on your new Windows computer:
		a) Click on the **START** icon.
		b) Click on **PROGRAMS.**
		c) Click on **MS DOS PROMPT.**
		d) Enter **MD PNM** to create the PNM directory.
		e) Enter **CD PNM** to change to the new directory.
		f) Insert PNM Installation diskette "1" into disk drive A or B
		g) Enter **A:** or **B:** to switch to the drive containing the installation disk.
		h) Enter **INSTALL.**
		Follow the on screen instructions for installing PNM.
2	Run the Backup Utility on your old computer.	Assuming you are using PNM version 2.2.3, from the PNM Main Menu:
		a) Select **6** for Utilities.
		b) Select **3** for Backup & Restore.
		c) Select **B** for Backup.
		d) Select **A** for All of the Above.
		e) Insert a new formatted diskette and follow the on screen instructions.
3	Run the Restore Utility on your new computer.	From the PNM Main Menu:
		a) Select **6** for Utilities
		b) Select **3** for Backup & Restore
		c) Select **R** for Restore
		d) Insert the diskette from step 2 and proceed with on screen instructions
		When the Restore Utility has finished, you are ready to begin the conversion process. Exit the PNM program. Exit the MS DOS Prompt program.

Note: *In the following series of instructions, LETOCLE is used as the name of the conversion directory. If you are using a different name, use that name instead of LETOCLE in the instructions*

.

4	Start the Windows Explorer program.	a) Click on the **START** icon.
		b) Click on **PROGRAMS**.
		c) Click on **WINDOWS EXPLORER**.
5	Create a directory for the conversion process.	In the Windows Explorer program:
		a) Click on the main directory folder marked **c:** .
		b) Click on the word **FILE** on the toolbar to bring down the file options
		c) Click on **NEW**.
		d) Click on **FOLDER**.
		e) Enter **LETOCLE** to rename the folder.
		Note: *If you have previously run the conversion program, delete all files from the conversion directory:*
6	Insert the first conversion utility diskette or the installation CD into the appropriate drive.	If you are using diskettes to install PNM Plus, the conversion utility is on diskettes that are labeled **ELCOTEL PNM TO PNM PLUS CONVERSION**. If you are using a CD to install PNM Plus, the conversion utility is on the CD in a subdirectory called **CONVERT**.
7	Copy the files from the conversion utility disk to the new directory.	In the Windows Explorer program:
		a) Click on the source drive representing the location of the installation disk.
		b) If you are using a CD to install, click on the **CONVERT** subdirectory.
		c) Click and drag all files from the conversion utility disk to the *C:\LETOCLE* folder.
		d) Confirm that you are copying files to *C:\LETOCLE* by clicking on **YES**.
		If you are using diskettes, repeat this step for each conversion utility diskette.
8	Verify that all files have been copied.	The following files should have been copied:
		• CCVT.EXE
		• CONVERT.BAT
		• CONVERT.MDB
		• DEF_53X.C94
		• PNM2PLUS.EXE
		• SPL08.EXE
9	Remove the disk from your disk drive and put it with your other PNM Plus installation disks.	

10	Start the Windows MS DOS Prompt.	a) Click on the **START** icon. b) Click on **PROGRAMS.** c) Click on **MS DOS PROMPT.**
11	Start the **CONVERT** program.	a) Enter **CD \LETOCLE** to get to the conversion directory. b) Enter **CONVERT** to start the conversion process. You are prompted to enter the current directory where your FACTS, PNM, and Rates files are located.
12	When prompted, enter the directories where your FACTS, PNM, and Rates files are located.	**Note:** *If you are not using FACTS, erase the FACTS directory path. PNM and Rates directories are mandatory.* If your files are located in the default directory that appears in the prompt, press **<Enter>**. Your FACTS, PNM, and Rates data files are reformatted and transferred to your conversion directory (i.e*.,* **C:\LETOCLE**). A new screen displays the progress of the transfer. When the transfer is complete, the first screen (the one with the file location prompts) returns with an **<Esc>** prompt.
13	Press **<Esc>** when prompted.	The DOS portion of conversion has finished. The remainder of the program will run under Windows. Convert will start Windows for you.
14	Enter the DOS path in the text box at the bottom of the PNM Plus Conversion screen, or click on **OK** if the proper directory name already appears.	The **PNM PLUS CONVERSION** screen prompts for the DOS path where the data is located. ***Figure A-1*** *Figure A-1* This screen configures the conversion program to use the correct DOS directory for the converted PNM Plus database. The DOS path you enter at this screen *must match the directory where you have loaded the conversion utility (i.e.,* **C:\LETOCLE**).
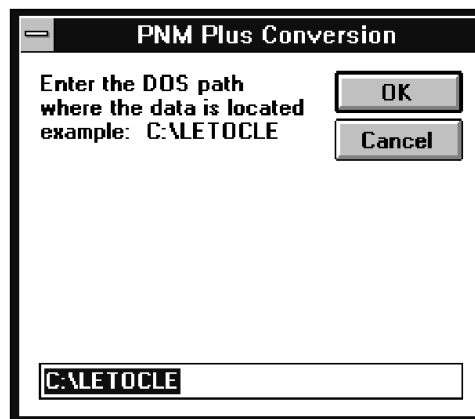
15	In the text box, enter the 3-digit NPA (area code) for your local calling area and then click on **OK** to accept your entry.

The **PNM PLUS CONVERSION** screen prompts for the default local NPA. *Figure A-2*.
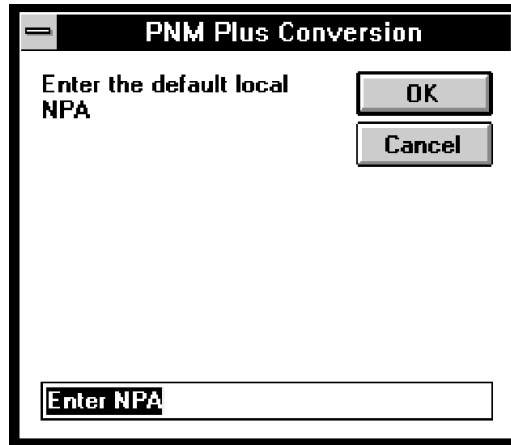
Figure A-2

This is the NPA to use for any 7-digit payphone telephone numbers you have previously entered in the system.

Note: *PNM did not require a full 10-digit ANI be specified, but PNM Plus does.*

16	Verify the Control Selection and click on **BEGIN**.

After you enter the information in the previous PNM Plus Conversion screens, the **PNM PLUS FILE CONVERSION PROGRAM** screen appears. Verify that convert has set the control properly for whether or not you use FACTS. Figure A-3 shows an example of this screen as it might appear at the start of the conversion run.
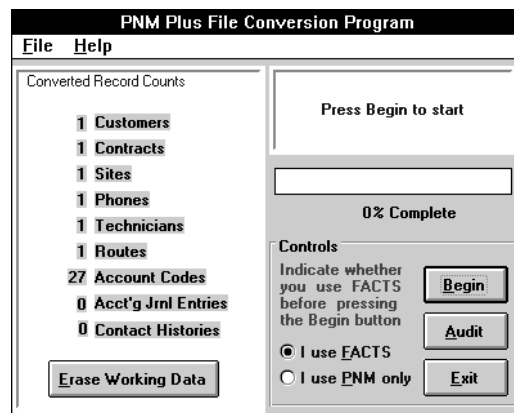
Figure A-3

Note: *Select **FILE-EXIT** from the menu bar to exit the conversion program. You can select **HELP-ABOUT** from the menu bar to display the version of the conversion program you are running.*

The conversion program imports the reformatted FACTS and PNM data records and builds the PNM Plus database. This part of the conversion program happens inside the MS Windows environment.

While the conversion is in progress, the status window in the upper right corner of the screen lets you know which file the program is converting. If you have large data files with many records that must be converted, the percentage completed bar enables you to gauge how far and how fast the current file is being converted. The window at the bottom of the screen shows you how far the entire conversion process has progressed.

The conversion program can run for a long time depending on the amount of information to be converted from FACTS and PNM into PNM Plus. Conversion of Accounting and Contact History information (MNC and ALR files) is particularly time consuming. The size of these files, as well as the processor and disk speed of your system, determines how long the conversion process runs.

When the conversion run is completed, a screen similar to the following appears. **Figure A-4**.
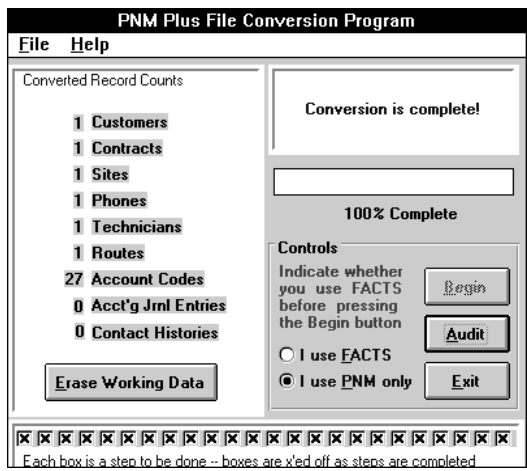
Figure A-4

The status box in the upper right corner tells you the conversion is complete. Record counts are listed at the left side of the screen.

17	To view a report of discrepancies, if any, click on **AUDIT**.	A screen similar to the following appears. *Figure A-5.*
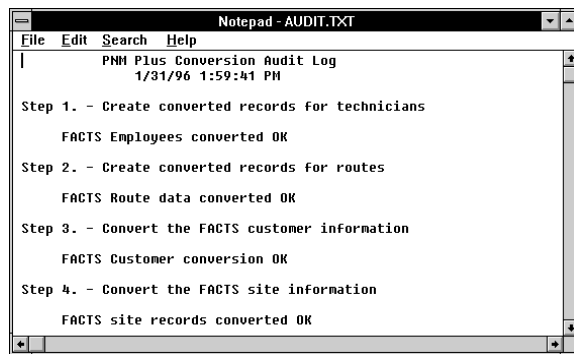
Figure A-5

18	Select **FILE -- EXIT**.	Returns the **PNM PLUS FILE CONVERSION PROGRAM** screen. *Figure A-4.*
19	Select **EXIT**.	Closes the Conversion program. Your database is now converted to the PNM Plus format. You now need to Upgrade the database to the latest version. Go to Section B.7, *Upgrading PNM Plus Databases* for upgrade instructions.
20	Configure the PNM Plus database.	See Section 7.3.1, *Setting the Database Location*, for instructions on using this screen (*Figure A-6*). Set the database location to *C:\LETOCLE\CONVERT.MDB.*
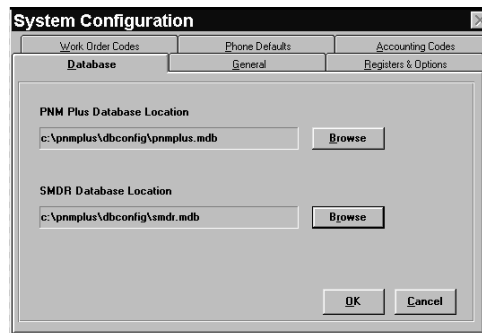
Figure A-6

21	Review the converted database to evaluate the success of your conversion.	Since the conversion program cannot convert every field in your PNM and FACTS system into PNM Plus, you need to verify how your data was converted into PNM Plus. At a minimum, you should check the following:

• Phone Detail information (PNM and FACTS)

• Site information (FACTS)

• Route information (FACTS)

• Accounting information (FACTS)

22	Configure PNM Plus to operate in your system environment.	This task requires you to configure the communication ports and modem initialization strings in the Operator Console and Poll Manager that are required to communicate with your phones. See Chapter 8, *Managing Payphone Configuration*, for information on configuring your phones.
23	Set the commands and schedule for each of your converted poll lists.	Since the Poll Lists in PNM Plus are different from the dial lists in PNM, review your Poll Lists and, if necessary, revise the number and type of lists you maintain. See Section 5.1, *Poll List Maintenance*, for information on setting up a poll list.
24	Redirect the PNM Plus configuration to locate the database.	See Section 7.3.1, *Setting the Database Location*, for instructions. The **PNM PLUS DATABASE LOCATION** for normal operation is *C:\PNMPLUS\DBCONFIG\PNMPLUS.MDB*
25	After you have completed your testing of the converted data and are ready to move your files into production with PNM Plus, perform the following procedure.	CAUTION: The following procedure applies only if you are converting a single PNM and FACTS database to PNM Plus. **If you already have converted PNM data and are running in production with PNM Plus, do NOT do this procedure**. If you do, you will overwrite the contents of your PNM Plus database with the new data. If you are already running PNM Plus, you must use the Elcotel PNM Plus Merge Utility to merge the newly converted data with the existing data in your PNM Plus database. See Section B.8, *Phone Acquisition Merge Utility*. From the Windows Explorer program, do the following to move your data into production: a) Click on the *LETOCLE* directory. b) Click on the file named *CONVERT.MDB.* c) Click on the word **FILE** on the toolbar to bring down the file options. d) Click on **RENAME.** e) Enter *PNMPLUS.MDB* and click on **OK.** f) Click and drag this file into the *C:\PNMPLUS\DBCONFIG* subdirectory. Click **OK** to replace existing file.

Your PNM database is now ready for PNM Plus. You may want to delete the LETOCLE directory as well as your PNM and FACTS files to free up space on your computer. Before deleting the old database, Elcotel recommends that you make a backup to your new database. Use your operating system's backup utility for best results.

A.3 Reviewing Contents of Converted Databases

After conversion of your PNM and FACTS information, you need to review the resulting PNM Plus database to ensure your information was correctly converted. If there are problems or you want the data to be converted differently, you can modify the FACTS and PNM databases and start the conversion process again.

If you use only PNM (not FACTS), you will note many new categories of information in PNM Plus, including Sites, Routes, Technicians, Contracts, Customers, and Accounting information that was not present in PNM. Your review of the database should focus on Sites, Phones, and register and option information.

If you are a FACTS user, you will note many familiar categories of information in PNM Plus; however, PNM Plus introduces the Contract category to describe commission calculation information for sites. You need to review Technicians, Routes, Sites, Customers, Phones, and register and option information to ensure your FACTS information was converted correctly. Since the contract category is new in PNM Plus, the commission formulas in FACTS were not converted and must be re-entered. You also need to review the contract information, reassign sites to contracts, and delete extra contracts where necessary.

The following tables describe how the information categories in PNM Plus were created during the conversion process.

A.3.1 PHONES

If you use only PNM:

The information maintained in the Phone Master file (Chat.dat) is converted into PNM Plus as follows:

Table A-1

PNM information from the PHONE MASTER file (Chat.dat)	Can be viewed in PNM Plus in the PHONE DETAIL window as:
Model	Phone Model
Version	Pgm Version
Phone Number	Phone ANI **Note:** *Dial string prefixes are separated from the phone's ANI and displayed in the Prefix field on the Site window.*
ID Number	Phone ID
New ID	New Phone ID
PNM Password	Password
New PW	New Password
Bypass Code	Bypass
Variables 1,2 or 3	Phone Variables 1, 2 or 3
Rate Module File	Rates
Registers/Options	RegOpt
Priority Parsing	PriPar
Speed Dial file	Speed

Table A-1

PNM information from the PHONE MASTER file (Chat.dat)	Can be viewed in PNM Plus in the PHONE DETAIL window as:
Program file	Program
Voice brand file	Voice
Date Installed	Installed
Set Totalizer	Not converted (you can reset the Totalizer in PNM Plus by creating a command in the phone's NEXT CONTACT command window)
	The following fields can be viewed on the SITE window of PNM Plus
Street Address	Address
Time Zone	Time Zone
Location Name	Site Name
	The following fields can be viewed on the REGISTERS AND OPTIONS window for the phone.
1+ IXC Auth Code	Register 311
0+ OSP Auth Code 1	Register 320
0+ OSP Aux Auth 1	Register 321
0+ OSP Auth Code 2	Register 323
0+ OSP Aux Auth 2	Register 324
Spare Auth #1	Register 326
Spare Auth #2	Register 327
Blind Period	Register 500
Volume Control	Register 501

If you use PNM and FACTS:

In addition to the preceding PNM Phone Master information, the Phone information maintained in FACTS is converted as follows:

Table A-2

FACTS information from the PHONE file	Can be viewed in PNM Plus in the PHONE DETAIL window as:
ANI	ANI
Phone ID	Phone ID
Description	Location Description information is also used with Site name to describe the phone on numerous windows, including Navigation, Work Orders Accounting Journal, Poll Lists,...

Table A-2

FACTS information from the PHONE file	Can be viewed in PNM Plus in the PHONE DETAIL window as:
Site ID	Relationship established in FACTS between the phone and site is maintained in PNM Plus; however, the FACTS site number is reassigned within PNM Plus.
Upper Key	Upper Key
Lower Key	Lower Key
Serial Number	Serial Number
Type	Group Code
First Call	Not used (established in contact history)
Last Call	Not used (established in contact history)
Notes	Notes

A.3.2 SYSTEM OPTIONS AND POLL LISTS

If you use only PNM or if you use PNM and FACTS:

Many of the system options including Poll Lists were converted from PNM as follows:

Table A-3

PNM information from the SYSTEM OPTIONS file (chat.opt)	Can be viewed in PNM Plus in the POLL LIST window as:
Dial List Names	Name
Dial List Schedules	Not converted (you must enter the poll list schedules in PNM Plus)
Download Commands	Not converted (you must set up the command list in PNM Plus)
Phone assignments	Phone list
	Can be viewed in PNM Plus in the SYSTEM CONFIGURATION window as:
Company Name	Your Company Name
Phone User Variables	Phone Variable Names
Path to Rate Files	Not converted (rate files must be in the same location as the phone database in PNM Plus)
Comm Port Number	Not converted (you can set the interactive phone dialup port using the Dial Payphone/ Modem Communications Setting/ Comm Port field)
Modem Setup	Not converted (you can set up the modem configuration using the Dial Payphone/ Modem Communications Setting/ Init String field)

A.3.3 REGISTERS AND OPTIONS

If you use only PNM or if you use PNM and FACTS:

PNM Plus maintains a unique set of Register and Option assignments for each phone in the database. In addition, PNM Plus maintains Register and Option templates that can be copied to a phone instead of setting each Registers and Options value.

During conversion, each PNM Register and Option file (C94 file) is converted into a template in PNM Plus. The Registers and Options for a phone converted from PNM are *set like* the template associated with the C94 file assigned to the phone. Site specific information for the phone in PNM is converted into the appropriate register value in the phone's Registers and Options values.

You can check the Register and Option assignments by clicking on REGOPT in the PHONE DETAIL screen.

When you change a template, NO PHONES ARE AFFECTED.

PNM site specific information in the Phone master record is converted to PNM Plus as follows:

Table A-4

PNM information from the PNM PHONE file (Chat.dat)	Can be viewed in PNM Plus in the REGISTER AND OPTIONS window as:
1+ IXC Auth Code 1	Register 311
0+ OSP Auth Code 1	Register 320
0+ OSP Aux Auth Code 1	Register 321
0+ OSP Auth Code 2	Register 323
0+ OSP Aux Auth Code 2	Register 324
Spare Auth #1	Register 326
Spare Auth #2	Register 327
Blind Period	Register 500
Volume Gain	Register 501

A.3.4 MACROS

If you use PNM only or if you use PNM and FACTS:

User defined macros are copied from the PNM Registers and Options files during conversion and are stored in the PNM Plus database. Each user defined macro is viewed and edited with the Macro editor located in the **CONFIGURATION** menu.

You can review each macro to ensure it was converted correctly. Converted macros are described as *converted* user macros, and the macro's description includes its first 10 commands to assist you in recognizing it.

The assignment of user defined macros to registers 300-305 was maintained during the conversion. You can check the phone's Macro assignment by selecting **REGISTERS AND OPTIONS** from the **PHONE DETAIL** screen and then clicking on **MACRO**.

A.3.5 SITES

If you use only PNM:

This is a new category. The PNM Plus database contains one site for each phone in your database. The Site table that is created contains the site name, dialing pattern, dialing prefix, and time zone. You can enter additional information in this table that is new to PNM Plus if you want to take full advantage of PNM Plus.

The Sites information maintained in FACTS was converted into PNM Plus as follows:

Table A-5

FACTS information from the SITE file	Can be viewed in PNM Plus in the SITE window as:
Site Number	Not used. PNM Plus assigns this number internally.
Route ID	Relationship established in FACTS is maintained, but in PNM Plus, the Route Description appears.
Site Name	Location Site Name is also used in contract description to identify the contract established for this site.
Address Line 1	Address Line 1
Address Line 2	Address Line 2
Address Line 3	City, State, ZIP
Contract Date	Start and end date for the site's contract.
Contact Name	Contact
Business Phone	Phone
Commission Code	Not used. Commission formulas must be reentered for each contract.
Tax Code	Not used.
Customer Number	Used to establish relationship between customer and contract established for this site.
Account Number	Site variable #1
Map Coordinates	Map Coordinates

A.3.6 ROUTES

If you use only PNM:

This is a new category. The PNM Plus database contains only the Unassigned routes.

If you use PNM and FACTS:

The Route information maintained in FACTS was converted to Route information in PNM Plus as follows:

Table A-6

FACTS information from the ROUTE file	Can be viewed in PNM Plus in the ROUTE window as:
Route Number	Not Used. PNM Plus assigns this number internally.
Description	FACTS Route Number and Description are combined into the PNM Plus Description field.
Employee Number	PNM Plus displays the Technician Name.

A.3.7 TECHNICIANS

If you use only PNM:

This is a new information category. The PNM Plus database contains only the Unassigned technicians.

If you use PNM and FACTS:

The Employee information maintained in FACTS was converted into PNM Plus. The information can be checked as follows:

Table A-7

FACTS information from the EMPLOYEE file	Can be viewed in PNM Plus in the TECHNICIAN window as:
Employee Number	Not used. PNM Plus assigns this number.
Name	Name
Address 1	Address 1
Address 2	Address 2
Address 3	City, State ZIP
Phone	Business Phone
FAX Number	FAX Phone

A.3.8 CONTRACTS

If you use only PNM:

This is a new information category. Only one contract was created (the Unassigned contract), and all sites were assigned to this contract.

If you use PNM and FACTS:

This is a new information category. One contract per site was created in the PNM Plus database. You might want to rearrange the contracts to accurately reflect the sites associated with an individual contract.

A.3.9 COMMISSION CALCULATIONS

If you use only PNM:

This is a new information category. The PNM Plus database contains a sample commission plan as an example of how commission plans can be structured.

If you use PNM and FACTS:

Commission formulas maintained in FACTS were not converted into PNM Plus. You must re-enter any commission formulas and establish the basis for the calculation by identifying the account codes to be used during the commission calculation.

A.3.10 CUSTOMERS

If you use only PNM:

This is a new information category. There is only one customer in the database (the Unassigned customer), and all contracts are assigned to this customer.

If you use PNM and FACTS:

The Customer information maintained in FACTS was converted to PNM Plus. The Customer information can be viewed in PNM Plus as follows:

Table A-8

FACTS information from the CUSTOMER file	Can be viewed in PNM Plus in the CUSTOMER window as:
Customer Number	Not used. PNM Plus assigns this number internally.
Customer Name	Name
Address Line 1	Address Line 1
Address Line 2	Address Line 2
City	City, State ZIP
State	City, State ZIP
Contact	Contact
Phone	Phone
FAX Number	FAX Number

A.3.11 ACCOUNTING

If you use only PNM:

This is new in PNM Plus and no records are included in the database.

If you use PNM and FACTS:

Accounting information maintained in FACTS was converted into the Accounting Journal table in PNM Plus. The information was converted as follows:

Table A-9

FACTS information from the ACCOUNT MASTER file	Can be viewed in PNM Plus in the ACCOUNT ENTRY window as:
ANI	ANI
Date	Date
Code	Account Code
Cost	Amount
Employee Number	PNM Plus displays Technician Name
Notes	Notes

In addition, Account codes were converted from FACTS as follows:

Table A-10

FACTS information from the ACCOUNTING CODES file	Can be viewed in PNM Plus in the ACCOUNT CODES window as:
Code	Account Code
Name	Description
Cost	Cost

A.3.12 CONTACT HISTORY

If you use only PNM:

This is new in PNM Plus and no history was converted for your phones.

If you use PNM and FACTS:

The call counts and alarm information maintained by FACTS was converted to PNM Plus. The information can be viewed by clicking on **CALL HISTORY** after selecting a phone from the **FIND A PHONE**, **NAVIGATION**, or **PHONE MANAGEMENT** screens.

The following information was converted from FACTS to PNM Plus:

Table A-11

FACTS Information from COUNTER FILE	Can be viewed in PNM Plus in the CALL HISTORY window as:
ANI	ANI
Date/Time	Date/time
Local Coin	Local Coin
Other Coin	Other Coin
Zero Plus	Zero Plus
Zero Minus	Zero Minus
Dial Around	Dial Around
Other	Other

Table A-12

FACTS Information from the PHONE CONTACTS file:	Can be viewed in PNM Plus in the CONTACT HISTORY window for the phone as:
ANI	ANI
Date/time	Date/time
Cashbox	Cashbox Amount
Last Collect Amt	Last Collection Amount
Totalizer	Totalizer
Alarm codes	Alarm descriptions

A.3.13 SMDR

CAUTION: *Due to the size and time involved with the conversion, SMDR information was not converted by the conversion process. If this presents a problem, contact Elcotel for assistance.*

APPENDIX B. USING THE PNM PLUS UTILITIES

As introduced in Section 3.5, *PNM Plus Utilities*, the PNM Plus Utilities program enables you to perform system functions such as importing, exporting, backing up, restoring, purging, and cleaning up files, changing the ANI for a group of phones with the same ANI, upgrading databases, and merging databases. You perform these functions from the **PNM PLUS UTILITIES** screen's **MAIN MENU**.

Each icon in this menu represents a Utility function you can perform. Each of these functions is discussed in the following sections.

Note: *You can also select a Utility function by selecting it from the File menu located in the menu bar. To display on-line help, select **CONTENTS** from the Help menu located in the menu bar. To display the version number of your PNM Plus Utilities, select **ABOUT UTILITIES** from the Help menu.*

B.1 Importing Information into PNM Plus

As a PNM Plus user, you might have to import data from a variety of sources and in a variety of formats into PNM Plus. The **IMPORT** utility enables you to modify the file and data structure of ASCII-formatted source data to match the database format of PNM Plus. The **IMPORT** utility also enables you to quickly add data to your PNM Plus database without having to step through the PNM Plus screens.

Note: *The Import utility does not verify data completeness (as PNM Plus does) when you enter data. As a result, you might have to enter additional information using PNM Plus after you complete the Import.*

Imported data can be one of the following types:

- Payphone data (e.g., alarms, counters). The Import utility uses payphone data to create or update a payphone record.

- Accounting data (revenues and expenses) reported by long distance carriers and coin counters. The Import utility uses accounting data to create accounting records.

The Import utility can accept three types of ASCII-input record formats:

- A delimited text file with fields separated by quotes or commas

- A formatted text file with input fields that start at prescribed displacements and that contain constant widths

- A string of ASCII text data read from a serial or comm port, such as the data used with a coin counting machine

All Accounting Data imported files are read, reformatted, and displayed in a format similar to the Cost Accounting Journal display. The files are displayed for review prior to the actual import into PNM Plus. When the Import process begins, it edits the reformatted input records for the proper data values, tests the ANI to make sure it is in the database, and checks the entire record to make sure it is not a duplicate.

If all these tests are successful, the record is added to the system and the next input record is processed.

B.2 Importing Accounting Data

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **IMPORT** icon.	The **IMPORT MENU** appears and enables you to pick an import type from a list box. *Figure B-1*.
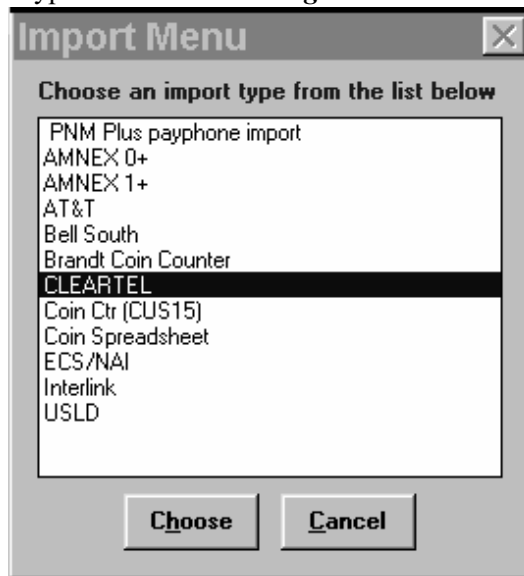
Figure B-1

The first selection in the list box, **PNM PLUS PAYPHONE IMPORT**, enables you to import payphone data (see Section B.2.1, *Importing Payphone Data*). All other selections enable you to import accounting data to the selected import type's account.

3	Select an import type containing accounting data.	

4	Click on **CHOOSE**.	An **IMPORT ACCOUNTING DATA** screen appears. This screen lets you specify the import criteria to be applied to the accounting data. Figure B-2 shows you an example of this screen.

Figure B-2

The screen includes accounting data check boxes and drop down lists for different types of import data to be processed. This list varies for each input type. At least one row of accounting data is always present and must be selected to import. The layout and the labels on the row (e.g., PIF AMOUNT, COMMISSION AMOUNT) come from the control file.

The drop down lists contain possible account codes that can be used for posting. The codes that display in these drop down lists contain an accounting type of **GENERAL**.

The label preceding the rows of accounting data instructs you to pick one or more of the rows. The label ends with an example field name (e.g., COMMISSION AMOUNT), which is taken from the control file.

5	In the **FILE PATH/NAME** field, enter the location and name of the file to import.	You can click on the button to the right of the field and select a file from the **IMPORT FILE SELECTION** screen.
6	From the **TECHNICIAN TO POST TO** drop down list, select the technician to use to post the accounting entries into the PNM Plus database.	
7	In the **POSTING DATE** field, enter the Posting Date for the entries.	

8	Select the check boxes of the accounting data to be imported, and select the accounting code to use for each from the drop down lists.

9	Click on **OK.**	Once the Import process begins, it edits the selected fields for validity and uses the control file to determine where the target input data is in the input line.

The control file also is used to create a text file containing the date, phone ANI, Accounting Code, Amount, Technician ID, and Notes (if any). This text file is a holding queue of records built from the input data and is available for review before the records are added to the database.

After the program has completed reading all of the records in the designated input file, the **REVIEW IMPORT DATA** screen appears. *Figure B-3.*

Date	ANI	Code	Amount	Tech ID
01/08/96	806-555-9844	600	$0.14	9
01/08/96	806-555-9844	602	$0.32	9
01/08/96	806-555-9892	600	$0.51	9
01/08/96	806-555-9892	602	$1.56	9
01/08/96	806-555-9819	600	$0.17	9
01/08/96	806-555-9819	602	$0.58	9
01/08/96	806-555-9811	600	$0.10	9
01/08/96	806-555-9811	602	$0.29	9
01/08/96	806-555-9109	600	$0.02	9
01/08/96	806-555-9109	602	$0.08	9
01/08/96	806-555-9395	600	$0.13	9
01/08/96	806-555-9395	602	$0.28	9
01/08/96	806-555-9396	600	$0.04	9
01/08/96	806-555-9396	602	$0.08	9
01/08/96	806-555-9492	600	$0.20	9
01/08/96	806-555-9492	602	$0.41	9

13800 Records   **Add to Database**   **Cancel**

Figure B-3

At this screen, you can review the accounting journal entries built by reading the input ASCII file.

10	To accept the records displayed, click on **ADD TO DATABASE.**	The records are added to the database. Returns the **IMPORT ACCOUNTING DATA** screen. *Figure B-2*.
		When adding records to the database, the program verifies:
		• No duplicate accounting records are found in the PNM Plus database.
		• The ANI is valid and exists in the PNM Plus Database.
		• The amount is valid.
		If any of these conditions are not met, a warning message appears that provides the option to proceed or cancel the import of subsequent records.
		For former PNM users, the Import file format for PNM Plus is the same format PNM uses. Each record in the Import file represents data for an ANI and contains two or more fields (ANI and at least one additional field). Each field must be enclosed in double quotations and must be comma delimited. Each record must end on a carriage return and line feed.
11	Click on **OK.**	Returns the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.
12	To exit the **PNM PLUS UTILITIES** screen's **MAIN MENU**, select **FILE - EXIT**.	It returns you to the Windows desktop.

B.2.1 IMPORTING PAYPHONE DATA

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **IMPORT** icon.	The **IMPORT MENU** appears and enables you to pick an import type from a list box. *Figure B-1*.
		The first selection in the list box, **PNM PLUS PAYPHONE IMPORT**, enables you to import payphone data. The other selections enable you to import accounting data to the selected import type's account.
3	Select **PNM PLUS PAYPHONE IMPORT.**	
4	Click on **CHOOSE.**	The **ASCII IMPORT** screen appears. *Figure B-4*.

Figure B-4

The PNM Plus payphone Import utility lets you import data that you can use to add or update payphone detail information. (This is equivalent to the Import utility in PNM.)

The PNM PLUS database contains data fields that you can include in the ASCII file you want to import. Once you specify the data fields you want to import, you can select the Import file.

5	Select the data field you want to import from those displayed in the **DATA AVAILABLE TO IMPORT** list box.	To choose all the fields in the **DATA AVAILABLE TO IMPORT** list box, click on **CHOOSE ALL.**
6	Click on **ADD.**	The selected field is moved to the **DATA SELECTED TO IMPORT** list box.
7	Repeat steps 6 and 7 for each data field you want to import.	

8	Once the data fields you want to import are listed in the **ASCII IMPORT** screen's **DATA SELECTED TO IMPORT** list box, click on **IMPORT.**	The **SELECT ASCII IMPORT FILE** screen appears. *Figure B-5*.
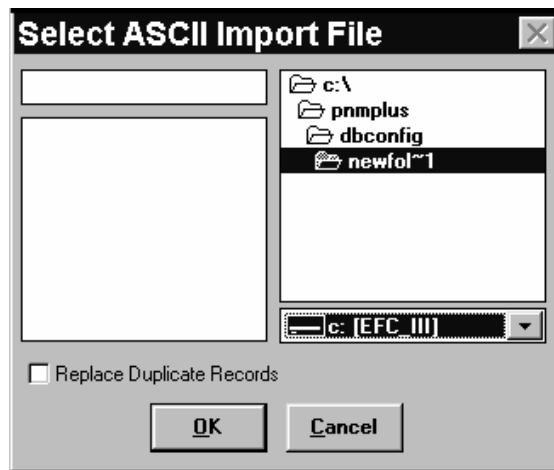
Figure B-5

9	Select the file directory and name of the file to import.	
10	Click on **OK**.	The file is imported to PNM Plus. Returns the **ASCII IMPORT** screen. *Figure B-4.*
11	Click on **CANCEL**.	Returns the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.
12	To exit the **PNM PLUS UTILITIES** screen's **MAIN MENU**, select **FILE - EXIT**.	It returns you to the Windows desktop.

The following table lists the payphone data you can import and the size of each associated data field.

Table B-1

Import Data	Field Size
Phone ANI	14 digits
Phone ID	10 digits
New Phone ID	10 digits
New Password	8 digits
Bypass Code	8 digits
Spare 1	26 characters
Spare 2	26 characters
Site ID	8 digits
Location	10 characters
Group	10 characters
Date Installed	10 characters. MM/DD/YYYY
Software Version	8 characters, i.e., 05.03.02
User Variable 1	10 characters
User Variable 2	10 characters
User Variable 3	10 characters
Rate File Name	8 characters (NO Extension)
Registers/Options Like	10 characters (NO Extension)
Priority Parsing File	8 characters (NO Extension)
Speed Dial File	8 characters (NO Extension)
Program File	8 characters (NO Extension)
Voice Brand File	8 characters (NO Extension)
Phone Area Code	3 digits
Dialing Lists	not currently imported
Spare 3	2 characters
Voice Blind Period	1 character (0-9)
Volume Gain	1 character (0-3)
1+ IXC Auth Code 1	19 digits
0+ OSP Auth Code 1	19 digits
0+ OSP Aux. Auth 1	19 digits
0+ OSP Auth Code 2	19 digits
0+ OSP Aux. Auth 2	19 digits
5.2.X IXC Auth 2	19 digits
5.2.X PAOF Auth	19 digits
Reset Alarms	1 character Y or N
Clear Totals	1 character Y or N

B.2.2 USING TEMPLATES

If you are planning to repeat the Import process several times, you can create a template containing the fields you want to import. You can use a template to import payphone data, but not accounting data.

B.2.2.1 Creating a Template

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **IMPORT** icon.	The **IMPORT MENU** appears and enables you to pick an import type from a list box. *Figure B-1.*
		The first selection in the list box, **PNM PLUS PAYPHONE IMPORT**, enables you to import payphone data. The other selections enable you to import accounting data to the selected import type's account.
3	Select **PNM PLUS PAYPHONE IMPORT.**	
4	Click on **CHOOSE.**	The **ASCII IMPORT** screen appears. *Figure B-4.*
5	Click on a data field you want to import from those displayed in the **DATA AVAILABLE TO IMPORT** list box.	To choose all the fields in the **DATA AVAILABLE TO IMPORT** list box, click on **CHOOSE ALL.**
6	Click on **ADD.**	The selected field moves to the **DATA SELECTED TO IMPORT** list box.
7	Repeat steps 6 and 7 for each field you want to import.	
8	Click on **SAVE TEMPLATE**.	The **IMPORT TEMPLATES** screen appears. *Figure B-6*. *Figure B-6*
9	Enter the name of the template.	
10	Click on **OK**.	The template is entered into the database. Returns the **ASCII IMPORT** screen. *Figure B-4*.
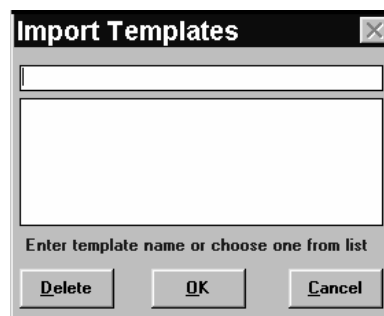
11	Click on **CANCEL**.	Returns the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.
12	To exit the **PNM PLUS UTILITIES** screen's **MAIN MENU**, select **FILE - EXIT**.	It returns you to the Windows desktop.

B.2.2.2 Using an Existing Template

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **IMPORT** icon.	The **IMPORT MENU** appears. *Figure B-1*.
3	Select **PNM PLUS PAYPHONE IMPORT.**	
4	Click on **CHOOSE.**	The **ASCII IMPORT** screen appears. *Figure B-4*.
5	Click on **GET TEMPLATE**.	The **IMPORT TEMPLATES** screen appears. *Figure B-6*.
6	Enter the name of the template you want to use or select the template to use from the list.	
7	Click on **OK**.	The template is available for you to use. Returns the **ASCII IMPORT** screen. *Figure B-4*.
8	Click on **CANCEL**.	Returns the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.
9	To exit the **PNM PLUS UTILITIES** screen's **MAIN MENU**, select **FILE - EXIT**.	It returns you to the Windows desktop.

B.3 Exporting Data from PNM Plus

In addition to importing data from various sources, you also can export data from PNM Plus to files that your other computer systems can use. The exportable data fields are the same ones available in PNM. The data exported from the PNM Plus Utility program can be in ASCII format, with commas separating each data item exported and with quotation marks around each alphanumeric field. You can also export data from PNM Plus for use by Intuit's Quicken or QuickBooks to print your checks or handle other accounting details.

B.3.1 EXPORTING ASCII FORMAT

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **EXPORT** icon.	The **SELECT EXPORT TYPE** screen appears. *Figure B-7*. *Figure B-7*
3	Select ASCII and click on **OK**.	The **ASCII EXPORT** screen appears. *Figure B-8*. *Figure B-8* The PNM PLUS database contains data fields that you can include in the ASCII file you want to export. Once you specify the data fields you want to export, you can enter the name of the Export file.
4	Select the data field from the **DATA AVAILABLE TO EXPORT** list box that you want to export.	
5	Click on **ADD**.	The data moves to the **DATA SELECTED TO EXPORT** list box.
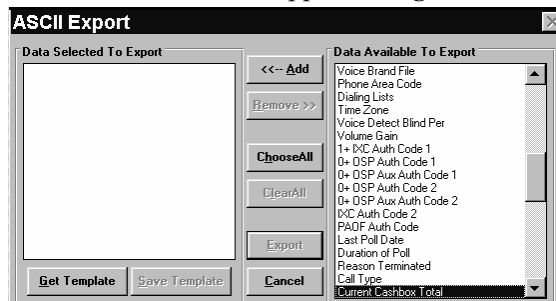
6	Repeat steps 4 and 5 for each data field you want to export.	
7	Once the data fields you want to export are listed in the **ASCII EXPORT** screen's **DATA SELECTED TO EXPORT** list box, click on **EXPORT**.	The **SET ASCII EXPORT FILE NAME** screen appears. *Figure B-9*. *Figure B-9*
8	Enter the 8-character name of the DOS output file where you want to export the data fields.	
9	Click on **OK**.	The data fields are exported to the output file. Returns the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.
10	To exit the **PNM PLUS UTILITIES** screen's **MAIN MENU**, select **FILE - EXIT**.	It returns you to the Windows desktop.

As is the case when importing, you can create an export template that specifies a set of fields to be exported from the PNM Plus database to an ASCII file (see *Section B.2.2, Using Templates)*.

The Export file consists of an ASCII formatted file, with each record containing the fields specified in the Export Data list. The format or contents of the fields on the exported file are shown below.

Table B-2

Export Data	Export Data Column Size
Payphone ANI	25 characters
Phone ID	4 digits
New Phone ID	4 digits
New Password	8 characters
Bypass Code	8 characters
Site Address 1	30 characters
Site Address 2	30 characters
Site City	30 characters
Site State	5 characters
Site Zip Code	10 characters
Site Name	26 characters
Install Date	10 characters

Table B-2

Export Data	Export Data Column Size
Software Version	8 digits
Site ID	
Location	
Group	
User Variable 1	10 characters
User Variable 2	10 characters
User Variable 3	10 characters
Rate File Name	8 characters
Registers/Options Like	10 characters
Priority Parsing File	8 characters (or less)
Speed Dial File	8 characters (or less)
Program File Name	8 characters (or less)
Voice Brand File	8 characters (or less)
Phone Area Code	3
Dialing Lists	17
Time Zone	2
Voice Detect Blind Per	1
Volume Gain	1
1+ IXC Auth Code 1	19 (although only first 14 contain data)
0+ OSP Auth Code 1	19 (although only first 14 contain data)
0+ OSP Aux. Auth Code 1	19 (although only first 14 contain data)
0+ OSP Auth Code 2	19 (although only first 14 contain data)
0+ OSP Aux. Auth Code 2	19 (although only first 14 contain data)
IXC Auth Code 2	19 (although only first 14 contain data)
PAOF Auth Code	19 (although only first 14 contain data)
Last Poll Date	17 date and time (00/00/00 00:00:00)
Duration of Poll	8 time (00:00:00)
Reason Terminated	15 characters
Call Type	Not exported
Current Cashbox Total	8 currency ($1000.00)
Total Last Collection	8 currency ($1000.00)
Totalizer	13 currency ($100000000.00)
Alarms - Handset	1 char (B or .)
Alarms - Vault/Bypass	1 char (C or .)
Alarms - Run in ROM	1 char (D or .)
Alarms - Rate Reload	1 char (E or .)
Alarms - Cashbox Trig	1 char (F or .)
Alarms - Cashbox Full	1 char (G or .)

Table B-2

Export Data	Export Data Column Size
Alarms - Inactivity	1 char (H or .)
Alarms - Coin Jam	1 char (I or .)
Alarms - Bad Rates	1 char (J or .)
Alarms - Bad Registers	1 char (P or .)
Alarms - Counters Lost	1 char (K or .)
Alarms - Telemetry Access	1 char (M or .)
Alarms - Master Block	1 char (L or .)
Alarms - Bad Pgm RAM	1 char (N or .)
Alarms - SMDR Corrupt	1 char (A or .)
Alarms - SMDR 80% Full	1 char (Q or .)
Alarms - SMDR 100% Full	1 char (R or .)
Alarms - Forced Call Home	1 char (O or .)
Alarms - VDC not Work	1 char (S or .)
Alarms - VDC 100% Full	1 char (T or .)
Alarms - Bad CAB	1 char (U or .)
Alarms - Wrong Polarity	1 char (W or .)
Alarms - Clock	1 char (V or .)
Alarms - Low Battery	1 char (X or .)
Alarms - Sched. Call Home	1 char (Y or .)
Alarms - Corrupt Message	1 char (Z or .)

B.3.2 EXPORTING FOR QUICKEN OR QUICKBOOKS

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **EXPORT** icon.	The **SELECT EXPORT TYPE** screen appears. *Figure B-7*.

3	Select either **QUICKEN** or **QUICKBOOKS**.	The **CRITERIA SELECTION** screen appears. *Figure B-10*.
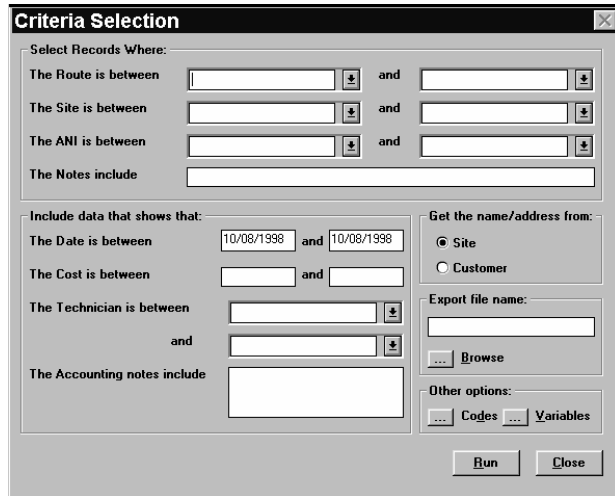
Figure B-10

*The **ACCOUNT NAME TO IMPORT TO** field is not shown when exporting to Quicken.*

4	Enter the **SELECT RECORDS WHERE:** data.	This section will limit the Export function to include specified phones. Select records to be exported by Route, Site, ANI, or with specific Notes.
5	Enter the **INCLUDE DATA THAT SHOWS THAT:** data.	This section will limit the Export function to include specific data. Include data to be exported by specifying Dates, Cost, Technician, or Accounting Notes.
6	For QuickBooks only, enter the **ACCOUNT NAME TO IMPORT TO** data.	This information is required when exporting to QuickBooks.
7	Choose where to get the name/address from.	
8	Enter an **EXPORT FILE NAME**.	

9	Select **OTHER OPTIONS** for **CODES**.	The **SELECT ACCOUNTING CODES** screen appears. *Figure B-11*.
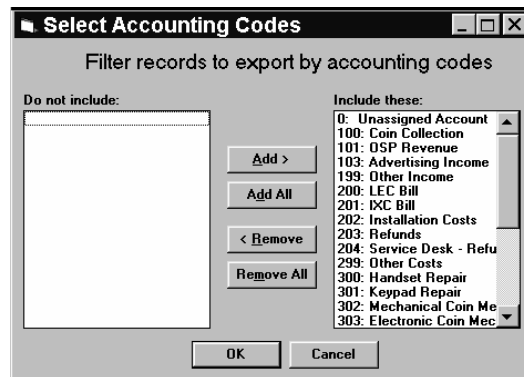
Figure B-11

Select specific Accounting Codes and click on **OK**.

10	Select Other Options for Variables.	The **USER VARIABLES** screen appears. *Figure B-12*.
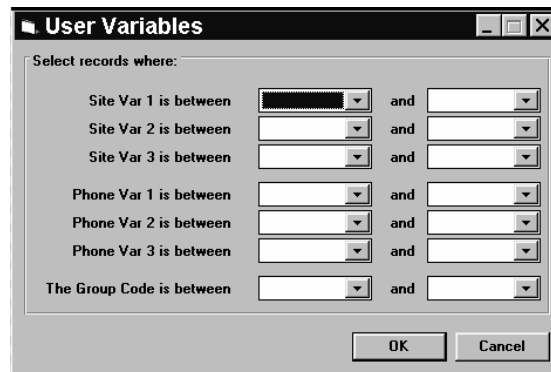
Figure B-12

Select specific User Variables and click on **OK**.

11	Click on Run.	Export will verify the number of records to be written. *Figure B-13*.
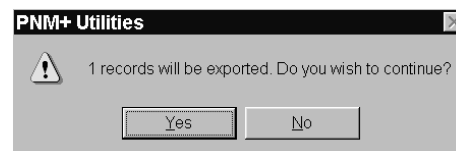
Figure B-13

Click on Yes to send the data to an Export file.

12	Open your Quicken or QuickBooks program and import the newly created file.	Quicken or QuickBooks will ask you to verify the number of records to be imported. This should match the number of records from the previous step.

B.4 Purging Information from PNM Plus

As you collect data in PNM Plus, you need to consider purging from your database historical entries for the following:

- Contact History
- SMDR
- Accounting Journal
- Work Orders
- Complaints

The PNM Plus Purge utility provides you with an easy-to-use interface that enables you to select the data types and date range to purge.   A status bar displays the percentage of the purge that is complete.

CAUTION: *Before purging data from your database, you might want to back up your data since there is no UN-DO function to reverse the Purge.*

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **PURGE** icon.	The **PURGE DATA FROM DATABASE** screen appears. *Figure B-14*.
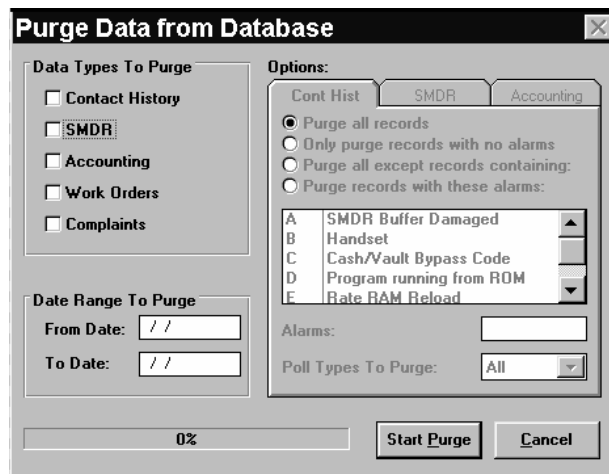
Figure B-14

3	Select the data types to be purged by clicking on the appropriate check boxes in the **DATA TYPES TO PURGE** list box.	**CONTACT HISTORY**, **SMDR**, and **ACCOUNTING** have advanced purge options available for the experienced user. Default settings will purge all records, but filters are available to purge or save specific record types in these three areas. Steps 5-7 explain these options.

| **4** | Click in the **CONTACT HISTORY** box. | The **CONTACT HISTORY** options appear. ***Figure B-15.*** |
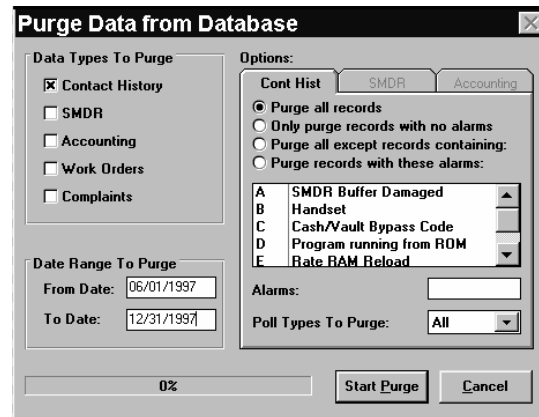
Figure B-15

Select **PURGE ALL RECORDS**	This option requires no menu selection. All contact history records for the given date range will be purged.
Select **ONLY PURGE RECORDS WITH NO ALARMS**	This option requires no menu selection. Records with no alarms will be purged for the date range given.
Select **PURGE ALL EXCEPT RECORDS CONTAINING:**	This option allows you to choose alarm codes from the menu (***Figure B-15***) and save any records containing the selected alarms. All other records for the given date range will be purged. When more than one alarm code is selected, records containing any one of the selected codes will not be purged.
Select **PURGE RECORDS WITH THESE ALARMS:**	This option also uses the menu (***Figure B-15***). The alarms must be entered in the proper order for recognition. The alarms list follows the order in which alarms are stored in the database. Set your filter from the menu going down the list. Only the records that match the filter exactly will be affected.
	For example, when you set the filter to purge records with the alarm setting **Q:R**, only records with the **Q:R** alarm in the given date range will be purged. Records with alarm setting **G:Q:R** will not be purged. Likewise, if the filter is set at **G:Q:R**, records with only **Q:R** will not be purged. If the filter is set at **R:Q**, no records will be purged as the filter is not in the proper order.
Select **POLL TYPES TO PURGE**	You may not want to purge all poll data. For example, the first day of every month a special accounting poll may be set up. Using this field, you can set the purge function to purge data selectively and save only this accounting information for the end of the quarter or end of the year.

5 Click in the **SMDR** box.   The **SMDR** options appear. ***Figure B-16***.
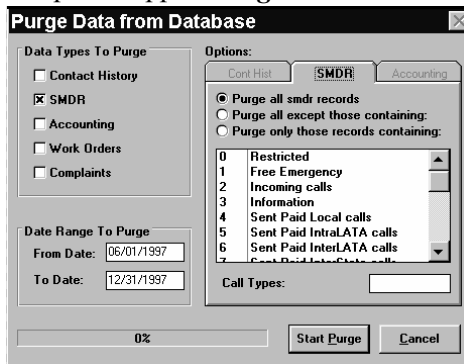
Figure B-16

Select **PURGE ALL SMDR RECORDS**

The **PURGE ALL SMDR RECORDS** option requires no menu selection. All SMDR records for the given date range will be purged.

Select **PURGE ALL EXCEPT THOSE CONTAINING:**

The **PURGE ALL EXCEPT THOSE CONTAINING**: option allows you to choose SMDR codes from the menu (***Figure B-16***) and save any records containing the selected SMDR. All other records for the given date range will be purged. When more than one SMDR code is selected, records containing any one of the selected codes will not be purged.

Select **PURGE ONLY THOSE RECORDS CONTAINING:**

The **PURGE ONLY THOSE RECORDS CONTAINING**: option also uses the menu (***Figure B-16***). The SMDR codes must be entered in the proper order for recognition. The SMDR list follows the order in which codes are stored in the database. Set your filter from the menu going down the list. Only the records that match the filter exactly will be affected.

For example, when you set the filter to purge records with the SMDR codes 23:24, only records with the 23:24 code in the given date range will be purged. Records with SMDR setting 15:23:24 will not be purged. Likewise, if the filter is set at 15:23:24, records with only 23:24 will not be purged. If the filter is set at 24:23, no records will be purged as the filter is not in the proper order.

6	Click in the **ACCOUNTING** box.	The **ACCOUNTING** options appear. *Figure B-17*.
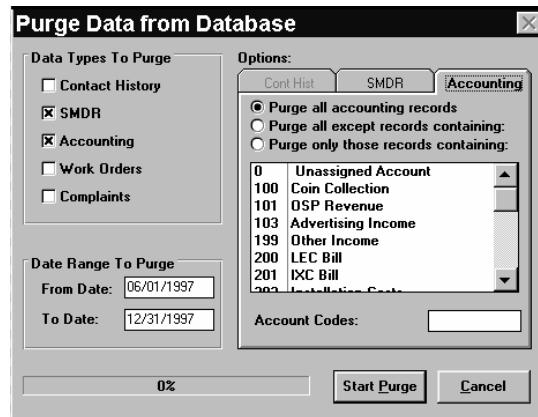
Figure B-17

	Select **PURGE ALL ACCOUNTING RECORDS**	The **PURGE ALL ACCOUNTING RECORDS** option requires no menu selection. All accounting records for the given date range will be purged.
	Select **PURGE ALL EXCEPT RECORDS CONTAINING:**	The **PURGE ALL EXCEPT THOSE CONTAINING:** option allows you to choose accounting codes from the menu (*Figure B-17*) and save any records containing the selected codes. All other records for the given date range will be purged. When more than one accounting code is selected, records containing any one of the selected codes will not be purged.
	Select **PURGE ONLY THOSE RECORDS CONTAINING:**	The **PURGE ONLY THOSE RECORDS CONTAINING:** option also uses the menu (*Figure B-17*). The SMDR codes must be entered in the proper order for recognition. The SMDR list follows the order in which codes are stored in the database. Set your filter from the menu going down the list. Only the records that match the filter exactly will be affected. See step 5 or 6 for an example.
7	In the **DATE RANGE TO PURGE** fields, enter the date range that includes the data you want to purge.	
8	Click on **START PURGE**.	After you verify your deletions, the selected data types are purged from the database. Returns the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.
9	To exit the **PNM PLUS UTILITIES** screen's **MAIN MENU**, select **FILE - EXIT**.	It returns you to the Windows desktop.

B.5 Cleaning Up the PNM Plus and SMDR databases

When you change data in a PNM Plus or SMDR database, the database file can become corrupted and fragmented and use more disk space than necessary. You also might need to repair a database if there is a power outage or your computer experiences a hardware problem.

The Cleanup utility repairs corrupted database files. It also compacts (defragments) the files, which recovers disk space.

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **CLEANUP** icon.	The **SELECT DATABASES TO REPAIR AND COMPACT** screen appears. *Figure B-18*.
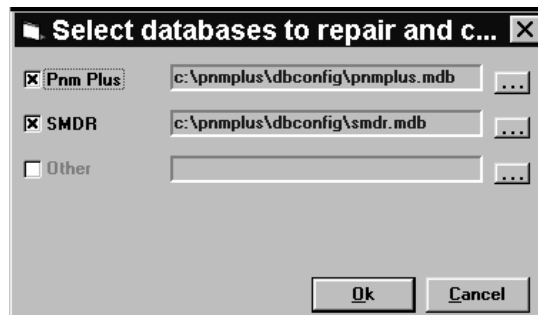
Figure B-18

CAUTION: *You must close the database before you compact it. If you have a multi-user environment, other users cannot have the database open while you are compacting it. Also, since the Compact Database function creates a copy of the database, you must have enough disk space for the original and duplicate databases.*

3	Select the check box to the left of the type of database you want to clean up (PNM Plus, SMDR, or Other).

4	Click on the button to the right of the field.	The **PNM PLUS DATABASE SELECTION** screen appears. *Figure B-19.*
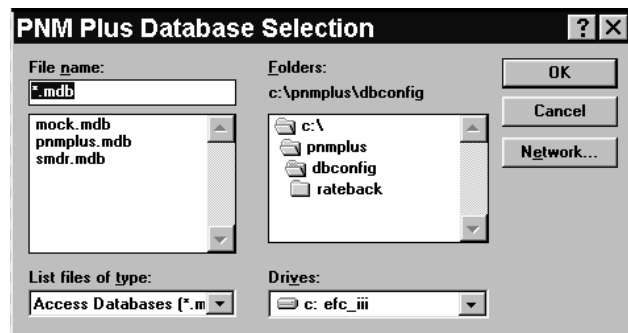
Figure B-19

5	Select the directory and database you want to clean up.	
6	Click on **OK**.	Returns the **SELECT DATABASES TO REPAIR AND COMPACT** screen. *Figure B-18*.
7	Click on **OK**.	Cleans up the database you selected. Returns the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.
8	To exit the **PNM PLUS UTILITIES** screen's **MAIN MENU**, select **FILE - EXIT**.	It returns you to the Windows desktop.

B.6 Searching and Replacing ANIs

The ANI Search and Replace utility (also known as the Change ANI utility) enables you to change the NPA for a range of NPA-NXXs. For example, you might need to change the NPA because of an NPA split or data entry errors.

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **CHANGE ANI** icon.	The **PNM PLUS ANI SEARCH AND REPLACE UTILITY** screen appears. *Figure B-20*.
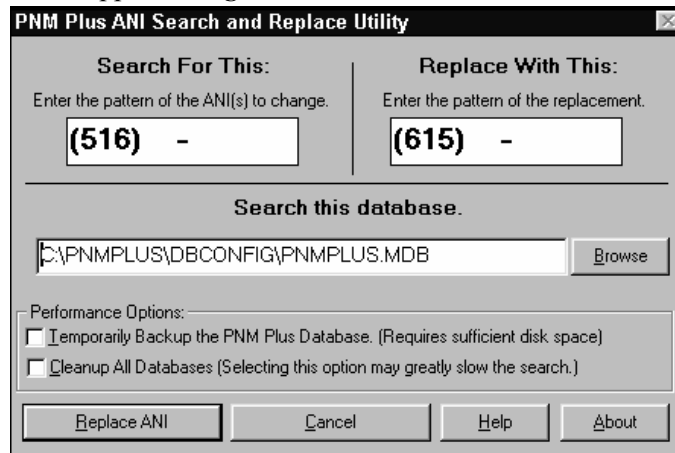
Figure B-20

3	In the **SEARCH FOR ANI(S)** field, enter the ANI you want to change.	The combinations you can enter are an NPA only, NXX only, NPA and NXX, NXX and XXXX, or an NPA, NXX, and XXXX.
4	In the **REPLACE WITH ANI(S)** field, enter the ANI that you want to replace the ANI in the **SEARCH FOR ANI(S)** field.	Enter the same combination that you entered in step 4.

| **5** | In the **SEARCH THIS DATABASE** field, enter the database containing the ANI you want to change. | You can change the default database that appears by entering over the default database or by clicking on **BROWSE** and then selecting the database from the **SELECT THE PNM PLUS DATABASE FOR ANI CHANGES** screen. *Figure B-21* |
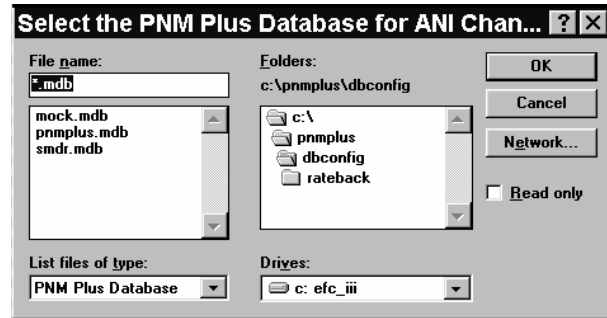
Figure B-21

Once you select a database from this screen, click on **OK** to return to the **PNM PLUS ANI SEARCH AND REPLACE UTILITY** screen.

6	In the Performance Options window, you can click on one of the following check boxes:	
	• Click on the first check box if you want to create a temporary backup of your database before you make changes to it.	You need to make sure you have enough disk space to store a backup copy of your database.
	• Click on the second check box if you want to cleanup all databases at this time.	Performing this procedure slows down your replacement process, but may improve future performance.

7	Click on **REPLACE ANI**.	The ANI in the Replace field replaces all ANIs that match the ANI in the Search field. The Database field shows you the status of the replacement as it occurs.
		When the replacement is complete, the **ANI SEARCH AND REPLACE COMPLETE** screen displays the results. *Figure B-22.*
		Figure B-22
8	Click on **OK** to accept the changes.	You are prompted if you want to compact the database. This will save you space, but might take some time if you have a large database.
9	Click on your answer to the prompt.	Returns the **PNM PLUS ANI SEARCH AND REPLACE UTILITY** screen. *Figure B-20.*
10	You have the following options:	
	• Click on **DONE** if you do not want to replace additional ANIs.	It returns you to the Windows desktop.
	• Click on **REPLACE ANOTHER** if you do want to replace additional ANIs and then repeat this procedure.	
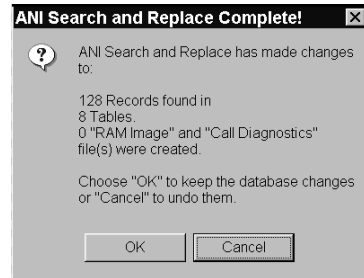
B.7 Upgrading PNM Plus Databases

If you are already using PNM Plus and Elcotel releases a newer version, the Upgrade utility converts your PNM Plus databases to the newer version. The new databases that are created are based on a template provided with the new version.

Note: *The Upgrade utility is designed to work only with authorized PNM Plus data structures. Also, to preserve your Poll Manager port information when upgrading from a previous version of PNM Plus, you must install the latest Poll Manager before running the Upgrade utility.*

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **UPGRADE** icon.	The **PNM PLUS UPGRADE UTILITY** screen informs you that your version of the PNM Plus database is about to be converted to the new version. *Figure B-23*.
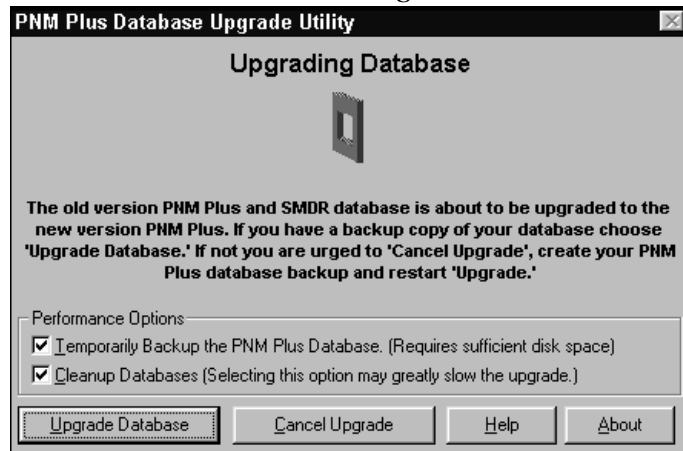
Figure B-23

If the process is interrupted or you cancel the program, Upgrade uses its temporary backup to restore your original database. If Upgrade cannot find disk space for your database backup, you are urged to create a backup before proceeding with the Upgrade process.

3	Select the **PERFORMANCE OPTIONS**	To ensure proper conversion, both options are on by default.
		If you select the **TEMPORARILY BACKUP THE PNM PLUS DATABASE** option, the Upgrade utility automatically creates a backup of your database to protect your data from errors. The larger the database to be converted, the greater the chance for an incident (e.g., power failure or hardware failure) to interrupt the Upgrade process.
		If you select the **CLEANUP DATABASES** option, the utility will eliminate any corrupted data blocks and de-fragment the database after the upgrade is complete. This will enable the database to run more quickly and efficiently.
4	At the **PNM PLUS UPGRADE UTILITY** screen, click on **UPGRADE DATABASE**.	The **PNM PLUS DATABASE SELECTION** screen appears. ***Figure B-24***.
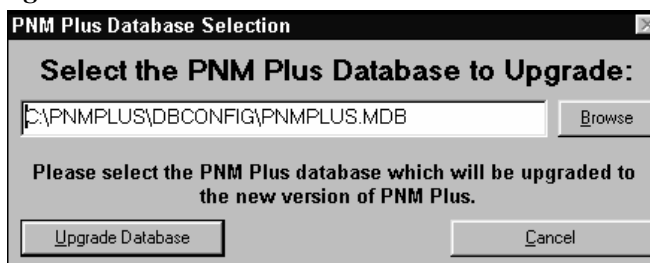
Figure B-24

This screen asks you to verify the database you want to convert. The database name that appears in this screen is the database that exists in your PNM Plus system.

5	If you want to convert a different database than the one displayed in the **PNM PLUS DATABASE SELECTION** screen, click on **BROWSE**. If you do not, go to step 8.	When you click on **BROWSE**, the **SELECT THE PNM PLUS DATABASE TO UPGRADE** screen appears. ***Figure B-25***.
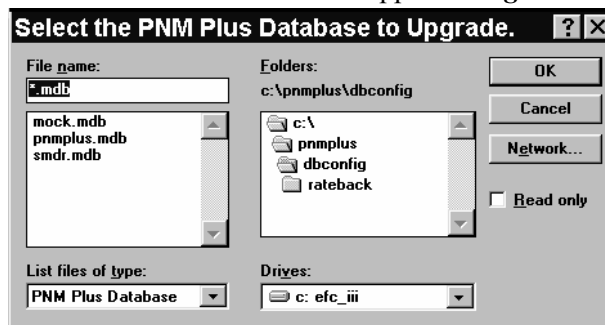
Figure B-25

6	Select the Drive and Directory containing the database you want to upgrade and then double click on the database you want to upgrade.	Returns the **PNM PLUS DATABASE SELECTION** screen with the name of the database you want to convert.
		Note: *When you upgrade a database, the SMDR database is automatically updated at the same time.*

7   When the database you want to convert appears in the **PNM PLUS DATABASE SELECTION** screen, click on **UPGRADE DATABASE**.

The Upgrade utility begins updating the database you selected. The **PNM PLUS UPGRADE UTILITY** screen tells you what it is doing and how much of the process has been completed. *Figure B-26*.
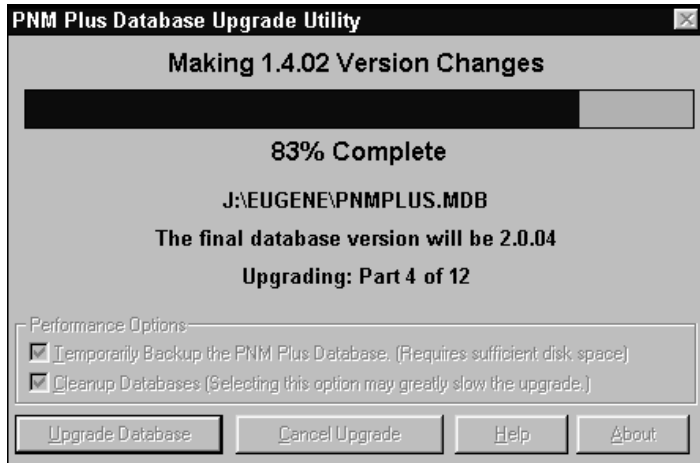
Figure B-26

When the Upgrade process is complete, the **UPGRADE COMPLETE! COMPACT THE DATABASE?** screen asks you if you want to compact your database. *Figure B-27*.
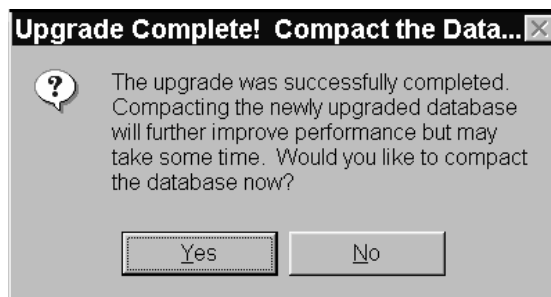
Figure B-27

Although not a requirement, compacting your database enables PNM Plus to process the database's information more quickly and efficiently. To compact successfully, you need free disk space that is 2 times greater than the size of the database because of the backup files that are created during the Compacting process.

8	To compact the database, click on **YES**. If you do not want to compact the database, click on **NO**.	If you click on **YES**, the **PNM PLUS UPGRADE UTILITY** screen tells you what it is doing and how much of the process has been completed. *Figure B-26*. When the Upgrade utility has completed upgrading the database, the **PNM PLUS UPGRADE UTILITY** screen asks you if you want to upgrade another database. *Figure B-28*.

Figure B-28

9	If you want to upgrade another database, click on **UPGRADE ANOTHER**. If you do not want to upgrade another database, click on **DONE UPGRADING**.	If you click on **UPGRADE ANOTHER**, the **PNM PLUS DATABASE SELECTION** screen appears, where you can select the next database to be upgraded. Go to step 5. If you click on **DONE UPGRADING**, you return to the Windows desktop.

B.8 Phone Acquisition Merge Utility

The Phone Acquisition Merge Utility allows you to combine, or merge, separate PNM Plus databases into your working PNM Plus database. When you merge two databases, you also have the option of adding the new phone information to a poll list. This utility is used mainly in cases where you are adding new phones to your system. It allows you to merge the new phones' information with your existing database.

The PNM Plus Merge Utility screen gives you a blank text box for the name and location of the source database to be combined with your working receive database. A browse function allows you to easily search for and select either of the two databases. When the Merge process is complete, this screen is displayed again to give you the opportunity to merge another database or to cancel the merge just completed.

To protect your database, Merge makes automatic temporary backups. If there is not enough disk space to perform the backup function, you will be asked to select an alternate location for the backup. You also have the option of continuing with the merge without a backup, but PNM Plus will warn you of the possible dangers of doing so.

In addition to backing up your files, the Merge Utility screen provides a repair and compact option. This option is turned off for performance reasons, but you can turn the option on by clicking the appropriate performance option box on the screen. This may be an important safety step if your database has not been serviced lately.

After the Merge is complete, you will be presented with the option of placing all of the newly merged phones on a poll list. The new poll list will be given a filename corresponding to the source database (i. e. *SOURCE.MDB*). You can view this information by clicking on the Poll Lists in the Operator Console Main Menu.

The Merge function will be stopped if the source database and the receive database contain duplicate ANIs or Phone IDs. If duplicate ANIs are encountered, a list of these ANIs is written to a text file. If duplicate IDs are encountered, a Poll List is created in the Source database containing all phones which must have their IDs changed. This allows the user to poll the conflicting phones and change the ID.

CAUTION: *Before merging databases, make sure both databases are upgraded to the latest revision, and check that both use the same (4- or 10-digit) ID convention. Failure to do this can result in future conflicts.*

1	Click on **START**. Go to **PROGRAMS**, **PNM PLUS**, and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **PHONE ACQUISITION MERGE** icon.	The **PNM PLUS PHONE ACQUISITION MERGE UTILITY** screen appears. *Figure B-29*.
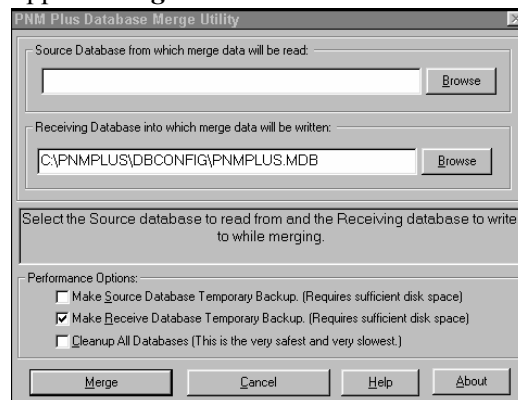
Figure B-29

3	Enter the **SOURCE DATABASE.**	Enter the file name to be brought in to your current database and the location of the file, or click on **BROWSE**.
		When you click on **BROWSE**, the **SELECT THE PNM PLUS DATABASE TO READ DATA FROM** screen appears. *Figure B-30*.
		Figure B-30
4	Enter the **RECEIVING DATABASE**.	The current working database will be displayed here. If you wish to merge to a different database, enter the file name and location or click on **BROWSE**.
5	Select **PERFORMANCE OPTIONS**.	If you select the **MAKE SOURCE DATABASE TEMPORARY BACKUP** option, the Upgrade utility automatically creates a backup of your source database to protect your data from errors. The larger the database to be merged, the greater the chance for an incident (e.g., power failure or hardware failure) to interrupt the Merge process.
		If you select the **MAKE RECEIVE DATABASE TEMPORARY BACKUP** option (on by default), the Upgrade utility automatically creates a backup of your receive database to protect your data from errors.
		Note: *Temporary Backups are for the use of the Merge utility only. They are deleted after a successful merge.*
		If you select the **CLEANUP DATABASES** option, the utility will eliminate any corrupted data blocks and de-fragment the database after the upgrade is complete. This will enable the database to run more quickly and efficiently.
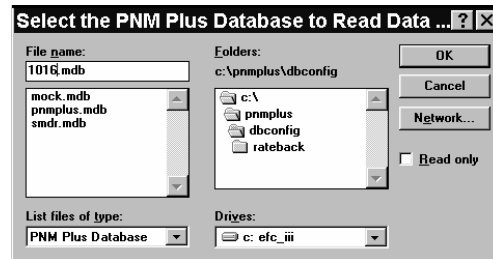
6   Click on **MERGE**.

The Merge function begins by verifying the databases, creating backups as selected, and reconciling the new database. If the phone ANI's and ID's are compatible, the Phone Acquisition Merge Utility will proceed. See *Figure B-31*.
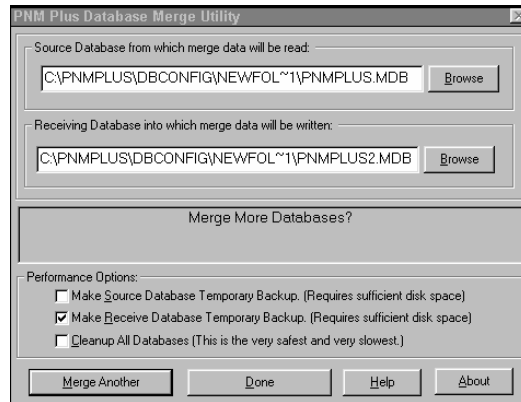
Figure B-31

If duplicate ANI's are detected, the merge will be halted. See *Figure B-32*.

Figure B-32

This is a critical error and PNM Plus has no method of working around this problem. The duplicate files must be removed before Merge can continue. The DUPANIS.TXT file can be read using the Windows Notepad. See *Figure B-33*.

```
------------------------------------
- Elcotel's PNM Plus Merge Utility -
------------------------------------
Duplicate ANIs found while Merging phone data
from the source database:
C:\PNMPCO~1\TEST\SOURCE1.MDB
into the receive database:
C:\PNMPCO~1\TEST\RECEIVE.MDB
Friday, Apr 18 1997 09:17:15 AM
  1) 2155559859
  2) 6105559707
  3) 2155558527
  4) 2155559398
  5) 2155559465
```

Figure B-33

If duplicate ID's are found during the Merge attempt, the utility can assign non-conflicting ID's to your new phones. A one time poll list will be created to assign the new ID's. You must change the duplicate ID's before proceeding with Merge.   See *Figure B-34.*
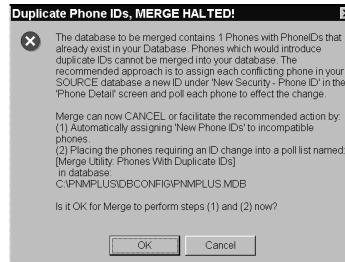
Figure B-34

Click on **OK**.

The Phone Acquisition Merge Utility will search for new ID's and create a poll list. See *Figure B-35.*

Figure B-35

Click on **OK**.

An advisory message is displayed about the need to poll your phones. See *Figure B-36.* Click on **OK**.

Figure B-36

7   Select **CREATE A POLL LIST** option.

PNM Plus will automatically enter all of the newly merged phones to a Poll List if you select **YES** (*Figure B-37*). You can view this information by clicking on the **POLL LIST** in the **OPERATOR CONSOLE MAIN MENU**.
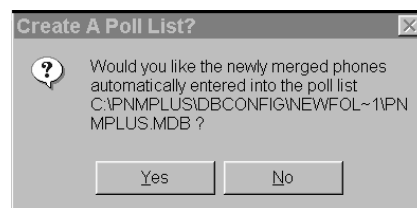
Figure B-37

| 8 | Click on **OK**. | PNM Plus displays a summary of phones and sites to be brought in to your working database (*Figure B-38*). Select **OK** to accept the changes or **CANCEL** to reject. |
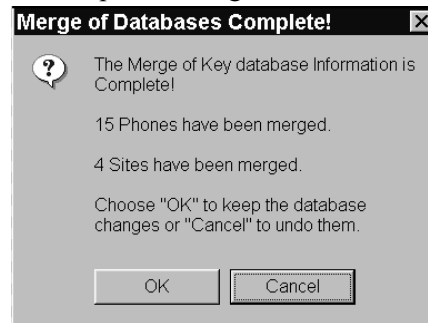
Figure B-38

| 9 | If you want to merge another database, click on **MERGE ANOTHER**. If you do not want to merge another database, click on **DONE**. | Once the merge is complete, you will be asked to merge more databases. See *Figure B-39*. |
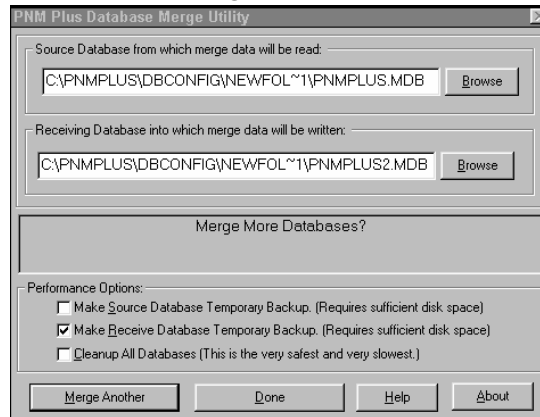
Figure B-39

If you click on **MERGE ANOTHER**, the **PNM PLUS PHONE ACQUISITION MERGE UTILITY** screen appears, where you can select the next database to be merged. Go to step 4.

If you click on **DONE**, you return to the **PNM PLUS UTILITIES** screen's **MAIN MENU**. *Figure 3-19*.

B.9 The Multiple Database Manager (OPTIONAL)

The Multiple Database Manager Utility ("MDM") has been added to assist payphone owners who routinely manage groups of phones in widely disbursed geographical areas. This utility allows you to merge polling data from several satellite offices to create a single master database at the central "home office" location. This includes both network/phone configuration databases (usually named *pnm-plus.mdb*), and SMDR databases (*smdr.mdb*). This makes it possible to perform reporting functions at the home office without incurring the weekly or daily long distance charges that result from polling all of your phones from the home city. The Multiple Database Manager Utility also allows you to download configuration information to the remote offices (by updating their *pnmplus.mdb* files), so that they, in turn, can update the phones in their cities.

The Multiple Database Manager is only available if have elected to install the optional 32-bit software enhancements.

The sections that follow explain how to install the Multiple Database Manager, how to use it to gather and merge satellite database information into a single, centralized database, and how to use it to update the satellite databases in remote field locations.

B.9.1 INSTALLING THE MULTIPLE DATABASE MANAGER

When PNM Plus 2.1 is first installed on your computer, it is possible that the Multiple Database Manager icon may appear on the Utilities Menu (Figure 3-19), but not be available for use. (It *appears* on the menu if you have installed PNM Plus using a 32-bit CD-ROM key. It is *available* only if you selected it from the "Select Components to Install" screen during setup.) To install the Multiple Database Manager *after* the rest of PNM Plus has been installed, follow these steps.

From the Windows desktop:

1	Insert the PNM Plus CD-ROM into the appropriate drive.	
2	Click on **START** and select **RUN**.	The **WINDOWS RUN PROGRAM** dialog box appears and you are prompted for a filename.
3	Click on **BROWSE**.	The **BROWSE** dialog box appears.
4	Double-click on the directory icons until you find the directory named **MDM.** Double-click to open that directory.	The **MDM** directory will probably be two or more levels below the main **PNM PLUS** directory. Use standard Windows 95 methods to navigate through the directory structure and find the subdirectory for which you are searching.
5	Locate the **SETUP** icon and double-click on it.	The Multiple Database Manager **SETUP** program starts.
6	Follow the instructions on the screen to install the Multiple Database Manager.	
7	If you are prompted to restart the computer, select **YES** and wait for the reboot process to finish.	When it is finished, you will be returned to the Windows desktop.

B.9.2 UPDATING THE MASTER DATABASE

The Multiple Database Manager (MDM) allows you to gather information from a number of satellite databases in remote cities and merge into a single master database. By using this utility, you can maintain an up-to-date record of payphones throughout your service area without having to perform daily or weekly polling of all phones from the home office. This makes it possible to do all of your accounting and reporting functions in one location, with data available for all phones, even those in distant locations.

Both configuration and SMDR information can be gathered and merged using MDM. Updating the primary (master) database causes the secondary *smdr.mdb* file to be purged. Each time an smdr.mdb is sent in to the primary database, an empty one should replace it. If this does not occur, future polling and primary database update functions may be slowed.

CAUTION: *Before merging databases, make sure both databases are upgraded to the latest revision, and check that both use the same (4- or 10-digit) ID convention. Failure to do this can result in future conflicts.*

CAUTION: *Make sure Poll Manager is turned OFF when you are accessing a satellite location's database with Multiple Database Manager.*

1	Click the **START** button on the Windows Task Bar. Select **PNM PLUS** and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **MULTIPLE DATABASE MANAGER** icon.	The **MULTIPLE DATABASE MANAGER MENU** displays. *Figure B-40.*

Figure B-40

This menu has three buttons. The first two are used to select the primary and secondary database update functions. The third exits the Multiple Database Manager and returns you to the **UTILITIES MAIN MENU**.

3	Click the **UPDATE PRIMARY DATABASES** button.	The **UPDATE PRIMARY DATABASES MENU** appears. *Figure B-41*..
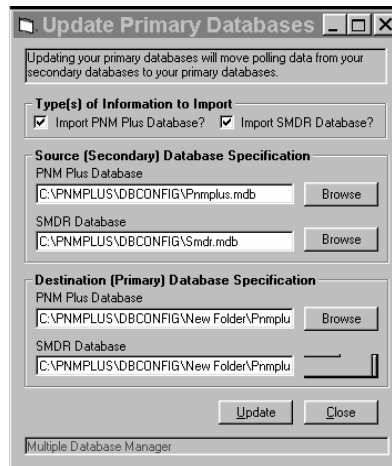
Figure B-41

4	Check the **TYPE(S) OF INFORMATION TO IMPORT** from the secondary database into the primary one. • To collect configuration information, click the check box next to **IMPORT PNM PLUS DATABASE?** • To collect SMDR information, click the check box next to **IMPORT SMDR DATABASE?**	
5	Enter the names of the satellite databases from which the information is to be collected under **SOURCE (SECONDARY) DATABASE SPECIFICATION**.	Spaces are provided for both the PNM Plus and the SMDR database from a single satellite office. Use the **BROWSE** buttons if you do not remember the names or locations of the source databases. Note: *If you are merging information from just one of the databases (PNM Plus or SMDR), only that database name needs to be entered.*
6	Enter the names of the master databases into which the information is to be merged under **DESTINATION (PRIMARY) DATABASE SPECIFICATION**.	Spaces are provided for both the master PNM Plus and the master SMDR database. Use the **BROWSE** buttons if you do not remember the names or locations of the databases. Note: *If you are merging information into just one of the databases (PNM Plus or SMDR), only that database name needs to be entered.*

7	Click on **UPDATE** to begin the merging process.	Merging databases may take a few minutes to finish. When the process is complete, you are prompted for additional databases to merge.
8	If you wish to merge additional secondary databases into the master (primary) database, repeat steps 4 through 7. When all satellite data has been merged, click on **CLOSE**.	You are returned to the **MULTIPLE DATABASE MANAGER** menu. *Figure B-40.*
9	Click on **EXIT**.	This returns you to the **UTILITIES MAIN MENU.** *Figure 3-19*

B.9.3 UPDATING THE SECONDARY DATABASES

The Multiple Database Manager has the capability of downloading information to your satellite offices, so they, in turn, can use it to update the phones in their individual service areas. This downloading feature is limited to configuration information, because there normally is no need to download SMDR records.

CAUTION: *Make sure Poll Manager is turned OFF when you are accessing a satellite location's database with Multiple Database Manager.*

1	Click the **START** button on the Windows Task Bar. Select **PNM PLUS** and click on **UTILITIES**.	The **PNM PLUS UTILITIES** screen's **MAIN MENU** appears. *Figure 3-19*.
2	Click on the **MULTIPLE DATABASE MANAGER** icon.	The **MULTIPLE DATABASE MANAGER MENU** displays. *Figure B-40*
3	Click the **UPDATE SECONDARY DATABASES** button.	The **UPDATE SECONDARY DATABASES MENU** appears. *Figure B-42*.
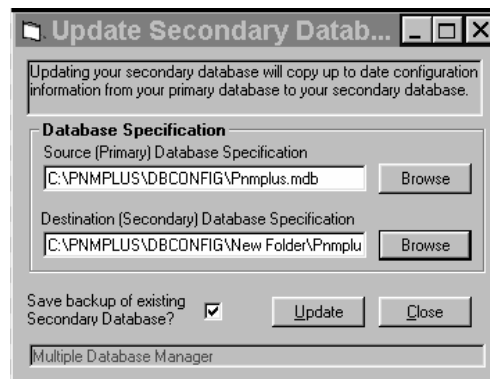
Figure B-42

4	Enter the name of the master database from which configuration information is to be downloaded under **SOURCE (PRIMARY) DATABASE SPECIFICATION**.	Use the **BROWSE** button if you do not remember the name or location of the master database.
5	Enter the name of the satellite database to which configuration information is to be sent under **DESTINATION (SECONDARY) DATABASE SPECIFICATION**.	Use the **BROWSE** button if you do not remember the name or location of the satellite database.
6	Click on **UPDATE** to begin the downloading process.	Merging databases may take a few minutes to finish. When the process is complete, you are prompted for additional databases to update.
7	If you wish to download configuration to additional secondary databases, repeat steps 4 through 6. When all satellite databases have been updated, click on **CLOSE**.	You are returned to the **MULTIPLE DATABASE MANAGER** menu. *Figure B-40*.
8	Click on **EXIT**.	This returns you to the **UTILITIES MAIN MENU**. *Figure 3-19*.

APPENDIX C. DESCRIPTION OF REPORTS

Each of the reports that PNM Plus produces is discussed in the following sections.

The Hit List by Route

11/6/1996   *Page 1*

8:45 AM

			Last Poll				Previous Poll		Change from Previous Contact				
										LCoin	Zero+	Around	
ANI	ID	Location	Date	Time	Cashbox	Alarms	Date	Time	Totalizer	OCoin	Zero-	Other	
Route: Joe's Route													
Site: Bob's Big Burger													
(305) 555-9172	2569	Bathroom	9/27/96	4:37 AM	$7.00		09/26	4:13 AM	$0.25	1	0	0	0 00
(904) 555-9808	2527	Bus Stop	9/16/96	4:34 AM	$10.90		09/15	4:36 AM	$0.50	2	0 1	0	01
(904) 555-9816	2527	Outside	9/27/96	4:22 AM	$28.25		09/26	4:19 AM	$0.75	3	0 0	0	00
Site Totals:	Bob's Big Burger				$46.15	3 ANI's			$1.50 6	0	1	0	0 1
Site: Ana Coffee Shop		1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989						Ana Cesse					
(305) 555-8337	9527	Lounge	10/3/95	10:37 AM	$72.65 R		09/20	3:45 AM	$107.15 144	3	19 14	114	5
(305) 555-9722	1809	Booth	10/3/95	10:39 AM	$97.10 R		09/27	2:27 PM	$46.30				
(305) 555-9998	5488	Inside	10/3/95	11:44 AM	$93.20 R		09/20	3:50 AM	$131.25 203	-1	46 27	141	8
Site Totals:	Ana Coffee Shop				$262.95	3 ANI's			$284.70 347	2	65 41	255	13
Site: Ana Fashions		Waterfall Mall Miami, FL 33980						Ana Smith					
(305) 555-9543	1166	outside Pe	9/27/96	4:28 AM	$137.00		09/26	4:25 AM	$5.50 22	0	4 2	4	2
Site: Aquino Laundry		5th street Route 1 S.Miami, FL 39980						Ray Aquino					
(407) 555-9172	1233	Bathroom	10/3/95	10:42 AM	$24.30	R	09/20	3:48 AM	$20.55 79	0	12 0	0	555
Site: El Barrilito		Calle 8, 3rd Ave. Miami, FL 33980						Juan Valdez					
(305) 555-9406	9909	outside Pe	9/27/96	4:18 AM	$17.25		09/26	4:15 AM	$1.00 4	0	0 0	0	0
Site: El Dorado		Dorado Avenue Sarasota, FL 59980						Dorado Corp.					
(305) 555-9714	4444	Jewelers 2	9/27/96	4:02 AM	$140.40		09/26	4:00 AM	$9.55 30	2	1 3	2	1
Site: Luis Mobil		Corner of Ash and Oak Street Miami, FL 33908						Luis Hernandez					
(305) 555-9071	9237	Gas Tank	5/15/95	11:00 PM	$0.50 E		04/01	11:00 PM	($5.95)				
Route Totals:	**Joe's Route**				**$628.55**	**11 ANI's**			**$316.85**	**4**	**46**		**22**
									488		83	316	

1. Hit List by Route

This report contains a listing of phones that might need attention. The report displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include the following:

Contact type	Select the phone information to be displayed based on the type of contact made with the phones. Choose from: All Contacts, Incoming, Manual (Poll), or (Auto) Polled.
Select on alarms [*list of alarms*]	Selects ANIs that have the selected alarms turned *on*. You can also indicate that all phones with the selected alarms are *not* listed.
Cashbox amount greater than [$135.00]	Selects ANIs with amounts greater than the selected amount.
Totalizer change less than [$1.00]	Selects ANIs with a totalizer change less than the selected amount.
No contact since [specified dates]	Selects ANIs that have had no contact since a specified date and time.
Variables	Selects ANIs with user-defined phone, site, or group code variables.

This report examines the most recent contact with each payphone and compares it with the previous contact for that phone. Based on your selection of alarms to use or to ignore, alarms set to *on* at the most recent contact with the phone will cause its ANI to be selected for processing.

If the totalizer amount has not changed between the last two contacts with the phone, it might indicate a phone needing attention. If the totalizer changed by less than $1.00 (the default), the ANI is selected for printing. You can vary the totalizer change amount to whatever value you like.

If the cashbox amount reported by the payphone is over $135.00 (the default), the ANI is selected for printing. You can set the cashbox threshold to some other dollar amount. By setting the $135.00 cashbox threshold to $0.00, you can force all of your ANI's to print.

<table>
<tr><td colspan="3">Did Not Report by Route</td><td><i>5/2/96</i></td><td><i>Page 1</i></td></tr>
<tr><td colspan="3"></td><td colspan="2"><i>2:10 PM</i></td></tr>
<tr><td colspan="5">5/2/96 through 5/2/96</td></tr>
</table>

							Contact prior to 5/2/96		
ANI	ID	Location	First Call	Last Call	Date	Time	Cashbox	Box @ Collect	Totalizer
Route:	Joe's Route								
Site:	Bob's Big Burger		4455 Burger Rd. Burgerville, PA 44556				Bob Burger		
(305) 555-9172	2569	Bathroom	8/24/96	9/27/96	9/27/96	4:37 AM	$7.00	$0.00	$20.30
(904) 555-9808	2527	Bus Stop	9/7/96	9/16/96	9/16/96	4:34 AM	$10.90	$0.00	$10.90
(904) 555-9816	2527	Outside	9/15/96	9/27/96	9/27/96	4:22 AM	$28.25	$0.00	$28.25
Site Totals: Bob's Big Burger			3 ANI's				$46.15	$0.00	$59.45
Site:	Ana Coffee Shop		1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989				Ana Cesse		
(305) 555-8337	9527	Lounge	6/1/96	10/3/95	10/3/95	10:37 AM	$72.65	$0.00	$219.65
(305) 555-9722	1809	Booth	7/1/96	10/3/95	10/3/95	10:39 AM	$97.10	$0.00	$296.85
(305) 555-9998	5488	Inside	6/1/96	10/3/95	10/3/95	11:44 AM	$93.20	$0.00	$2,423.00
Site Totals: Ana Coffee Shop			3 ANI's				$262.95	$0.00	$2,939.50
Site:	Ana Fashions		Waterfall Mall Miami, FL 33980				Ana Smith		
(305) 555-9543	1166	outside Pe	8/31/96	9/27/96	9/27/96	4:28 AM	$137.00	$0.00	$137.00
Site:	Aquino Laundry		5th street Route 1 S.Miami, FL 39980				Ray Aquino		
(407) 555-9172	1233	Bathroom	8/1/96	10/3/95	10/3/95	10:42 AM	$24.30	$0.00	$539.20
Site:	El Barrilito		Calle 8, 3rd Ave. Miami, FL 33980				Juan Valdez		
(305) 555-9406	9909	outside Pe	9/10/96	9/27/96	9/27/96	4:18 AM	$17.25	$0.00	$17.25
Site:	El Dorado		Dorado Avenue Sarasota, FL 59980				Dorado Corp.		
(305) 555-9714	4444	Jewelers 2	4/1/96	9/27/96	9/27/96	4:02 AM	$140.40	$0.00	$718.25
Site:	Luis Mobil		Corner of Ash and Oak Street Miami, FL 33908				Luis Hernandez		
(305) 555-9071	9237	Gas Tank	12/1/95	5/15/95	5/15/95	11:00 PM	$0.50	$0.45	$4.00
Route Totals: Joe's Route			11 ANI's				$628.55	$0.45	$4,414.65

2. Did Not Report by Route

This report contains a listing of phones that you did not contact during a specified date range. This report displays records in order by route, then by site, and then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, Silent Dates, Notes, and specific alarm codes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Selection criteria specific to this report include the following:

Silent Date is between (date)	Selects the list of phones that were not contacted during this specific date range.
Specific Alarm [alarm]	Selects the specified alarm.
Variables	Selects the phone, site, and group code variables you want included in this report.

The printed report enables you to see which phones were not contacted on a specific day. The most likely use for this report is to find phones that you attempted to poll but could not contact for whatever reason. You should run this report as soon as possible after a polling list is polled.

This report contains the site name, address, contact ANI, ID, date of most recent contact, and the information taken from the phone during contact prior to the date range you selected. This should aid in troubleshooting the phone.

The **SPECIFIC ALARM CODE** field can be used to track phones that were supposed to have been collected but were not collected or were not cleared by the collector. For example, if all phones on route number 2 were supposed to have been collected Monday or Tuesday, you can run this report for route 12 on Wednesday and see if any phones did not report alarm code C on Monday or Tuesday. If you find any, you can take the necessary steps to remedy the situation. This field also can be used to track other alarms.

Contacts by Day - One Month - by Route *8/2/96*   *Page 1*

2:10 PM

06/96

Route: Rob's Route
Site: El Dorado   Dorado Avenue   Sarasota, FL 59980   Dorado Corp.
(305) 555-9714   4444   Jewelers 2

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			31 4:15 AM Box: $3.75 Total: $3.75 Change: $3.75 Collect: $0.00 Coin: 15 Operator: 3 Around: 3 Other: 1	**1** 4:16 AM Box: $4.00 Total: $4.00 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0	**2** 4:16 AM Box: $4.00 Total: $4.00 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0	**3** 4:18 AM Box: $4.00 Total: $4.00 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0
4 4:14 AM Box: $4.00 Total: $4.00 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0	**5** 4:14 AM Box: $4.25 Total: $4.25 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0	**6** 4:30 AM Box: $4.25 Total: $4.25 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0	**7** 4:16 AM Box: $4.25 Total: $4.25 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0	**8** 4:17 AM Box: $4.50 Total: $4.50 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0	**9** 4:17 AM Box: $5.25 Total: $5.25 Change: $0.75 Collect: $0.00 Coin: 3 Operator: 0 Around: 0 Other: 0	**10** 4:18 AM Box: $5.80 Total: $5.80 Change: $0.55 Collect: $0.00 Coin: 2 Operator: 0 Around: 2 Other: 0
11 4:14 AM Box: $8.05 Total: $8.05 Change: $2.25 Collect: $0.00 Coin: 9 Operator: 2 Around: 1 Other: 0	**12** 4:12 AM Box: $8.05 Total: $8.05 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0	**13** 4:15 AM Box: $9.55 Total: $9.55 Change: $1.50 Collect: $0.00 Coin: 6 Operator: 6 Around: 5 Other: 0	**14** 4:16 AM Box: $9.80 Total: $9.80 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0	**15** 4:17 AM Box: $10.05 Total: $10.05 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0	**16** 4:16 AM Box: $10.30 Total: $10.30 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0	**17** 4:17 AM Box: $12.80 Total: $12.80 Change: $2.50 Collect: $0.00 Coin: 10 Operator: 1 Around: 1 Other: 1
18 4:17 AM Box: $12.80 Total: $12.80 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0	**19** 4:13 AM Box: $13.30 Total: $13.30 Change: $0.50 Collect: $0.00 Coin: 2 Operator: 0 Around: 0 Other: 0	**20** 4:30 AM Box: $1.50 Total: $14.80 Change: $1.50 Collect: $0.00 Coin: -47 Operator: -12 Around: -12 Other: -2	**21** 4:17 AM Box: $1.75 Total: $15.05 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 1	**22** 4:16 AM Box: $4.50 Total: $17.80 Change: $2.75 Collect: $0.00 Coin: 9 Operator: 1 Around: 0 Other: 0	**23** 4:17 AM Box: $4.75 Total: $18.05 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0	**24** 4:18 AM Box: $6.00 Total: $19.30 Change: $1.25 Collect: $0.00 Coin: 5 Operator: 3 Around: 1 Other: 1
25 4:15 AM Box: $6.00 Total: $19.30 Change: $0.00 Collect: $0.00 Coin: 0 Operator: 0 Around: 0 Other: 0	**26** 4:13 AM Box: $6.75 Total: $20.05 Change: $0.75 Collect: $0.00 Coin: 3 Operator: 2 Around: 0 Other: 0	**27** 4:37 AM Box: $7.00 Total: $20.30 Change: $0.25 Collect: $0.00 Coin: 1 Operator: 0 Around: 0 Other: 0				

3. Contact by Day -- One Month -- by Route

This report contains a listing of phones that shows you the status of your phones on every day of a particular month. This report displays records in order by route, then by site, then by ANI. The information is displayed in a calendar format. You can control the range of records contained in the report by defining the routes, sites, ANIs, Dates, and Notes to be included in the report. If you did not poll a phone on a particular day, that day is left blank.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Selection criteria specific to this report include the following:

Month/Year to Include (Month and Year)   Selects ANIs for the specified month and year.

Totalizer [Actual or Month to Date]   Selects ANIs with a Totalizer amount that is the actual or month-to-date dollar amount.

Variables   Selects ANIs with user-defined phone, site, or group code variables.

This report enables you to easily keep a record of your phones in the smallest possible manner. On just 12 pieces of paper (one for each month), you can keep a complete history of call traffic, cashbox collections, and board changes made throughout the year.

In order to properly print, you should poll your phones every day. If you miss a day, that day is blank and the next day shows two day's worth of traffic and receipts. The Change column denotes the change in the totalizer from the previous day's poll, while the Collect column denotes the reported cashbox collections.

After the site name, address, and contact are printed, every ANI at that particular site is printed, one ANI per page.

Totalizer Delta Selections by Route

5/2/97   *Page 1*

2:54 PM

6/1/96 vs. 7/1/96 30 Days
$0.00 < Totalizer Change < $99,999.99

ANI	ID	Location	Amount 1	Amount 2	Difference	Daily Average
Route:	Joe's Route					
Site:	Ana Coffee Shop	1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989			Ana Cesse	
(305) 555-8337	9527	Lounge	$315.80	$595.30	$279.50	$9.32
(305) 555-9998	5488	Inside	$329.70	$624.60	$294.90	$9.83
Site Totals:	Ana Coffee Shop	2 ANI's	$645.50	$1,219.90	$574.40	$19.15
Site:	El Dorado	Dorado Avenue Sarasota, FL 59980			Dorado Corp	
(305) 555-9714	4444	Jewelers 2	$226.00	$336.05	$110.05	$3.67
Site:	Luis Mobil	Corner of Ash and Oak Street Miami, FL 33908			Luis Hernandez	
(305) 555-9071	9237	Gas Tank	$68.80	$105.15	$36.35	$1.21
Route Totals: Joe's Route		4 ANI's	$940.30	$1,661.10	$720.80	$24.03

4. Totalizer Delta Selections by Route

This report contains a listing of phones that have a prescribed change in totalizer amounts within a selected date range. It displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and notes to be used in building the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include:

Earliest date	Selects ANIs after the specified date. Any date preceding this date is skipped.
Latest date	Selects ANIs before the specified date. Any date after this date is skipped.
Lowest amount	Selects ANIs with more than the specified dollar amount. Any phone with a totalizer change lower than this amount is skipped.
Highest amount	Selects ANIs with less than the specified dollar amount. Any phone with a totalizer change higher than this amount is skipped.
Variables	Selects ANIs with the phone, site, and group code variables you want included in this report.

The report is designed to let you see the amount of coin collected by a phone over a specified time period. **In order to properly print, you must have polled your phones on the two selected dates.** If you did not poll on both days, the ANI does not print. In addition to the totalizer on each of the two days, the difference between the two is calculated and the daily average coin receipts are computed.

This report can be used to find out the actual coin activity for a given phone over an entire month. By running the report from June 1 through July 1 (assuming you poll just after midnight), you can get the actual coin receipts for the month from your phones without having to collect the phones.

By entering $100.00 in the lowest dollar amount and $9999.99 in the highest dollar amount, you can get a report showing only those phones that made at least $100.00 in the selected time period. By entering $0.01 in the lowest dollar amount and $50.00 in the highest dollar amount, you can get a report showing only phones that made less than $50.00 in the selected time period. This might be a list of phones you should consider moving to a better location.

The Hit List Tickets by Route   *5/7/96*   *Page 4*

11:23 AM

Route: Rob's Route	

Site: Ana Coffee Shop	**Contact:** Ana Cesse
1702 S. 36 Street	**Phone:** (356) 551-2765
2nd Floor	**Upper Key:** 0000000000
	Lower Key: 0000000000
S.Bernardo, FL 39989	**Serial No**:
Lounge	

(305) 555-8337   9527   **Last Contact:** 10/3/95 10:37 AM   **Cashbox:** $72.65   **Alarms:** R

ELCOTEL
TELECOMMUNICATIONS

WO# _____

Parts Replaced:

_____Handset	_____Board
_____Keypad	_____Coin Mech.
_____Battery	_____Software_____
	_____Other _____

Test Calls:

_____1 + 10 Coin Sent Test Carrier	_____611 to Service Desk
_____1 + 7 Coin Sheet	_____Local Information Free
_____$.40 Call Test Counter	_____Long Distance Information $.75
_____$.25 Local	_____Upper Housing Card
_____00-	_____Lower Housing Card
_____0 + 7 Operator Call	_____Phone and Enclosure Clean
_____0 + 10 Operator Call	_____Light Works
_____10XXX	_____RJ-11 Secure (SN-1)
_____Ring No Answer Test Coin Return	_____Busy Test Coin Return
_____O- Operator 'This is a test call, my password is'	

Comments: _____
_____
_____
_____

Technician: _____

Customer Signature: _____

Date: _____   WO# _____
Location: _____
Coin Count: _____
Technician: _____

---

5. Hit List Tickets by Route

This report contains a listing of phones that might need attention and displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include the following:

Select on alarms [*list of alarms*]	Selects ANIs that have the selected alarms turned *on*. You can also indicate that all phones with the selected alarms are *not* listed.
Cashbox amount greater than [$135.00]	Selects ANIs with amounts greater than the selected amount.
Totalizer change less than [$1.00]	Selects ANIs with a totalizer change less than the selected amount.
No contact since [specified dates]	Selects ANIs that have had no contact since a specified date and time.
Variables	Selects ANIs with user-defined phone, site, or group code variables.

This report examines the most recent contact with each payphone and compares it with the previous contact for that phone. Based on your selection of alarms to use or to ignore, alarms set to *on* at the most recent contact with the phone will cause its ANI to be selected for processing.

If the totalizer amount has not changed between the last two contacts with the phone, it might indicate a phone needing attention. If the totalizer changed by less than $1.00 (the default), the ANI is selected for printing. You can vary the totalizer change amount to whatever value you like.

If the cashbox amount reported by the payphone is over $135.00 (the default), the ANI is selected for printing. You can set the cashbox threshold to some other dollar amount. By setting the $135.00 cashbox threshold to $0.00, you can force all of your ANI's to print.

After the site name, address, and contact are printed, every ANI at that particular site is printed. The most recent poll date and time, the last cashbox amount, and the alarm status are printed. The bottom 3/4 of the page is user definable. You can put any text that you want to print here by editing a file called RPT07.DOC, which is a Microsoft Word document. You can change this document to suit your needs.

The theory behind this style of printing is that your technicians can take a stack of tickets and begin their daily routes. Once at a particular phone, they can easily record such items as what they did, how long it took, and the test calls and results of those calls. The format of the lower 3/4 of the page is up to you. Once the technician returns to the office, the tickets can be handed back and the information can be entered into the cost accounting system. In this manner, you have an accurate record of all trips to a phone, and you can track all maintenance and repair costs.

Work Orders Report by Route   *5/7/1996   Page 1*
12:41 PM

Route: Rob's Route

  Site: Luis Mobil   Corner of Ash and Oak Street   Miami, FL 33908   Luis Hernandez

Phone: (305) 555-9071   9237   Gas Tank

WO #: 6   **Problem:** Phone Doesn't Work   **Open:** 2/23/96 8:43:00 AM **Closed:**   **Tech:** Dr. Cook

   Action: **Date:**

ELCOTEL
TELECOMMUNICATIONS

WO# _____

Parts Replaced:

_____Handset   _____Board
_____Keypad   _____Coin Mech.
_____Battery   _____Software_____
                     _____Other _____

Test Calls:
_____1 + 10 Coin Sent Test Carrier   _____611 to Service Desk
_____1 + 7 Coin Sheet   _____Local Information Free
_____$.40 Call Test Counter   _____Long Distance Information $.75
_____$.25 Local   _____Upper Housing Card
_____00-   _____Lower Housing Card
_____0 + 7 Operator Call   _____Phone and Enclosure Clean
_____0 + 10 Operator Call   _____Light Works
_____10XXX   _____RJ-11 Secure (SN-1)
_____Ring No Answer Test Coin Return   _____Busy Test Coin Return
_____O- Operator 'This is a test call, my password is'

Comments: _____
_____
_____
_____

Technician: _____

Customer Signature: _____

Date: _____   WO# _____
Location: _____
Coin Count: _____
Technician: _____

6. Work Order Reports by Route

This report contains a printout of a trouble ticket for a payphone. The report is divided into two parts. The upper part of the report contains basic information about a payphone taken directly from the database. The lower part of the report is user-defined and contains whatever data and format you want to enter. The text is contained in a file named RPT07A.DOC, which is a Microsoft Word document. You can change this document to suit your needs.

In this format, one work order per page will print. You can suppress the lower part of the report. Using this format, multiple work orders will print on a single page.

You can control the report by using the search criteria described in Section 8.9.1, *Selecting Search Criteria*. Selection criteria specific to this report include the following:

Print Open Work Orders Only   Prints only open work orders.

Print Closed Work Orders Only   Prints only closed work orders.

Include User.DOC file   Prints the bottom 3/4 of the page.

Variables   Selects any work order with a user-defined phone, site, or group code variable.

Work Orders are printed in order by route for each technician.

Payphones are selected for printing on this report if they have an outstanding work order against them. Until a Work Order is closed by an action that corrects the reported problem with a payphone, that phone will list out on this report, with one page per problem being generated.
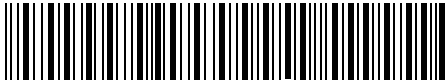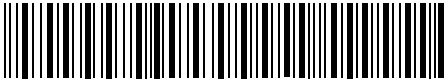
Description of Reports

Phone Master Report by Route   *12/3/96*   *Page 1*

10:49 AM

ANI	ID	Location	Last Call	Keys		Serial #	Group	Notes
Route:	Joe's Route							
Site:	Bob's Big Burger		4455 Burger Rd. Burgerville, PA 44556				Bob Burger	
(305) 555-9172	2569	Bathroom	9/27/96	0000000000	0000000000			
(904) 555-9808	2527	Bus Stop	9/16/96	0000000000	0000000000			
(904) 555-9816	2527	Outside	9/27/96	0000000000	0000000000			
(999) 999-9999	9999	dummy fon		0000000000	0000000000	999999999		
Site Totals:		4 ANI's						
Site:	Ana Coffee Shop		1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989				Ana Cesse	
(305) 555-8337	9527	Lounge	10/3/95		0000000000	0000000000		
(305) 555-9722	1809	Booth	10/3/95		0000000000	0000000000		
(305) 555-9998	5488	Inside	10/3/95		0000000000	0000000000		
Site Totals:		3 ANI's						
Route Totals:		7 ANI's						

**Section A
Normal Version**

Phone Master Report by Route   *12/3/96*   *Page 1*

11:16 AM

ANI	ID	Location	Last Call	Keys		Serial #	Group	Notes
Route:	Joe's Route							
Site:	Bob's Big Burger		4455 Burger Rd. Burgerville, PA 44556				Bob Burger	
(305) 555-9172	2569	Bathroom	9/27/96	0000000000	0000000000			
(904) 555-9808	2527	Bus Stop	9/16/96	0000000000	0000000000			
(904) 555-9816	2527	Outside	9/27/96	0000000000	0000000000			
(999) 999-9999	9999	dummy fon		0000000000	0000000000	999999999		
Site:	Ana Coffee Shop		1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989				Ana Cesse	
(305) 555-8337	9527	Lounge	10/3/95	0000000000	0000000000			
(305) 555-9722	1809	Booth	10/3/95	0000000000	0000000000			
(305) 555-9998	5488	Inside	10/3/95	0000000000	0000000000			
Site:	Ana Fashions		Waterfall Mall Miami, FL 33980				Ana Smith	
(305) 555-9543	1166	outside Pe	9/27/96	0000000000	0000000000			
Site:	Aquino Laundry		5th street Route 1 S.Miami, FL 39980				Ray Aquino	
(407) 555-9172	1233	Bathroom	10/3/95	0000000000	0000000000			
Site:	El Barrilito		Calle 8, 3rd Ave. Miami, FL 33980				Juan Valdez	
(305) 555-9406	9909	outside Pe	9/27/96	0000000000	0000000000			
Site:	El Dorado		Dorado Avenue Sarasota, FL 59980				Dorado Corp.	
(305) 555-9714	4444	Jewelers 2	9/27/96	0000000000	0000000000			
Site:	Luis Mobil		Corner of Ash and Oak Street Miami, FL 33908				Luis Hernandez	
(305) 555-9071	9237	Gas Tank	5/15/95	0000000000	0000000000			

**Section B
Compressed
Version**

---

(407) 555-9879   2/21/96   Rte: Joe's   Key: 0000000000
Miami Clutch & Brakes   right side
333 Main Street   ID 9879
                                          MAP:

(305) 555-8152   2/21/96   Rte: Joe's   Key: 0000000000
The Bootery Whse   outside Pe
1702 S. 36 Street   ID 9207

**Section C
Labels Version**

(305) 555-9722   2/21/96   Rte: Joe's   Key: 0000000000
Ana Coffee Shop   Booth
1702 S. 36 Street   ID 1809
2nd Floor   MAP:

(305) 555-9998   2/21/96   Rte: Joe's   Key: 0000000000
Ana Coffee Shop   Inside
1702 S. 36 Street   ID 5488
2nd Floor   MAP:

---

7. Phone Master Report by Route

This report contains a listing of basic data from your database and can be printed in three different formats, ordered by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, notes, and the most recent cashbox amount. This is not an accounting type report since it does not include any cashbox or totalizer information.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Controls that are specific to the Phone Master by Route screen include:

Cashbox amount over a specified amount. You can specify the phones to be selected for processing by indicating a minimum cashbox amount at the last contact to be processed.

The default format is referred to as the **Normal** version. As you can see by looking at section A, this version contains a site name along with the site address and the contact at that particular site. Every ANI located at that site is then printed, showing the most recent contact date with the ANI, the keys for the cashbox and upper housing, the serial number, the type of installation, and any notes that have been entered into the database record.

The second version, called the **Compressed** version, contains the same information as the Long version. The major difference is that there are no titles and no blank lines between routes and sites. While this layout might be tougher to read, you can print three times as many phones on a page. This layout is depicted in section B.

The third version, referred to as **Labels**, contains information about each ANI on a 1" by 4" label, either in a one-up, two-up, or three-up format. The two-up format is depicted in section C.

You can use labels for file folders or to aid in cashbox accounting. With the capability to print the labels on a route by route basis and only if the cashbox amount is over a certain threshold, you can print the labels, pull the keys that are depicted on the labels, and send your collector on his way.

Once at the site, the collector can place the label on an empty cashbox, remove the old cashbox, and install the new cashbox. The old cashbox is then forwarded to the accounting group. By looking at the label, the accounting group can see where the box came from and when it was originally installed.

If desired, the barcoded ANI can be read into a coin counting machine, the box dumped and counted, and the resulting figures entered into the cost accounting function. A report that compares the actual coin count to the amount reported by the phone can then be run, and any discrepancies can be noted and addressed.

<div style="border">

Seven Day History by Route *9/12/1996* *Page 1*

3:07 PM

Totalizer changes by day

ANI	ID	Location	Last Cashbox	9/10/96 Sat	9/9/96 Fri	9/8/96 Thu	9/7/96 Wed	9/6/96 Tue	9/5/96 Mon	9/4/96 Sun	9/3/96 Sat
Route: Joe's Route											
Site: Bob's Big Burger			4455 Burger Rd. Burgerville, PA 44556						Bob Burger		
(305) 555-9172	2569	Bathroom	$7.00	$0.55	$0.75	$0.25	$0.00	$0.00	$0.25	$0.00	$0.00
(904) 555-9808	2527	Bus Stop	$10.90	$0.50	$0.25	$1.55	($0.95)	$0.00	$0.00	$0.00	$0.00
Site Totals: Bob's Big Burger											
		2 ANI's	$7.00	$1.05	$1.00	$1.80	$3.30	$0.00	$0.25	$0.00	$0.00
Site: Ana Coffee Shop			1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989						Ana Cesse		
(305) 555-8337	9527	Lounge	$72.65	$7.00	$7.50	$13.90	$3.50	$0.25	$0.50	$0.00	$5.25
(305) 555-9722	1809	Booth	$97.10	$11.75	$11.75	$11.25	$15.50	$4.50	$11.30	$9.55	$16.50
(305) 555-9998	5488	Inside	$93.20	$12.60	$23.45	$11.80	$11.05	$7.10	$10.25	$15.95	$14.25
Site Totals: Ana Coffee Shop											
		3 ANI's	$262.95	$31.35	$42.70	$36.95	$30.05	$11.85	$22.05	$25.50	$36.00
Site: Ana Fashions			Waterfall Mall Miami, FL 33980						Ana Smith		
(305) 555-9543	1166	outside Pe	$137.00	$6.50	$7.75	$5.00	$9.50	$3.25	$1.50	$6.50	$5.75
Site: Aquino Laundry		5th street Route 1	S.Miami, FL 39980						Ray Aquino		
(407) 555-9172	1233	Bathroom	$24.30	$3.10	$2.25	$1.25	$2.25	$0.25	$0.75	$0.80	$0.25
Site: El Barrilito		Calle 8, 3rd Ave.	Miami, FL 33980						Juan Valdez		
(305) 555-9406	9909	outside Pe	$17.25	($20.55)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Site: El Dorado		Dorado Avenue	Sarasota, FL 59980						Dorado Corp.		
(305) 555-9714	4444	Jewelers 2	$140.40	$10.00	$7.75	$7.75	$6.50	$0.00	$0.00	$2.75	$7.00
Site: Luis Mobil		Corner of Ash and Oak Street	Miami, FL 33908						Luis Hernandez		
(305) 555-9071	9237	Gas Tank	$0.50	$1.25	$0.25	$0.25	$0.75	$0.50	$0.75	$1.50	$2.50
Route Totals: Joe's Route											
		10 ANI's	$572.15	$54.50	$61.70	$53.00	$52.35	$15.85	$25.30	$37.05	$51.50

</div>

8. Seven Day History by Route

This report contains a listing of phones that shows you the change in totalizer amounts for each of the preceding seven days. It displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, Dates, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Selection criteria specific to this report are:

Latest date to include [date]	Selects ANIs with a date earlier than the specified date.
Print Totalizer Amount?	Determines whether the totalizer amount is printed.
Print Cashbox Amount?	Determines whether the cashbox amount is printed.
Variables	Selects ANIs with the phone, site, and group code variables you want included in this report.

This report was designed to let you see the amount of coin collected by a phone on a day-to-day basis. In order for this report to properly work, you must poll your phones each day. If you miss a day, that day will show 0.00, and the next day will show two day's worth of receipts.

In addition to the totalizer changes, the last reported cashbox is printed so you have an idea about how much coin is currently in the phone and whether it might need to be collected.

After the site name, address, and contact is printed, every ANI at that site is printed. You also have the option to print site totals.

Actual vs. Reported Coin by Route *9/7/96* *Page 1*
3:18 PM

				Acct Code	**100**	Phone Reported			
ANI	**ID**	**Location**		**Date**	**Amount**	**Date**	**Amount**	**Difference**	**Flag**
Route:	Joe's Route								
Site:	Bob's Big Burger		4455 Burger Rd. Burgerville, PA 44556			Bob Burger			
(305) 555-9172	2569	Bathroom		2/27/95	$50.00	8/24/96	$2.50	($47.50)	
(305) 555-9172	2569	Bathroom		3/3/95	$0.00	8/25/96	$1.25	$1.25	
(305) 555-9172	2569	Bathroom			$0.00	8/26/96	$2.50	$0.00	
(305) 555-9172	2569	Bathroom			$0.00	8/27/96	$3.75	$0.00	
(305) 555-9172	2569	Bathroom			$0.00	8/28/96	$2.50	$0.00	
Site:	Luis Mobil		Corner of Ash and Oak Street	Miami, FL 33908		Luis Hernandez			
(305) 555-9071	9237	Gas Tank			$0.00	4/1/95	$0.90	$0.00	
(305) 555-9071	9237	Gas Tank			$0.00	5/15/95	$0.45	$0.00	
Route Totals:	Joe's Route	2 ANI's			$50.00		$13.85	($46.25)	

9. Actual versus Reported Coin by Route

This report displays the most recent cashbox collection amount and compares that date and dollar amount to the date and amount reported by the phone. This report displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Records are flagged if one of the following is true:

The dates differ by more than [number of days] days   Selects ANIs with dates that differ by more than the specified number of days.

The amount differs by more than [$0.00]   Selects ANIs with dollar amounts that differ by more than the specified number of dollars.

You are prompted for the cost accounting code to search for, as well as two conditions to flag the collection for further inspection. The first condition is if the two coin counts vary by more than a certain dollar amount. This difference should always be a very small number.   The second condition is if the dates of the two records are too far apart.

In theory, within one day of when the phone reported that it was emptied, the cost accounting file entry should be created. This error condition might signal that the phone did not report in properly or that the actual coin collection was never entered.

In addition to saving you hours of time in doing this comparison, this report points out possible problem areas in your cash box collection systems.

Seven Day Exception Only by Route *9/12/96* *Page 1*
3:20 PM

Totalizer changes by day exceptions only
50.00% under normal or 2 times normal

ANI	ID	Location	Last Cashbox	9/10/96 Sat	9/9/96 Fri	9/8/96 Thu	9/7/96 Wed	9/6/96 Tue	9/5/96 Mon	9/4/96 Sun	9/3/96 Sat
Route:		Joe's Route									
Site:	Bob's Big Burger			4455 Burger Rd. Burgerville, PA 44556					Bob Burger		
(305) 555-9172	2569	Bathroom	$7.00	$0.55	$0.75	$0.25	$0.00	$0.00	$0.25	$0.00	$0.00
Site:	Aquino Laundry			5th street Route 1	S.Miami, FL 39980				Ray Aquino		
(407) 555-9172	1233	Bathroom	$24.30	$3.10	$2.25	$1.25	$2.25	$0.25	$0.75	$0.80	0.25
Site:	El Barrilito			Calle 8, 3rd Ave.	Miami, FL 33980				Juan Valdez		
(305) 555-9406	9909	outside Pe	$17.25	($20.55)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Route:		5,6,7, and 8th Street									
Route:		Bridge and Overpass									
Route:		Centre Shopping Area									

10. Seven Day Exception Only by Route

This report displays a list of phones that have had exceptional totalizer changes over a selected seven day period. This report displays records in order by route, then by site, then by ANI. An ANI prints only if the amount on day seven is more than twice the average of the seven days or less than half the average of the seven days. You can control the range of records contained in the report by defining the routes, sites, ANIs, Dates, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Selection criteria specific to this report include the following:

Latest date to include [Date]	Selects ANIs with a date earlier than the specified date.
Print Totalizer Amount?	Determines whether the totalizer amount is printed.
Print Cashbox Amount?	Determines whether the cashbox amount is printed.
Print if Revenue is less than [50.00%] of normal	Prints ANIs with a the revenue that is less than 50% of what is normally expected from the phone.
Print if Revenue is greater than [2] times normal	Prints ANIs with a revenue that is less than two times what is normally expected from the phone.
Variables	Selects ANIs with the user defined phone, site, and group code variables.

This report was designed to catch phones that did not have enough income. If a phone normally takes in $10 per day, and it only takes in $4, there might be a problem. In order to properly print, you must poll your phones every day. If you miss a day, that day shows 0.00, and the next day shows two days worth of receipts. While this does not hurt the average calculation, the amount will be $0.00 and the phone will print if you do not poll on day 7.

In addition to the totalizer changes, the last reported cashbox is printed so that you know approximately how much money is currently in the phone and whether it needs to be collected.

After the site name, address, and contact are printed, every ANI at that site is printed. You also have the option to print site totals.

Cashbox Nearing Full by Route

10/2/96
3:37 PM

Page 1

Totalizer changes by day
Projected $135.00 within 2 days

ANI	ID	Location	Cashbox 9/10/96 Sat	Average Daily Receipts	Days until $135.00
Route:	Bridge and Overpass				
Site:	Tony's Market		399 east boulevard	Miami, FL 39980	Tony Alzano
(305) 555-9613	9809	outside Pe	$142.70	$12.23	0.0

11. Cashbox Nearing Full by Route

This report displays the phones that might require cashbox servicing in the near future. This report displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, Dates, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Selection criteria specific to this report include the following:

Latest Date to Include [date]	Selects ANIs with a date within seven days before the specified date.
Cashbox threshold [$135.00]	Selects ANIs with the specified threshold amount. Used in conjunction with number of days to reach full.
Number of Days to Reach Full [2]	Selects ANIs that might reach full within the next two days.
Variables	Selects ANIs that have the user defined phone, site, or group code variables.

This report enables you to see any phones that might need to be visited in the next few days.   An average daily coin income is calculated. Based on the cashbox threshold that you enter and the number of days to reach that threshold, a phone is printed if that dollar amount is exceeded.

For example, you might have a phone that has $120 in the cashbox. If the phone only averages $1.50 per day in coin revenue, it does not need to be emptied for quite some time. On the other hand, you might have a phone that has $98 in the cashbox. If this phone averages $20 per day in receipts, you need to visit it fairly soon.

If you run the report on a Thursday with defaults of $135 and 2 days, you should get an accurate list of phones that need to be emptied before the weekend.

Site	ID	Cashbox	Totalizer	
		User Configurable Report		*5/7/96* *Page 1*
				1:46 PM
Ana Fashions	1166	$137.00	$137.00	
Aquino Laundry	1233	$24.30	$539.20	
Camelot	1524	$50.25	$406.10	
Ana Coffee Shop	1809	$97.10	$296.85	
Bob's Big Burger	2527	$10.90	$10.90	
Joe's Jumbalya	2527	$28.25	$28.25	
Betty's Boutique	2569	$7.00	$20.30	
Mar-y-tierra	3452	$2.00	$575.85	
El Dorado	4444	$140.40	$718.25	
Miami Clutch & Brakes	4555	$85.95	$127.90	
Ana Coffee Shop	5488	$93.20	$2,423.00	
Mar-y-tierra	6657	$2.75	$79.05	
Zodiac Restaurant	8998	$52.85	$186,836.55	
The Bootery Whse	9297	$145.95	$588.25	
Family Coin Laundry	9509	$107.65	$1,963.90	
Ana Coffee Shop	9527	$72.65	$219.65	
Tony's Market	9809	$0.25	$0.55	
El Barrilito	9909	$17.25	$17.25	
Report Totals:	22 ANI's	**Cashbox**: $1,149.95	**Totalizer:** $195,155.85	

12. User Configurable Report

This report contains a user defined and formatted list of phone information and can display basic data in your database in an almost unlimited number of formats. The sort sequence of the database and the information printed on the report are user definable. You can also modify the line spacing when you run this report and specify whether the data should be separated by horizontal lines.

The **AVAILABLE FIELDS** list box lists the information you can include in your report. To select a field you want to include in your report, click on the field and then click on **ADD**. The field is copied to the **SELECTED FIELDS** window. If you have multiple fields in the **SELECTED FIELDS** window (you can select a maximum of 5 fields), they appear horizontally in the report in the order they are listed in this window (i.e., Site, ID, Cashbox, Totalizer). You can use the **SWAP** buttons to switch the horizontal order in which they appear.

You also need to select the field that determines the vertical order in which the fields will display in your report (e.g., in order by ANI). Click on the field in the **AVAILABLE FIELDS** list box and then click on **ORDER**. The field is copied to the **ORDER BY** window.

You can use the **SETTINGS FOR REPORT** window to select how you want your report to look.   You also can change the title of your report by entering it in the **TITLE** window.

			Contact Report by Route				*8/3/96*			*Page 1*	
							11:30 AM				
			10/1/95 through 7/31/96								

Contact Report by Route — 8/3/96 11:30 AM — Page 1
10/1/95 through 7/31/96

ANI	ID	Location	Date	Time	Cashbox	@Collect	Totalizer	Alarms	LCoin/OCoin	Zero+/Zero-	Around/Other

Route: Joe's Route

Site: Ana Coffee Shop — 1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989 — Ana Cesse

ANI	ID	Location	Date	Time	Cashbox	@Collect	Totalizer	Alarms	LCoin	OCoin	Zero+	Zero-	Other
(305) 555-8337	9527	Lounge	6/1/96	3:57 AM	$73.25	$0.00	$315.80	225	11	85	32	204	14
(305) 555-8337	9527	Lounge	7/1/96	3:54 AM	$0.50	$0.00	$595.30	2	0	1	0	0	0
(305) 555-9722	1809	Booth	7/1/96	3:57 AM	$0.75	$0.00	$145.75	3	0	1	0	1	0
(305) 555-9998	5488	Inside	6/1/96	3:56 AM	$80.00	$0.00	$329.70	241	11	76	20	152	7
(305) 555-9998	5488	Inside	7/1/96	3:59 AM	$0.00	$0.00	$624.60	0	0	0	0	0	0
Site Totals: Ana Coffee Shop		3 ANI's			$154.50	$0.00	$2,011.15	471	22	163	52	357	21

Site: El Dorado — Dorado Avenue   Sarasota, FL 59980 — Dorado Corp.

ANI	ID	Location	Date	Time	Cashbox	@Collect	Totalizer	Alarms	LCoin	OCoin	Zero+	Zero-	Other
(305) 555-9714	4444	Jewelers 2	4/1/96	3:57 AM	$20.10	$0.00	$20.10	51	3	6	4	10	0
(305) 555-9714	4444	Jewelers 2	6/1/96	3:54 AM	$70.80	$0.00	$226.00	229	6	45	35	44	5
(305) 555-9714	4444	Jewelers 2	7/1/96	4:00 AM	$66.80	$0.00	$336.05	204	7	48	21	48	15

Site: Luis Mobil — Corner of Ash and Oak Street   Miami, FL 33908 — Luis Hernandez

ANI	ID	Location	Date	Time	Cashbox	@Collect	Totalizer	Alarms	LCoin	OCoin	Zero+	Zero-	Other
(305) 555-9071	9237	Gas Tank	12/1/95	6:52 AM	$23.15	$0.00	$23.15	92	0	4	1	3	0
(305) 555-9071	9237	Gas Tank	1/1/96	6:52 AM	$67.15	$0.00	$67.15	266	0	16	2	23	5
(305) 555-9071	9237	Gas Tank	2/1/96	6:51 AM	$104.80	$0.00	$104.80	416	0	30	3	41	8
(305) 555-9071	9237	Gas Tank	3/1/96	3:51 AM	$30.05	$0.00	$143.35	559	1	46	4	58	14
(305) 555-9071	9237	Gas Tank	4/1/96	3:51 AM	$81.70	$0.00	$195.00	755	2	70	13	92	18
(305) 555-9071	9237	Gas Tank	6/1/96	3:49 AM	$68.80	$0.00	$68.80	264	1	16	11	64	20
(305) 555-9071	9237	Gas Tank	7/1/96	3:46 AM	$25.55	$0.00	$105.15	102	0	4	0	12	6

Route Totals: Joe's Route			5 ANI's			$0.00		3409		448		752	
					$713.40		$3,300.70		42		146		112

13. Contact Report by Route

This report displays any or all contacts you have had with any or all of your phones in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include the following:

Contact Date between (earliest and latest dates)	Selects ANIs for processing that were contacted between the dates entered.
Contact Time between (earliest and latest times)	Selects ANIs for processing that were contacted between the times entered.
Select Alarms	Selects ANIs for processing with alarm conditions you select.
Cashbox amount between [$000.00] and [$000.00]	Selects ANIs for processing where the amount reported in the cashbox by the phone falls between the dollar amounts entered.
Cashbox at collect between [$000.00] and [$000.00]	Selects ANIs for processing where the cashbox amount at last collection was between the dollar amounts entered.
Variables	Selects ANIs that have the user defined phone, site, or group code variables.

This is an excellent report if you want to see the status of all your phones on a given date, as depicted in section A. Sequenced by route, then by site, then by ANI, each site name prints and is followed by the contacts for every ANI located at that particular site.

Information printed includes the ANI, ID, date of contact, time of contact, current cashbox amount, amount collected at that contact, the totalizer, and all alarms. It also includes a summary of the call counters depicting local coin calls, other coin calls (long distance), 0+ calls, 0- calls, dial around (1-800, 10XXX, and 950-XXXX) calls, and all other call classifications.

A second use for this particular report, depicted in section B, is to see all of the contacts with a particular ANI over a requested date range. In this manner, you can see every contact that you have had with a phone and possibly spot trouble areas, see when the phone cashbox was collected, or determine if a certain alarm is occurring frequently.

By specifying certain alarms or dollar amounts, you can easily get a report showing you vital information. For example, by specifying cashbox amounts over $150, you can have a list of phones that should be emptied. Specifying alarm code C prints a list of all phones that were just collected. Similarly, by specifying records where the cashbox at collect amount was greater than $.01, you can get a list of phones recently collected.

ID	Location	Last Poll Date	Time	Cashbox	Alarms	Previous Poll Date	Time	Totalizer	LCoin OCoin		Zero+ Zero-		Around Other		Site
Joe's Route																
55-9172	2569	Bathroom	9/27/96	4:37 AM	$7.00		09/26	4:13 AM	$0.25	1	0	0	0	0	0	Unassigned Site
55-9808	2527	Bus Stop	9/16/96	4:34 AM	$10.90		09/15	4:36 AM	$0.50	2	0	1	0	0	1	Unassigned Site
55-9816	2527	Outside	9/27/96	4:22 AM	$28.25		09/26	4:19 AM	$0.75	3	0	0	0	0	0	Unassigned Site
55-8337	9527	Lounge	10/3/96	10:37 AM	$72.65	R	09/20	3:45 AM	$107.15	144	3	19	14	114	5	Ana Coffee Shop 1702 S. 36 Street 2nd Flo
55-9722	1809	Booth	10/3/96	10:39 AM	$97.10	R	09/27	2:27 PM	$46.30							Ana Coffee Shop 1702 S. 36 Street 2nd Flo
55-9998	5488	Inside	10/3/96	11:44 AM	$93.20	R	09/20	3:50 AM	$131.25	203	-1	46	27	141	8	Ana Coffee Shop 1702 S. 36 Street 2nd Flo
55-9543	1166	outside Pe	9/27/96	4:28 AM	$137.00		09/26	4:25 AM	$5.50	22	0	4	2	4	2	Ana Fashions Waterfall Mall Miami, FL 3
55-9172	1233	Bathroom	10/3/96	10:42 AM	$24.30	R	09/20	3:48 AM	$20.55	79	0	12	0	55	5	Aquino Laundry 5th street Route 1 S.Miam
55-9406	9909	outside Pe	9/27/96	4:18 AM	$17.25		09/26	4:15 AM	$1.00	4	0	0	0	0	0	El Barrilito Calle 8, 3rd Ave. Miami, FL 3
55-9714	4444	Jewelers 2	9/27/96	4:02 AM	$140.40		09/26	4:00 AM	$9.55	30	2	1	3	2	1	El Dorado Dorado Avenue Sarasota, FL 5
55-9071	9237	Gas Tank	5/15/96	11:00 PM	$0.50	E	04/01	11:00 PM	($5.95)							Luis Mobil Corner of Ash and Oak Street M
Totals:	Joe's Route				$628.55	11 ANI's			$316.85		4		46		22	
										488		83		316		

14. Hit List for Laser - Landscape

This report contains a listing of phones that might need attention. The report displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include the following:

Select on alarms [*list of alarms*]	Selects ANIs that have the selected alarms turned *on*. You can also indicate that all phones with the selected alarms are *not* listed.
Cashbox amount greater than [$135.00]	Selects ANIs with an amount greater than the selected amount.
Totalizer change less than [$1.00]	Selects ANIs with a totalizer change less than the selected amount.
No contact since [specified dates/times]	Selects ANIs that have had no contact since a specified date and time.
Variables	Selects ANIs that have the user defined phone, site, or group code variables.

This report examines the most recent contact with each payphone and compares it with the previous contact for that phone. Based on your selection of alarms to use or to ignore, alarms set to *on* at the most recent contact with the phone will cause its ANI to be selected for processing.

If the totalizer amount has not changed between the last two contacts with the phone, it might indicate a phone needing attention. If the totalizer changed by less than $1.00 (the default), the ANI is selected for printing. You can vary the totalizer change amount to whatever value you like.

If the cashbox amount reported by the payphone is over $135.00 (the default), the ANI is selected for printing. You can set the cashbox threshold to some other dollar amount. By setting the $135.00 cashbox threshold to $0.00, you can force all of your ANIs to print.

This report is similar to the Hit List by Route report except that it prints in landscape orientation. This allows room on the right side of the report for as much of the site name and address as will fit.

SMDR Dial Around by Route

1/7/96   *Page 1*

1/5/96 through 1/5/96   3:18 PM

ANI	ID	Date	Time	Duration in seconds	Price	Call Type	Macro	Destination - Dial Around
Route:	Joe's Route							
Site:	Ana Coffee Shop		1702 S. 36 Street 2nd Floor S. Bernardo, FL 39989					Ana Cesse
(305) 555-8337	9527	1/5/96	12:08 PM	84	$0.25	4	2	7534312-
(305) 555-8337	9527	1/5/96	12:11 PM	48	$0.00	41	5	08138223355-
(305) 555-8337	9527	1/5/96	12:12 PM	128	$0.00	9	5	1028802157238243-21553891134934215723
(305) 555-8337	9527	1/5/96	12:20 PM	81	$0.25	4	2	7536436-
(305) 555-8337	9527	1/5/96	12:31 PM	62	$0.00	10	1	18003664000-337090326432813758164
(305) 555-8337	9527	1/5/96	12:33 PM	109	$0.00	10	1	18003664000-337090326432813741093
(305) 555-8337	9527	1/5/96	12:59 PM	4	$0.00	10	1	18007807477-
(305) 555-8337	9527	1/5/96	12:59 PM	5	$0.00	10	1	18007807477-
(305) 555-8337	9527	1/5/96	1:00 PM	4	$0.00	10	1	18007807477-
(305) 555-8337	9527	1/5/96	1:01 PM	156	$0.00	10	1	18007807477-
(305) 555-8337	9527	1/5/96	1:12 PM	14	$1.00	7	8	17086066193-
(305) 555-8337	9527	1/5/96	1:37 PM	646	$0.00	10	1	18008177889-
(305) 555-8337	9527	1/5/96	1:55 PM	195	$0.00	10	1	18008888000-94192403437535813573
(305) 555-8337	9527	1/5/96	1:59 PM	202	$0.00	10	1	18008888000-94192403437535813251
(305) 555-8337	9527	1/5/96	2:08 PM	156	$0.25	4	2	7585533-
(305) 555-8337	9527	1/5/96	2:35 PM	247	$0.25	4	2	7949832-
(305) 555-8337	9527	1/5/96	3:00 PM	326	$0.00	10	1	18008177889-
(305) 555-8337	9527	1/5/96	3:20 PM	151	$0.00	10	1	18003927403-
(305) 555-8337	9527	1/5/96	3:27 PM	175	$0.25	4	2	3799401-
(305) 555-8337	9527	1/5/96	3:32 PM	29	$0.25	4	2	9252337-
(305) 555-8337	9527	1/5/96	3:35 PM	32	$0.25	4	2	7946312-
(305) 555-8337	9527	1/5/96	3:45 PM	160	$1.00	6	8	19417732155-
(305) 555-8337	9527	1/5/96	3:57 PM	51	$0.25	4	2	3793434-
(305) 555-8337	9527	1/5/96	4:29 PM	32	$0.25	4	2	7467248-
(305) 555-8337	9527	1/5/96	4:33 PM	93	$1.00	5	2	4922432-
(305) 555-8337	9527	1/5/96	4:40 PM	70	$0.25	4	2	7460262-

ANI Totals: (305) 555-8337   Lounge   26 calls   3260 $5.50

Call Type		Count	Duration	Price	Call Type		Count	Duartion	Price
4	Sent paid local calls	10	957	$2.50	5	Sent paid Intra LATA calls	1	93	$1.00
6	Sent paid InterLATA calls	1	160	$1.00	7	Sent paid InterState calls	1	14	$1.00
9	10-xxx 0+ 0- calls	1	128	$0.00	10	800-NXX-xxxx calls	11	1860	$0.00
41		1	48	$0.00					

15. SMDR Dial Around by Route

This report contains any or all SMDR (call records) that you have collected from your phones. It displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and Notes to be included.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. In addition, there are special variables that apply to the SMDR records to be chosen. You can set the range of any one or all of the following variables:

Call Date between **(earliest and latest dates)**	Selects ANIs for processing that were contacted between the dates entered.
Call Time between **(earliest and latest times)**	Selects ANIs for processing that were contacted between the times entered.
Dialing macro between [ ] and [ ]	Selects records using a macro number within the specified range.
Price between [$00.00] and [$00.00]	Selects records within the low and high call price amounts. Only calls priced within the entered range are processed.
Duration between [ ] and [ ]	Selects SMDR records within the low and high duration (expressed in seconds) for call time.
Destination between [ ] and [ ]	If specified, processes call records with destinations between the low and high values. Destination numbers can be up to 14 dialed digits in length. You can enter the full number of a destination, or you can enter only the first several digits. Entering the full destination number selects only records dialed to that number, while entering the first several digits allows selection of all destinations with a common prefix.
Call types include [*list of call types*]	Processes all SMDR records that contain one of the call types you select from the Select Call Types screen, which displays when you select the Call Types button.
Variables	Processes SMDR records with the site, phone, or group code variables you selected.

This report lets you see what type of traffic is originating from each one of your phones. You can use this report to find out what types of calls are being made, the time of day they are being made, and how much money you are making.

What makes this report special is that the digits dialed after the initial call is made are captured and printed. This lets you see the actual destination number of the call as well as the 10XXX, 950-XXXX, or 1-800-XXX-XXXX that was dialed first. This report can aid in securing dial around compensation from the various IXCs and OSPs that the end users have called.

If you print every call record (careful - it may be a very long report), you can see the date and time the call was placed, how long the call lasted, the amount deposited to make the call, the call type, and the macro the call used for routing purposes. The number that was dialed, along with subsequent digits, is the last column on the report.

If you print only totals, you will see a total for each type of call that was made (denoting the call type), how many calls, the total duration of the calls, and the total amount of money deposited for those calls.

You may also print this data to a file in comma-delimited ASCII format. This will enable you to use the data in outside programs for accounting or other purposes.

ANI	ID	Date	Technician	Code		Cost	Notes

<div align="center">

Cost Accounting Report by Route   *1/12/97*   *Page 1*

4:13 PM

10/1/96 through 1/10/97

</div>

ANI	ID	Date	Technician	Code		Cost	Notes

Route: Joe's Route

Site: Bob's Big Burger   4455 Burger Rd. Burgerville, PA 44556   Bob Burger

ANI	ID	Date	Technician	Code		Cost
(305) 555-9172	2569	12/27/96		6		($35.00)
(305) 555-9172	2569	12/27/96		101	OSP Revenue	($150.00)
(305) 555-9172	2569	12/27/96		200	LEC Bill	($45.00)
(305) 555-9172	2569	12/27/96		100	Coin Collection	$50.00
(305) 555-9172	2569	1/3/97		100	Coin Collection	$0.00

ANI Totals: (305) 555-9172   Bathroom   5 records   ($180.00)

Code		Count	Cost	Code		Count	Cost
6		1	($35.00)	100	Coin Collection	2	$50.00
101	OSP Revenue	1	($150.00)	200	LEC Bill	1	($45.00)

Site: Ana Coffee Shop   1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989   Ana Cesse

ANI	ID	Date	Technician	Code		Cost
(305) 555-8337	9527	10/15/96		200	LEC Bill	($97.10)
(305) 555-8337	9527	10/31/96	Jessica Tandy	101	OSP Revenue	$281.35
(305) 555-8337	9527	10/31/96		400	Site Commissions	($24.65)
(305) 555-8337	9527	10/31/96		100	Coin Collection	$121.75
(305) 555-8337	9527	11/15/96	Jessica Tandy	200	LEC Bill	($40.00)
(305) 555-8337	9527	11/30/96		400	Site Commissions	($38.15)
(305) 555-8337	9527	11/30/96		100	Coin Collection	$78.15
(305) 555-8337	9527	11/30/96		200	LEC Bill	($53.75)
(305) 555-8337	9527	11/30/96		101	OSP Revenue	$225.60
(305) 555-8337	9527	12/15/96		200	LEC Bill	($109.30)
(305) 555-8337	9527	12/31/96		400	Site Commissions	($29.85)
(305) 555-8337	9527	12/31/96		101	OSP Revenue	$296.50
(305) 555-8337	9527	12/31/96		100	Coin Collection	$139.15
(305) 555-8337	9527	1/3/97		100	Coin Collection	($100.00)

ANI Totals: (305) 555-8337   Lounge   14 records $649.70

16. Cost Accounting Report by Route

This report contains a listing of any or all income or expenses associated with a particular payphone. The report displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. In addition, specific controls for this report include the following, any one of which, if true, will cause the record to be selected for processing.

Date is between (earliest and latest dates)	Selects ANIs for processing that were contacted between the dates entered.
Cost is between (lowest and highest amounts)	Selects ANIs for processing that have an associated cost between the amounts entered.
Technician is between	Selects for processing any records indicating services performed by one or more technicians whose names fall between the low and high range of values (e.g., from *Smith, John* to *Walters, Fred*).
Accounting notes include [ ]	Selects for processing one or more records containing the phrase or set of letters or numbers in the accounting notes. Examples of using this might be to process all records with *Commission* or *LEC Bill* in the notes.
Codes [*list of codes*]	Indicates records using one of the selected accounting codes will be picked up for processing.
Variables	Processes SMDR records with the site, phone, or group code variables you selected.

This report, in conjunction with the cost accounting system, is a simple general ledger system. You can define specific accounting codes to be used for tracking income and expenses associated with each of your phones.

On a daily basis, you can keep a record of anything that has to do with a phone, whether it is installation costs, coin collections, repairs, phone bills, or commissions. At the end of the month or at the end of a compensation period, you can build a report showing all activity (plus and minus) that you have had with each phone. This lets you easily calculate your income as well as your commission payments.

You can choose whether each individual entry should be printed or only a summary by phone number. You can include or exclude any accounting codes that you choose. You can pick the date range of the entries, as well as the employee associated with each entry.

<table>
<tr><td colspan="6"><div align="center">**SMDR Summary by Category by Route** *2/7/96* *Page 1*</div><div align="right">*3:18 PM*</div><div align="center">**1/5/96 through 1/5/96**</div></td></tr>
</table>

ANI	ID	Call Type	Count	Duration in seconds	Price
Route:	Joe's Route				
Site:	Ana Coffee Shop	1702 S. 36 Street 2nd Floor S. Bernardo, FL 39989	Ana Cesse		
(305) 555-8337	9527				
	4	Sent paid local calls	30	3255	$7.50
	5	Sent paid IntraLATA calls	1	93	$1.00
	6	Sent paid InterLATA calls	4	575	$4.00
	7	Sent paid InterState calls	1	14	$1.00
	9	10-xxx 0+ & 0- calls	1	128	$0.00
	10	800-NXX-xxxx calls	18	3936	$0.00
	36	0- calls	4	259	$0.00
	41		2	69	$0.00
	42		2	79	$0.00
	43		1	60	$0.00
ANI Totals:	(305) 555-8337		64	8468	$13.50
(305) 555-9722	1809				
	3	Information	2	150	$0.00
	4	Sent paid local calls	46	3544	$11.50
	9	10-xxx 0+ & 0- calls	4	556	$0.00
	10	800-NXX-xxxx calls	31	5503	$0.00
	36	0- calls	1	88	$0.00
	40	0+ No credit card - local	3	484	$0.00
	41		2	160	$0.00
	42		3	357	$0.00
	41		2	69	$0.00
	42		2	79	$0.00
ANI Totals:	(305) 555-9722		92	10842	$11.50
(305) 555-9998	5488				
	4	Sent paid local calls	45	5542	$11.25
	5	Sent paid IntraLATA calls	3	250	$3.00
	7	Sent paid InterState calls	2	342	$3.00
	9	10-xxx 0+ & 0- calls	2	95	$0.00
	10	800-NXX-xxxx calls	27	3623	$0.00
	24	Service Desk calls	1	51	$0.00
	36	0- calls	2	55	$0.00
	41		3	162	$0.00
	42		1	69	$0.00
ANI Totals:	(305) 555-9998		86	10189	$17.25
Site Totals:	Ana Coffee Shop	3 ANI's	242	29499	$42.25

Call Type	Count	Duration	Price	Call Type	Count	Duration	Price
3 Information	2	150	$0.00	4 Sent paid local calls	121	12341	$30.25
5 Sent paid IntraLATA calls	4	343	$4.00	6 Sent paid InterLATA calls	4	575	$4.00
7 Sent paid InterState calls	3	356	$4.00	9 10-xxx 0+ 0- calls	7	779	$0.00
10 800-NXX-xxxx calls	76	13062	$0.00	24 Service Desk calls	1	51	$0.00
36 0- calls	7	402	$0.00	40 0+ No credit card - local	3	484	$0.00
41	7	391	$0.00	42	6	505	$0.00
43	1	60	$0.00				

SMDR Summary by Category by Route (RPT20)

17. SMDR Summary by Category by Route

This report contains totals of the SMDR (call records) that you have collected from your phones. This report displays records in order by route, then by site, then by ANI. This report also enables you to select records based on a large number of selection criteria, including the date range of the calls, the ANI, Site, Route, Grand Totals, Call Types, and Variables.

This report enables you to see what type of traffic is originating from each of your phones.   You can use this report to find out what types of calls are being made and how much money you are making.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Selection criteria specific to this report include the following:

Call Date between [   ] and [   ]   Selects ANIs that have a contract date between two specified dates.

Call Time between [   ] and [   ]   Selects ANIs that have a contract time between two specified times.

Dialing macro between [ ] and [ ]   Selects records using a macro number within the specified range.

Price between [$00.00] and [$00.00]   Selects records using the low and high call price amounts. Only calls priced within the entered range will be processed.

Duration between [   ] and [   ]   Selects SMDR records within the low and high duration (expressed in seconds by default) for call time. Duration can be displayed in minutes and tenths.

Destination between [ ] and [   ]   Selects call records with destinations between the low and high values.   Destination numbers may be up to 14 dialed digits in length.

Call types include [*list of call types*]   Selects SMDR records that contain one of the selected call types.

When you print the report, you will see a total for each category of call that was made, denoting the call type, how many calls, the total duration of the calls, and the total amount of money deposited for those calls.

ANI	ID		Reg. & Opt.	Rates	Pri. Parsing	Speed Dial	Program	Voice Br
			Date since phone required download					
Route: Joe's Route								
Site: Bob's Big Burger		4455 Burger Rd. Burgerville, PA 44556				Bob Burger		
(305) 555-9172	2569	Bathroom	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
(904) 555-9808	2527	Bus Stop	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
(904) 555-9816	2527	Outside	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
(999) 999-9999	9999	dummy fon	04/15/96 13:56			11/07/95 06:44		
Site Totals: 4 ANI's		**# Out-of-Date**:	4	3	3	4	3	3
Site: Ana Coffee Shop		1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989				Ana Cesse		
(305) 555-8337	9527	Lounge	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
(305) 555-9722	1809	Booth	10/16/95 08:56	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
(305) 555-9998	5488	Inside	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
Site Totals: 3 ANI's		**# Out-of-Date**:	3	3	3	3	3	3
Site: Ana Fashions		Waterfall Mall Miami, FL 33980				Ana Smith		
(305) 555-9543	1166	outside Pe	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
Site: Aquino Laundry		5th street Route 1 S.Miami, FL 39980				Ray Aquino		
(407) 555-9172	1233	Bathroom	07/21/95 10:06	10/17/95 07:37	07/21/95 10:06	10/17/95 07:37	07/21/95 10:06	07/21/95
Site: El Barrilito		Calle 8, 3rd Ave. Miami, FL 33980				Juan Valdez		
(305) 555-9406	9909	outside Pe	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
Site: El Dorado		Dorado Avenue Sarasota, FL 59980				Dorado Corp.		
(305) 555-9714	4444	Jewelers 2	04/24/96 12:18	10/17/95 07:37	07/23/95 15:52	10/17/95 07:37	07/23/95 15:52	07/23/95
Site: Luis Mobil		Corner of Ash and Oak Street Miami, FL 33908				Luis Hernandez		
(305) 555-9071	9237	Gas Tank	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	10/17/95 07:37	07/21/95 09:59	07/21/95
Route Totals: 12 ANI's		**# Out-of-Date:**	12	11	11	12	11	11

18. Operational Files Exceptions

This report can be run at any time to alert you to the payphones that have had changes made to their operational files in the database but that have not yet been downloaded to the payphone.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Operational files include one or more of the following: speed dial, priority parsing, program file, voice brand file, or registers and options changes. The report is sorted by route, then by site, then by ANI, and can be limited within a user entered date range.

Phone Master Report by Map Code

10/3/96   *Page 1*
10:49 AM

ANI	ID	Location	Last Call	Keys		Serial #	Group	Notes
Route: Joe's Route								
Map Code:			**Site:**	Bob's Big Burger				
(305) 555-9172	2569	Bathroom	9/27/96	0000000000	0000000000			
(904) 555-9808	2527	Bus Stop	9/16/96	0000000000	0000000000			
(904) 555-9816	2527	Outside	9/27/96	0000000000	0000000000			
(999) 999-9999	9999	dummy fon		0000000000	0000000000	999999999		
Map Code Total:	4 ANI's							

**Section A
Normal Version**

Phone Master Report by Map Code

10/3/96   *Page 1*
11:16 AM

ANI	ID	Location	Last Call	Keys		Serial #	Group	Notes
Route: Joe's Route								
Map Code:			**Site:**	Bob's Big Burger				
(305) 555-9172	2569	Bathroom	9/27/96	0000000000	0000000000			
(904) 555-9808	2527	Bus Stop	9/16/96	0000000000	0000000000			
(904) 555-9816	2527	Outside	9/27/96	0000000000	0000000000			
(999) 999-9999	9999	dummy fon		0000000000	0000000000	999999999		

**Section B
Compressed
Version**

(407) 555-9879	2/21/96	Rte: Joe's	Key: 0000000000	(305) 555-8152	2/21/96	Rte: Joe's	Key: 0000000000
Miami Clutch & Brakes		right side		The Bootery Whse		outside Pe	
333 Main Street		ID 9879		1702 S. 36 Street		ID 9297	
		MAP:					

**Section C
Labels Version**

(305) 555-9722	2/21/96	Rte: Joe's	Key: 0000000000	(305) 555-9998	2/21/96	Rte: Joe's	Key: 0000000000
Ana Coffee Shop		Booth		Ana Coffee Shop		Inside	
1702 S. 36 Street		ID 1809		1702 S. 36 Street		ID 5488	
2nd Floor		MAP:		2nd Floor		MAP:	

19. Phone Master Report by Map Code

This report contains a listing of basic data from your database and can be printed in three different formats, ordered by route, then by site, then by ANI. You can control the range of records contained in the report by defining the map codes, routes, sites, ANIs, notes, and the most recent cashbox amount. This is not an accounting type report since it does not include any cashbox or totalizer information.

You can control this report by using the selection criteria discussed in sSection 3.3.2, *Controlling Report Contents*. Controls that are specific to the Phone Master by Map Code screen include the following:

Cashbox amount over a specified amount

You can specify the phones to be selected for processing by indicating a minimum cashbox amount at the last contact to be processed.

The default format is referred to as the Normal version. As you can see by looking at section A, this version contains ANIs organized by map code for a specific site. Every ANI located at that site is then printed, showing the most recent contact date with the ANI, the keys for the cashbox and upper housing, the serial number, the type of installation, and any notes that have been entered into the database record.

The second version, called the Compressed version, contains the same information as the Long version. The major difference is that there are no titles and no blank lines between routes and sites. While this layout might be tougher to read, you can print three times as many phones on a page. This layout is depicted in section B.

The third version, referred to as **Labels**, contains information about each ANI on a 1" by 4" label, either in a one-up or a two-up format. The two-up format is depicted in section C.

You can use labels for file folders or to aid in cashbox accounting. With the capability to print the labels on a route by route basis and only if the cashbox amount is over a certain threshold, you can print the labels, pull the keys that are depicted on the labels, and send your collector on his way.

Once at the site, the collector can place the label on an empty cashbox, remove the old cashbox, and install the new cashbox. The old cashbox is then forwarded to the accounting group. By looking at the label, the accounting group can see where the box came from and when it was originally installed.

If desired, the barcoded ANI can be read into a coin counting machine, the box dumped and counted, and the resulting figures entered into the cost accounting function. A report that compares the actual coin count to the amount reported by the phone can then be run, and any discrepancies can be noted and addressed.

<div align="center">

Destination #'s by Route

</div>

				Destination #'s by Route			*1/7/96*	*Page 1*
				1/5/95 through 1/5/96			*3:18 PM*	

ANI	ID	Date	Time	Duration in seconds	Price	Call Type	Macro	Destination - Dial Around
Route:	Joe's Route							
Site:	Ana Coffee Shop			1702 S. 36 Street 2nd Floor S. Bernardo, FL 39989				Ana Cesse
(305) 555-8337	9527	1/5/96	12:08 PM	84	$0.00	13	6	9501022-08132654653813931002
(305) 555-8337	9527	12/19/95	3:12 PM	46	$0.00	10	1	18006747000-81336065589790813866
(305) 555-8337	9527	11/14/95	11:38 AM	134	$0.00	13	6	9501022-08134653
(305) 555-8337	9527	9/1/95	1:56 PM	118	$0.00	10	1	18006747000-81377823127608881377
(305) 555-8337	9527	7/4/95	9:15 AM	278	$0.00	13	6	9501022-08134653
(305) 555-8337	9527	5/8/95	10:03 AM	45	$0.00	13	6	9501022-08132654653813931002
(305) 555-8337	9527	4/20/95	7:06 PM	121	$0.00	10	1	18006747000-81377823127608881377
(305) 555-8337	9527	3/17/95	8:18 PM	472	$0.00	10	1	18006747000-81336065589790813866
(305) 555-8337	9527	1/25/95	2:40 PM	12	$0.00	13	6	9501022-08132654653813931002
ANI Totals:	(305) 555-8337	Lounge	9 calls	1310	$0.00			
Site:	El Dorado			Dorado Avenue Sarasota, FL 59980				Dorado Corp.
(813) 555-9714	4444	11/16/95	10:07 AM	28	$0.00	13	6	9501022-08132654653813931002
(813) 555-9714	4444	10/27/95	10:09 AM	26	$0.00	13	6	9501022-08132654653813931002
(813) 555-9714	4444	10/22/95	10:10 AM	18	$0.00	13	6	9501022-08134653
(813) 555-9714	4444	9/20/95	10:11 AM	271	$0.00	10	1	18009501111-00061479255506147924
(813) 555-9714	4444	9/12/95	4:47 PM	109	$0.00	13	6	9501022-08132654653813931002
(813) 555-9714	4444	9/3/95	4:49 PM	41	$0.00	13	6	9501022-08138786808813931002
(813) 555-9714	4444	8/17/95	4:52 PM	303	$0.00	13	6	9501022-08132872555813931002
(813) 555-9714	4444	8/4/95	12:18 PM	22	$0.00	10	1	18006747000-81377823127608813778
(813) 555-9714	4444	7/26/95	12:19 PM	28	$0.00	10	1	18006747000-81377823127608813778
(813) 555-9714	4444	7/21/95	12:37 PM	16	$0.00	10	1	18006747000-81377823127608813778
(813) 555-9714	4444	7/14/95	12:44 PM	105	$0.00	10	1	18006747000-81377823127608881377
(813) 555-9714	4444	7/10/95	8:00 PM	67	$0.00	13	6	9501022-81335125552123621221
(813) 555-9714	4444	6/11/95	7:57 PM	24	$0.00	10	1	18006747000-81336065589790813866
(813) 555-9714	4444	6/10/95	7:58 PM	743	$0.00	10	1	18006747000-81336065589790813866
(813) 555-9714	4444	6/7/95	9:00 PM	367	$0.00	10	1	18002655328-4073812724-
ANI Totals:	(305) 555-8337	Lounge	15 calls	2168	$0.00			
Site:	Luis Mobil			Corner of Ash and Oak Street Miami, FL 33908				Luis Hernandez
(305) 555-9071	9237	12/5/95	2:16 PM	36	$0.00	10	1	18006747000-81336065589790813866
(305) 555-9071	9237	10/25/95	4:15 PM	183	$0.00	10	1	18002655328-4073812724-
(305) 555-9071	9237	9/1/95	12:26 PM	18	$0.00	13	6	9501022-08138786808813931002
(305) 555-9071	9237	8/30/95	10:08 AM	272	$0.00	10	1	18002655328-4073812724-
(305) 555-9071	9237	5/5/95	2:16 PM	96	$0.00	13	6	9501022-08138786808813931002
(305) 555-9071	9237	4/25/95	4:15 PM	43	$0.00	10	1	18006747000-81336065589790813866
(305) 555-9071	9237	4/1/95	12:26 PM	178	$0.00	13	6	9501022-08138786808813931002
(305) 555-9071	9237	1/13/95	10:08 AM	22	$0.00	10	1	18006747000-81336065589790813866
ANI Totals:	(305) 555-8337	Lounge	8 calls	848	$0.00			
Route Totals:	Joe's Route		32 calls	4326	$0.00		3 ANI's	

Call Type		Count	Duration	Price	Call Type			Count	Duration	Price
10	800 NXX-XXXX calls	17	2889	$0.00	13	950-XXXX calls		15	1437	$0.00

20. Destination #'s by Route

This program enables you to print or view any SMDR (call records) that you have collected from your phones where the destination numbers match any of a list of numbers that you create and maintain. This report prints in order by route, then by site, then by ANI. Similar to all of the other reports, this program allows you to select records based upon a large number of selection criteria. This includes the date range of the calls, the time range of the calls, route, site, ANI, specific dialing macro, call price range, call duration range, and specific call types. In addition to selecting which records will print, you can also specify what detail should print, and whether or not to skip to a new page after certain totals are printed.

This report is very useful to track dial around calls to a specific carrier. MCI for example, has over 10 different numbers that users can dial to reach them. For example:

> 10111
> 10222
> 10888
> 9501022
> 9501088
> 9501111
> 18002655328
> 18004449595
> 18006747000
> 18009501022

What makes this report special is that the digits dialed after the initial call is made are captured and printed. This enables you to see the actual destination number of the call as well as the 10XXX, 950-XXXX, or 1-800-XXX-XXXX that was dialed first. This report should aid in securing dial around compensation from the various IXC's and OSP's that the end users have called.

If you choose to print each and every call record, you can see the date and time that the call was placed, how long the call lasted (in seconds, rounded up to the next minute, or rounded up to the next tenth of minute), the amount deposited to make the call, the call type, and the macro that the call used for routing purposes. The number that was dialed, along with the subsequent digits, is the last column on the report.

If you choose to print only totals, you will see a total for each type of call that was made, denoting the call type, how many calls, the total duration of the calls, and the total amount of money deposited for those calls.

ANI	ID	Date	Time	Duration in seconds	Price	Call Type	Macro	Destination - Dial Around

SMDR Summary by Hour   *3/06/97*   *Page 1*
6/24/96 through 6/25/96   *5:03 PM*

Route: Joe's Route

Site: Ana Coffee Shop   1702 S. 36 Street 2nd Floor S. Bernardo, FL 39989   Ana Cesse

ANI	ID	Date	Time	Duration in seconds	Price	Call Type	Macro	Destination - Dial Around
(305) 555-8337	9527	6/24/96	8:08 AM	84	$0.00	13	6	9501022-08132654653813931002
(305) 555-8337	9527	6/24/96	8:12 AM	46	$0.00	10	1	18006747000-81336065589790813866
(305) 555-8337	9527	6/24/96	8:38 AM	134	$0.00	13	6	9501022-08134653
(305) 555-8337	9527	6/24/96	8:56 AM	118	$0.00	10	1	18006747000-81377823127608881377
(305) 555-8337	9527	6/24/96	9:15 AM	278	$0.00	13	6	9501022-08134653
(305) 555-8337	9527	6/24/96	10:03 AM	45	$0.00	13	6	9501022-08132654653813931002
(305) 555-8337	9527	6/24/96	2:06 PM	121	$0.00	10	1	18006747000-81377823127608881377
(305) 555-8337	9527	6/24/96	2:18 PM	472	$0.00	10	1	18006747000-81336065589790813866
(305) 555-8337	9527	6/24/96	2:40 PM	12	$0.00	13	6	9501022-08132654653813931002
(305) 555-8337	9527	6/24/96	2:08 PM	156	$0.25	4	2	7585533-
(305) 555-8337	9527	6/24/96	2:35 PM	247	$0.25	4	2	7949832-
(305) 555-8337	9527	6/24/96	3:00 PM	326	$0.00	10	1	18008177889-
(305) 555-8337	9527	6/24/96	3:20 PM	151	$0.00	10	1	18003927403-
(305) 555-8337	9527	6/24/96	3:27 PM	175	$0.25	4	2	3799401-
(305) 555-8337	9527	6/24/96	3:32 PM	29	$0.25	4	2	9252337-
(305) 555-8337	9527	6/24/96	3:35 PM	32	$0.25	4	2	7946312-
(305) 555-8337	9527	6/24/96	3:45 PM	160	$1.00	6	8	19417732155-
(305) 555-8337	9527	6/24/96	3:57 PM	51	$0.25	4	2	3793434-
(305) 555-8337	9527	6/24/96	4:29 PM	32	$0.25	4	2	7467248-
(305) 555-8337	9527	6/24/96	4:33 PM	93	$1.00	5	2	4922432-
(305) 555-8337	9527	6/24/96	4:40 PM	70	$0.25	4	2	7460262-

ANI Totals: (305) 555-8337   Lounge   21 calls   2832 $4.00

Day	Hour	Duration	Price	Day	Hour	Duration	Price
6/24/96	8	382	$0.00	6/24/96	9	278	$0.00
6/24/96	10	45	$0.00	6/24/96	14	1008	$0.50
6/24/96	15	924	$2.00	6/24/96	16	195	$1.50

21. SMDR Summary by Hour by Route

This program enables you to print or view a summary of any or all SMDR (call records) that you have collected from your phones. This report prints in order by route, then by site, then by ANI. Similar to all of the other reports, this program allows you to select records based upon a large number of selection criteria. This includes the date range of the calls, the time range of the calls, route, site, ANI, specific dialing macro, call price range, call duration range, specific destination numbers, and specific call types. In addition to selecting which records will print, you can also specify what detail should print, and whether or not to skip to a new page after certain totals are printed.

Call Date between (earliest and latest dates)	Selects ANIs for processing that were contacted between the dates entered.
Call Time between (earliest and latest times)	Selects ANIs for processing that were contacted between the times entered.
Dialing macro between [ ] and [ ]	Selects records using a macro number within the specified range.
Price between [$00.00] and [$00.00]	Selects records within the low and high call price amounts. Only calls priced within the entered range are processed.
Duration between [ ] and [ ]	Selects SMDR records within the low and high duration (expressed in seconds) for call time.
Destination between [ ] and [ ]	If specified, processes call records with destinations between the low and high values. Destination numbers can be up to 14 dialed digits in length. You can enter the full number of a destination, or you can enter only the first several digits. Entering the full destination number selects only records dialed to that number, while entering the first several digits allows selection of all destinations with a common prefix.
Call types include [*list of call types*]	Processes all SMDR records that contain one of the call types you select from the Select Call Types screen, which displays when you select the Call Types button.
Variables	Processes SMDR records with the site, phone, or group code variables you selected.

This report allows you to see the day of the week and the hour of the day that traffic is originating from each one your phones. You can use this report to find out if your phones have certain busy hours and/or days, and possibly make adjustments in the number of phones at a particular location. If you are buying transmission from your IXC at discounted off hour rates, this is a good report to spot check your phone bill. In addition to the summary, you also have the capability to print each and every call record. If you do, you can see the date and time that the call was placed, the number that was dialed, how long the call lasted (in seconds, rounded up to the next minute, or rounded up to the next tenth of minute), the amount deposited to make the call, the call type, and the macro that the call used for routing purposes. You can also see diagnostic flags to help our customer service group troubleshoot any operational problems that you may be having.

Contact Report by Customer
7/05/96 through 7/05/96

3/06/95 *Page 1*
14:14:54

Customer 1   Payphone Partnership

Section "A"

ANI	I.D.		Date	Time	Box Current	Box @ Collect	Box Totalizer	Alarms	LCoin OCoin	Zero+ Zero-	Around Other	
Site:	**23 Big Dave's Bar & Grill**			**1147 U.S. 41 South Bradenton, Fl 34432**					**Fred Sillin**			
813-555-8191	8191	left phone	7/05/96	3:59:54	46.85	0.00	392.00	....	164	3	5	3	20	6
813-555-8192	8192	right phone	7/05/96	4:01:03	33.00	0.00	33.75	....	132	0	2	1	12	10
Totals for SITE	23 Big Dave's Bar & Grill											
					79.85		425.75		296		7		32	
		2 ANI's				0.00				3		4		16
Site:	**25 University Park Country Club**			**2261 First Blvd. Sarasota Park, Fl 34201**					**Barbara Bilman**			
813-555-4859	4859	Near restroom	7/05/96	3:45:00	20.30	0.00	20.30	....	73	1	21	4	49	6
Totals for Customer 1	**Payphone Partnership**											
					100.15		446.05		369		28		81	
		3 ANI's				0.00				4		8		22

Contact Report by Customer
7/05/96 through 7/05/96

3/06/95 *Page 1*
14:14:54

Customer 1   Payphone Partnership

Section "B"

ANI	I.D.		Date	Time	Box Current	Box @ Collect	Box Totalizer	Alarms	LCoin OCoin	Zero+ Zero-	Around Other	
Site:	**23 Big Dave's Bar & Grill**			**1147 U.S. 41 South Bradenton, Fl 34432**					**Fred Sillin**			
813-555-8191	8191	left phone	6/15/96	3:45:00	33.35	0.00	310.75	....	126	1	4	2	22	6
813-555-8191	8191	left phone	6/16/96	3:45:00	35.35	0.00	312.75	....	134	1	6	2	23	6
813-555-8191	8191	left phone	6/17/96	3:45:00	38.10	0.00	315.50	....	145	1	6	2	25	6
813-555-8191	8191	left phone	6/18/96	3:45:00	47.15	0.00	324.55	....	168	2	6	2	28	8
813-555-8191	8191	left phone	6/19/96	3:45:00	51.45	0.00	328.85	....	185	2	7	3	28	8
813-555-8191	8191	left phone	6/20/96	3:45:00	54.20	0.00	331.60	....	196	2	9	3	29	10
813-555-8191	8191	left phone	6/21/96	4:00:29	59.50	0.00	336.90	....	217	2	9	3	31	11
813-555-8191	8191	left phone	6/22/96	3:45:00	60.50	0.00	337.90	....	221	2	9	3	55	11
813-555-8191	8191	left phone	6/23/96	3:45:00	67.50	0.00	344.90	....	249	2	9	4	58	11
813-555-8191	8191	left phone	6/24/96	3:45:00	1.75	0.00	346.90	M......	7	0	0	2	1	1
813-555-8191	8191	left phone	6/25/96	3:45:00	6.75	0.00	351.90	M......	27	0	0	2	3	1
813-555-8191	8191	left phone	6/26/96	3:45:00	8.25	0.00	353.40	....	33	0	0	2	5	1
813-555-8191	8191	left phone	6/27/96	3:45:00	11.00	0.00	356.15	....	44	0	2	2	5	1
813-555-8191	8191	left phone	6/28/96	3:45:00	13.00	0.00	358.15	....	52	0	2	2	7	3
813-555-8191	8191	left phone	6/29/96	3:45:00	18.50	0.00	363.65	....	74	0	2	2	8	4
813-555-8191	8191	left phone	6/30/96	4:02:40	24.75	0.00	369.90	....	99	0	4	2	10	4
813-555-8191	8191	left phone	7/01/96	4:02:12	30.00	0.00	375.15	Alarms	120	0	5	3	12	5
813-555-8191	8191	left phone	7/02/96	4:04:16	35.75	0.00	380.90	....	132	1	5	3	14	5
813-555-8191	8191	left phone	7/03/96	4:01:26	39.75	0.00	384.90	....	148	1	5	3	16	6
813-555-8191	8191	left phone	7/04/96	4:00:15	4.85	0.00	390.00	....	156	3	5	3	16	6
813-555-8191	8191	left phone	7/05/96	3:59:54	46.85	0.00	392.00	....	164	3	5	3	20	6
Totals for Customer 1	**Payphone Partnership**											
					728.30		7,366.70		2697		100		416	
		1 ANI's				0.00				23		53		120

22. Contact Report by Customer

This program enables you to print or view any or all contacts that you have had with any or all of your phones. This report prints in order by customer, then by site, then by ANI. Similar to all of the other reports, this program allows you to select records based upon a large number of selection criteria. This includes the date range of the contacts, the time range of the contacts, customer, site, ANI, specific alarm codes, cashbox range, coin collection amount range, and notes. In addition to selecting which records will print, you can also specify what detail should print, and whether or not to skip to a new page after certain totals are printed.

Contact Date between (earliest and latest dates)	Selects ANIs for processing that were contacted between the dates entered.
Contact Time between (earliest and latest times)	Selects ANIs for processing that were contacted between the times entered.
Select Alarms	Selects ANIs for processing with alarm conditions you select.
Cashbox amount between [$000.00] and [$000.00]	Selects ANIs for processing where the amount reported in the cashbox by the phone falls between the dollar amounts entered.
Cashbox at collect between [$000.00] and [$000.00]	Selects ANIs for processing where the cashbox amount at last collection was between the dollar amounts entered.
Variables	Selects ANIs that have the user defined phone, site, or group code variables.

This is an excellent report to see the status of all of your phones on a given date, as depicted in section "A". Sequenced by customer, then by site, then by ANI, each site name will print, followed by the contacts for each ANI located at that particular site. Information printed includes the ANI, I.D., date of contact, time of contact, current cashbox amount, amount collected at that contact, the totalizer, all alarms, and a summary of the call counters depicting local coin calls, other coin calls (long distance), 0+ calls, 0- calls, dial around (1-800, 10XXX, and 950-XXXX) calls, and finally all other classifications of calls.

A second use for this particular report, depicted in section "B", is to see all of the contacts with a particular ANI over a requested date range. In this manner, you can see each and every contact that you have had with a phone, and possibly spot trouble areas, or see when a phone was collected, or if a certain alarm seems to be occurring frequently.

By specifying certain alarms or dollar amounts, you can easily get a report showing you vital information. For example, by specifying cashbox amounts over $150, you can have a list of phones that should probably be emptied. Specifying alarm code "C" will print a list of all phones that were just collected. Similarly, specifying records where the cashbox at collect was greater than $.01 you can also get a list of phones recently collected.

<table>
<tr><td colspan="6"><center>**Cost Accounting by Customer**</center></td><td>*3/06/95*</td><td>*Page 1*</td></tr>
<tr><td colspan="6"><center>**6/01/96 through 6/30/96**</center></td><td>*14:53:18*</td><td></td></tr>
</table>

ANI	I.D.	Date	Employee	Code	Cost	Notes	

Route: **Joe's Route**

Site: **Big Dave's Bar & Grill** 1147 U.S. 41 South Bradenton, Fl 34432 **Fred Sillin**

ANI	I.D.	Date	Employee	Code	Cost	Notes	
813-555-8191	8191	6/02/96	Joe Jackson		5	Info Cards	($150.00)
813-555-8191	8191	6/12/96	Joe Jackson		0	Unassigned Account	($0.25)
813-555-8191	8191	6/15/96	Joe Jackson		7	Volume Control Button	($0.25)
813-555-8191	8191	6/30/96	Joe Jackson		4	Keypad	($75.00)

ANI Totals: **813-555-8191** **left phone** Totals: **4 Records** **($225.50)**

Code		Count	Cost	Code		Count	Cost
0	Unassigned Account	1	($0.25)	4	Keypad	1	($75.00)
5	Info Cards	1	($150.00)	7	Volume Control Button	1	($0.25)

ANI	I.D.	Date	Employee	Code	Cost	Notes	
813-555-8192	8192	6/25/96	Joe Jackson		0	Unassigned Account	($0.25)
813-555-8192	8192	6/30/96	Joe Jackson		6	Board	($495.00)

ANI Totals: **813-921-8192** **right phone** Totals: **2 Records** **($495.25)**

Code		Count	Cost	Code		Count	Cost
0	Unassigned Account	1	($0.25)	6	Board	1	($495.00)

Totals for SITE: **Big Dave's Bar & Grill** **2ANI'S** **6 Records** **($720.75)**

Code		Count	Cost	Code		Count	Cost
0	Unassigned Account	2	($0.50)	4	Keypad	1	($75.00)
5	Info Cards	1	($150.00)	6	Board	1	($495.00)
7	Volume Control Button	1	($0.25)				

Site: **Ana Coffee Shop** 1702 S. 36 Street 2nd Floor S. Bernardo, FL 39989 **Ana Cesse**

ANI	I.D.	Date	Employee	Code		Cost	Notes
813-555-1917	1917	6/27/96	Joe Jackson	2	Battery	($15.00)	
813-555-1917	1917	6/30/96	Joe Jackson	4	Keypad	($75.00)	

ANI Totals: **813-555-1917** **Lobby** Totals: **2 Records** **($90.00)**

Code		Count	Cost	Code		Count	Cost
2	Battery	1	($15.00)	4	Keypad	1	($75.00)

Totals for Route: **Joe's Route** **2 Sites** **3 ANI's** **8 Records** **($810.75)**

Code		Count	Cost	Code		Count	Cost
0	Unassigned Account	2	($0.50)	2	Battery	1	($15.00)
4	Keypad	2	($150.00)	5	Info Cards	1	($150.00)
6	Board	1	($495.00)	7	Volume Control Button	1	($0.25)

23. Cost Accounting by Customer

This program enables you to print or view any or all income or expenses associated with a particular phone. This report prints in order by customer, then by site, then by ANI. Similar to all of the other reports, this program allows you to select records based upon a large number of selection criteria. This includes the date range of the entries, customer, site, ANI, specific cost codes, cost range, employee, and notes. In addition to selecting which records will print, you can also specify what detail should print, and whether or not to skip to a new page after certain totals are printed.

Date is between (earliest and latest dates)   Selects ANIs for processing that were contacted between the dates entered.

Cost is between(lowest and highest amounts) Selects ANIs for processing that have an associated cost between the amounts entered.

Technician is between   Selects for processing any records indicating services performed by one or more technicians whose names fall between the low and high range of values (e.g., from *Smith, John* to *Walters, Fred*).

Accounting notes include [   ]   Selects for processing one or more records containing the phrase or set of letters or numbers in the accounting notes. Examples of using this might be to process all records with *Commission* or *LEC Bill* in the notes.

Codes [*list of codes*]   Indicates records using one of the selected accounting codes will be picked up for processing.

Variables   Processes SMDR records with the site, phone, or group code variables you selected.

This report, in conjunction with the cost accounting system, is actually a simple general ledger system. You can define specific accounting codes to be used for tracking income and expenses associated with each of your phones. On a daily basis you can keep a record of anything that has to do with a phone, whether it is installation costs, coin collections, repairs, phone bills, commissions, etc. At the end of the month, or the end of a commission cycle, you can print a report showing all activity (plus and minus) that you have had with each phone, in order to easily calculate your income, as well as commission payments.

You can choose whether each individual entry should be printed, or only a summary by phone number. You can include or exclude any accounting codes that you choose to. You can pick the date range of the entries, as well as the employee associated with each entry. This is a very flexible system that a number of customers utilize in order to run their businesses.

Create / Post Coin Accruals

3/06/97 *Page 1*

6/01/96 vs. 7/01/96 30 Days *15:35:06*

posted to code 10 on 6/30/96

ANI	I.D.		Amount 1	Amount 2	Difference	Daily Average
Route:	10001 Elcotel Communications Svcs					
Site:	**Big Dave's Bar & Grill**	**1147 U.S. 41 South Bradenton, Fl 34432**			**Fred Sillin**	
813-555-8191	8191	left phone	261.65	375.15	113.50	3.78
813-555-8192	8192	right phone	220.10	421.25	201.15	6.71
Site Totals:		2 ANI's	481.75	796.40	314.65	10.49
Site:	**University Park Country Club**	**2261 First Blvd. Sarasota Park, Fl 34201**			**Barbara Bilman**	
813-555-4859	4859	Near restroom	386.45	18.05	368.40-	12.28-
Site:	**Primo's! Italian Ristorante**	**2226 S. Tamiami Trail Sarasota, FL 34243**			**Morty Lewis**	
813-555-4876	4876	Lobby	121.50	166.10	44.60	1.49
Site:	**Pesos Steak Cantina**	**7789 N. Tamiami Trail Nokomis, FL 34243**			**Danny Ming**	
813-555-4877	4877	Lobby	68.80	105.15	36.35	1.21
Site:	**Colony Cove - Harmony Hall**	**3315 Lakeshore Drive Palmetto, Fl 34222**			**Fred Snyder**	
813-555-4399	4399	back by pool	2.25	13.95	11.70	0.39
Site:	**Colony Cove - Manatee Hall**	**235 Harbor Circle Eustis, Fl 34222**			**Fred Snyder**	
813-555-4392	4392	front entrance	7.00	14.00	7.00	0.23
Site:	**Bingorama**	**1987 12th Street East Bradenton, Fl 34203**			**Steve Norris**	
813-555-9538	9538	Back Wall	378.30	453.10	74.80	2.49
Site:	**E-Z Check Cashing**	**3333 6th Street East Bradenton, Fl 34205**			**Mary Davis**	
813-555-9053	9053	inside	226.00	336.05	110.05	3.67
Site:	**Sarasota Housing Authority**	**5567 Dallas Avenue Sarasota, Fl**			**Bob Jones**	
813-555-7013	7013	outside	0.00	119.05	0.00	0.00
Site:	**Sarasota Housing Authority**	**7667 Beth Ave. Sarasota, Fl**			**Bob Jones**	
813-555-7014	7014	outside	0.00	65.05	0.00	0.00
Site:	**Just for Boys**	**24357 14th Street West Sarasota, Fl**			**Sam Elliot**	
813-555-9809	9809	by soda machine	0.00	27.25	0.00	0.00
Site:	**Babe Ruth Little League Field**	**Behind Boys Club Bradenton, Fl**			**Bobby Bonilla**	
813-555-2454	2454	3rd base	0.00	574.80	0.00	0.00
Site:	**Fisherman's Landing**	**3345 Braden River Road Ft. Myers, Fl 34203**			**Sam Flounder**	
813-555-9562	9562	outside	0.00	10.80	0.00	0.00
Site:	**Salvation Army**	**11228 147th Street Sarasota, Fl 34234**			**Ellen Smith**	
813-555-7020	7020	outside entrance	0.00	1.00	0.00	0.00
Route Totals:		**15 ANI's**	**1,672.05**	**2,700.75**	**1,028.70**	**34.29**

24. Create/Post Coin Accruals

This report is very similar to **Totalizer Delta Selections by Route**, in that it allows you to print a listing of phones that shows you the change in totalizer amounts for a selected date range. This report prints in order by route, then by site, then by ANI. Similar to all of the other reports, this program allows you to choose a range of records to be printed, with selection criteria based upon the Route, Site, ANI, Dates, and Notes.

Earliest date	Selects ANIs after the specified date. Any contact preceding this date is skipped.
Latest date	Selects ANIs on the specified date. Any contact not on this date is skipped.
Lowest amount	Selects ANIs with more than the specified dollar amount. Any phone with a totalizer change lower than this amount is skipped.
Highest amount	Selects ANIs with less than the specified dollar amount. Any phone with a totalizer change higher than this amount is skipped.
Variables	Selects ANIs with the phone, site, and group code variables you want included in this report.
Post to the Acct Code	This generates the Accounting Journal entries for the data selected by this report. You should verify the data by viewing the report prior to clicking on this button.

The difference is, this program prompts you for a cost accounting code and a date to post the calculated difference to. In this manner, you can automatically create cost accounting entries for your coin collections. **You should not attempt to use actual coin collection figures when calculating commissions**. Even if you believe that you are small enough to visit every phone on the last day of the commission cycle, it is not practical to think that this will always be the case. It is practical to poll your phones on the last day of each commission cycle. By comparing the totalizer from the date of the most recent closing to the totalizer from the previous closing, an exact amount can be calculated. This is the best way to do this calculation.

In order to properly print and post your coin accrual entries, you must have polled your phones on the last selected date. If you have not polled a phone on the last of the two dates, a 0.00 dollar amount will be posted. If a board was replaced or defaulted, and not properly reprogrammed with the latest totalizer, the actual amount calculated will be posted, which is typically a negative number. These 0.00 and negative calculations can be easily identified, and manually fixed so that your commission calculations will be accurate.

Once the report has been verified, click on the **Post to the Acct Code** button to make the Accounting Journal entries.

Totalizer Delta by Customer

3/09/97   *Page 1*

6/01/96 vs. 7/01/96   30 Days   *14:27:53*

0.00 < Totalizer change < 99,999.99

ANI	I.D.		Amount 1	Amount 2	Difference	Daily Average
Customer	**10001 Elcotel Communications Svcs**					
Site:	**Big Dave's Bar & Grill**	1147 U.S. 41 South Bradenton, Fl 34432			**Fred Sillin**	
813-555-8191	8191	left phone	261.65	375.15	113.50	3.78
813-555-8192	8192	right phone	220.10	421.25	201.15	6.71
Site Totals:		2 ANI's	481.75	796.40	314.65	10.49
Site:	**University Park Country Club**	2261 First Blvd. Sarasota Park, Fl 34201			**Barbara Bilman**	
813-555-4859	4859	Near restroom	386.45	18.05	368.40-	12.28-
Site:	**Primo's! Italian Ristorante**	2226 S. Tamiami Trail Sarasota, FL 34243			**Morty Lewis**	
813-555-4876	4876	Lobby	121.50	166.10	44.60	1.49
Site:	**Pesos Steak Cantina**	7789 N. Tamiami Trail Nokomis, FL 34243			**Danny Ming**	
813-555-4877	4877	Lobby	68.80	105.15	36.35	1.21
Site:	**Colony Cove - Harmony Hall**	3315 Lakeshore Drive Palmetto, Fl 34222			**Fred Snyder**	
813-555-4399	4399	back by pool	2.25	13.95	11.70	0.39
Site:	**Colony Cove - Manatee Hall**	235 Harbor Circle Eustis, Fl 34222			**Fred Snyder**	
813-555-4392	4392	front entrance	7.00	14.00	7.00	0.23
Site:	**Bingorama**	1987 12th Street East Bradenton, Fl 34203			**Steve Norris**	
813-555-9538	9538	Back Wall	378.30	453.10	74.80	2.49
Site:	**E-Z Check Cashing**	3333 6th Street East Bradenton, Fl 34205			**Mary Davis**	
813-555-9053	9053	inside	226.00	336.05	110.05	3.67
Site:	**Sarasota Housing Authority**	5567 Dallas Avenue Sarasota, Fl			**Bob Jones**	
813-555-7013	7013	outside	0.00	119.05	119.05	3.97
Site:	**Sarasota Housing Authority**	7667 Beth Ave. Sarasota, Fl			**Bob Jones**	
813-555-7014	7014	outside	0.00	65.05	65.05	2.17
Site:	**Just for Boys**	24357 14th Street West Sarasota, Fl			**Sam Elliot**	
813-555-9809	9809	by soda machine	0.00	27.25	27.25	0.91
Site:	**Babe Ruth Little League Field**	Behind Boys Club Bradenton, Fl			**Bobby Bonilla**	
813-555-2454	2454	3rd base	0.00	574.80	574.80	19.16
Site:	**Fisherman's Landing**	3345 Braden River Road Ft. Myers, Fl 34203			**Sam Flounder**	
813-555-9562	9562	outside	0.00	10.80	10.80	0.36
Site:	**Salvation Army**	11228 147th Street Sarasota, Fl 34234			**Ellen Smith**	
813-555-7020	7020	outside entrance	0.00	1.00	1.00	0.03
Customer Totals:		**15 ANI's**	**1,672.05**	**2,700.75**	**1,028.70**	**34.29**

25. Totalizer Delta by Customer

This program allows you to print a listing of phones that shows you the change in totalizer amounts for a selected date range. This report prints in order by customer, then by site, then by ANI. Similar to all the other reports, this program allows you to choose a range of records to be printed, with selection criteria based upon the Customer, Site, ANI, Dates, and Notes.

Earliest date	Selects ANIs after the specified date. Any date preceding this date is skipped.
Latest date	Selects ANIs before the specified date. Any date after this date is skipped.
Lowest amount	Selects ANIs with more than the specified dollar amount. Any phone with a totalizer change lower than this amount is skipped.
Highest amount	Selects ANIs with less than the specified dollar amount. Any phone with a totalizer change higher than this amount is skipped.
Variables	Selects ANIs with the phone, site, and group code variables you want included in this report.

This report was designed to enable you to see the amount of coin collected by a phone over a specific time period. **In order to properly print, you must have polled your phones on the two selected dates.** If you did not poll on both days, the ANI will not be printed. In addition to the totalizer on each of the two days, the difference between the two is calculated, and the daily average coin receipts is calculated.

The most common use for this report is to find out the actual coin activity for a given phone over an entire month. By running the report from June 1 through July 1, (assuming that you pole just after midnight), you can get the actual coin receipts for the month from your phones without having to actually collect the phones.

You have the capability to limit this report by the amount of the difference between the two dates. For example, by entering $100.00 in the "Lowest Dollar Amount" and $9999.99 in the "Highest Dollar Amount", you will get a report showing only phones that made at least $100. in the selected time period. Conversely, by entering $.01 in the "Lowest Dollar Amount" and $50.00 in the "Highest Dollar Amount", you will get a report showing only phones that made less than $50. in the selected time period. This may be a list of phones that you should consider moving to a better location.

Missing Cost Accounting Entries

1/7/96
3:18 PM

Page 1

Acct Code 0   **1/3/97 through 3/3/97**

ANI	ID	Location	
Route:	Joe's Route		
Site:	Ana Coffee Shop	1702 S. 36 Street 2nd Floor S. Bernardo, FL 39989	Ana Cesse
(305) 555-8337	9911	Lounge	
(305) 555-8338	9526	Lobby	
Site Totals:	Ana Coffee Shop	2 ANI's	
Site:	University Park Country Club	2261 First Avenue Sarasota, FL 34201	Barbara Bilman
(305) 555-3718	3118	Near Restroom	
Site Totals:	University Park Country Club	1 ANI's	
Route Totals:	Joe's Route	3 ANI's	
Route:	Bridge and Overpass		
Site:	Luis Mobil	Corner of Ash and Oak Street Miami, FL 33908	Luis Hernandez
(305) 555-3363	1234	Right	
(305) 555-3384	2345	Left	
Site Totals:	Luis Mobil	2 ANI's	
Route Totals:	Bridge and Overpass	2 ANI's	

26. Missing Cost Accounting Entries

This report contains a listing of phones that are missing accounting entries within a selected date range. It displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and notes to be used in building the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include:

The Acct Code is	Selects the Account Code the report will be listing.
Date is between	Selects the date range for the report.
Variables	Selects ANIs with the phone, site, and group code variables you want included in this report.

This report enables you to automatically find potential problems in your cost accounting system. Typically, you will have certain cost accounting entries for each and every one of your phones for a given time period. For example, all phones should have phone bills on a monthly basis, and they will also hopefully have coin collections and OSP revenue. This is a quick way to pinpoint which phones do not have certain entries.

ANI	ID	Date	Technician	Code	Cost	Notes

<div style="text-align:center">

Commission Statements
6/1/96 through 7/1/96

</div>

7/7/96 *Page 1*
3:42 PM

ANI	ID	Date	Technician	Code		Cost	Notes

Route: Joe's Route

Site: **Big Dave's Bar & Grill** — 1147 U.S. 41 South Bradenton, Fl 34432 — **Fred Sillin**

ANI	ID	Date	Technician	Code		Cost	Notes
813-555-8191	8191	6/02/96	Joe Jackson	5	Info Cards	($150.00)	211 call by Edmond Fitzgerald
813-555-8191	8191	6/12/96	Joe Jackson	0	Unassigned Account	($0.25)	211 call by Pete Johnson
813-555-8191	8191	6/15/96	Joe Jackson	7	Volume Control Button	($0.25)	211 call by Ray Perkins
813-555-8191	8191	6/25/96	Joe Jackson	0	Unassigned Account	($0.25)	211 call by George Kennedy
813-555-8191	8191	6/27/96	Joe Jackson	2	Battery	($15.00)	
813-555-8191	8191	6/30/96	Joe Jackson	6	Board	($495.00)	211 call by Ken O'Brian
813-555-8191	8191	6/30/96	Joe Jackson	4	Keypad	($75.00)	
813-555-8191	8191	6/30/96	Joe Jackson	4	Keypad	($75.00)	

ANI Totals: 813-555-8191 — left phone — 8 records — ($810.75)

Month	Code		Cost	Month	Code		Cost
6/96	0	Unassigned Account	($0.50)	6/96	2	Battery	($15.00)
6/96	4	Keypad	($150.00)	6/96	5	Info Cards	($150.00)
6/96	6	Board	($495.00)	6/96	7	Volume Control Button	($0.25)

ANI	ID	Date	Technician	Code		Cost	Notes
813-555-8192	8192	6/5/96	Joe Jackson	1	Handset	($0.53)	211 call by John Rhodes
813-555-8192	8192	6/11/96	Joe Jackson	0	Unassigned Account	($0.25)	211 call by Chris Fenton
813-555-8192	8192	6/77/96	Joe Jackson	2	Battery	($15.00)	

ANI Totals: 813-921-8192 — right phone — **3 Records** — ($15.78)

Month	Code		Cost	Month	Code		Cost
6/96	0	Unassigned Account	($0.25)	6/96	1	Handset	($0.53)
6/96	2	Battery	($15.00)				

Site Totals: Big Dave's Bar & Grill — 2 ANI's — 11 records — ($826.53)

Month	Code		Cost	Month	Code		Cost
6/96	0	Unassigned Account	($0.75)	6/96	1	Handset	($0.53)
6/96	2	Battery	($30.00)	6/96	4	Keypad	($150.00)
6/96	5	Info Cards	($150.00)	6/96	6	Board	($495.00)
6/96	7	Volume Control Button	($0.25)				

27. Commission Statements

This report contains a listing of any or all income or expenses associated with a particular payphone. The report displays records in order by route, then by site, then by ANI. You can control the range of records contained in the report by defining the routes, sites, ANIs, and Notes to be included in the report.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. In addition, specific controls for this report include the following, any one of which, if true, will cause the record to be selected for processing.

Date is between (earliest and latest dates)   Selects ANIs for processing that were contacted between the dates entered.

Cost is between (lowest and highest amounts)   Selects ANIs for processing that have an associated cost between the amounts entered.

Technician is between   Selects for processing any records indicating services performed by one or more technicians whose names fall between the low and high range of values (e.g., from *Smith, John* to *Walters, Fred*).

Accounting notes include [   ]   Selects for processing one or more records containing the phrase or set of letters or numbers in the accounting notes. Examples of using this might be to process all records with *Commission* or *LEC Bill* in the notes.

Codes [*list of codes*]   Indicates records using one of the selected accounting codes will be picked up for processing.

Variables   Processes SMDR records with the site, phone, or group code variables you selected.

This report is capable of reporting any and all cost accounting codes, but the most common use is for reporting commissions. It differs from the cost accounting report in the way templates are stored and in the way data is sorted and displayed. This report, in conjunction with the cost accounting system, is a simple general ledger system. You are allowed to define up to 999 accounting codes to be used for tracking income and expenses associated with each of your phones.

On a daily basis, you can keep a record of anything that has to do with a phone, whether it is installation costs, coin collections, repairs, phone bills, or commissions. At the end of the month or at the end of a compensation period, you can build a report showing all activity (plus and minus) that you have had with each phone. This lets you easily calculate your income as well as your commission payments.

You can choose whether each individual entry should be printed or only a summary by phone number. You can include or exclude any accounting codes that you choose. You can pick the date range of the entries, as well as the technician associated with each entry.

Custom List/Stickers of Phones

12/3/96   *Page 1*

10:49 AM

ANI	ID	Location	Last Call	Keys		Serial #	Group	Notes
Route:	Joe's Route							
Site:	Bob's Big Burger		4455 Burger Rd. Burgerville, PA 44556				Bob Burger	
(305) 555-9172	2569	Bathroom	9/27/96	0000000000	0000000000			
(904) 555-9808	2527	Bus Stop	9/16/96	0000000000	0000000000			
(904) 555-9816	2527	Outside	9/27/96	0000000000	0000000000			
(999) 999-9999	9999	dummy fon		0000000000	0000000000	999999999		
Site Totals:		4 ANI's						
Site:	Ana Coffee Shop		1702 S. 36 Street 2nd Floor S.Bernardo, FL 39989				Ana Cesse	
(305) 555-8337	9527	Lounge	10/3/95	0000000000	0000000000			
(305) 555-9722	1809	Booth	10/3/95	0000000000	0000000000			
(305) 555-9998	5488	Inside	10/3/95	0000000000	0000000000			
Site Totals:		3 ANI's						
Route Totals:		7 ANI's						

**Section A
Normal Version**

Custom List/Stickers of Phones

12/3/96   *Page 1*

11:16 AM

ANI	ID	Location	Last Call	Keys		Serial #	Group	Notes
Route:	Joe's Route							
Site:	Bob's Big Burger		4455 Burger Rd. Burgerville, PA 44556				Bob Burger	
(305) 555-9172	2569	Bathroom	9/27/96	0000000000	0000000000			
(904) 555-9808	2527	Bus Stop	9/16/96	0000000000	0000000000			
(904) 555-9816	2527	Outside	9/27/96	0000000000	0000000000			
(999) 999-9999	9999	dummy fon		0000000000	0000000000	999999999		
Site:	Ana Coffee Shop		1702 S. 36 Street 2nd Floor S.Bernardo, FL 39980				Ana Cesse	
(305) 555-8337	9527	Lounge	10/3/95	0000000000	0000000000			
(305) 555-9722	1809	Booth	10/3/95	0000000000	0000000000			
(305) 555-9998	5488	Inside	10/3/95	0000000000	0000000000			
Site:	Ana Fashions		Waterfall Mall Miami, FL 33980				Ana Smith	
(305) 555-9543	1166	outside Pe	9/27/96	0000000000	0000000000			
Site:	Aquino Laundry		5th street Route 1 S.Miami, FL 39980				Ray Aquino	
(407) 555-9172	1233	Bathroom	10/3/95	0000000000	0000000000			
Site:	El Barrilito		Calle 8, 3rd Ave. Miami, FL 33980				Juan Valdez	
(305) 555-9406	9909	outside Pe	9/27/96	0000000000	0000000000			
Site:	El Dorado		Dorado Avenue Sarasota, FL 59980				Dorado Corp.	
(305) 555-9714	4444	Jewelers 2	9/27/96	0000000000	0000000000			
Site:	Luis Mobil		Corner of Ash and Oak Street Miami, FL 33908				Luis Hernandez	
(305) 555-9071	9237	Gas Tank	5/15/95	0000000000	0000000000			

**Section B
Compresed
Version**

(407) 555-9879   2/21/96   Rte: Joe's   Key: 0000000000

Miami Clutch & Brakes   right side

333 Main Street   ID 9879

                                         MAP:

(305) 555-8152   2/21/96   Rte: Joe's   Key: 0000000000

The Bootery Whse

1702 S. 36 Street

**Section C
Labels Version**

(305) 555-9722   2/21/96   Rte: Joe's   Key: 0000000000

Ana Coffee Shop   Booth

1702 S. 36 Street   ID 1809

2nd Floor   MAP:

(305) 555-9998   2/21/96   Rte: Joe's   Key: 0000000000

Ana Coffee Shop   Inside

1702 S. 36 Street   ID 5488

2nd Floor   MAP:

28. Custom List / Stickers of Phones

This report is derived from the **Phone Master Report by Route**. The printout for the report is identical, but the method of selecting phones for the report has been enhanced. Specific changes have been made to create a report that is better suited for the needs of some users.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. In addition, there are special variables that apply to the SMDR records to be chosen. You can set the range of any one or all of the following variables:

Individual ANI's are added to the report using the **Add Phones** drop down box and clicking on the **Add** button. You may add the same phone to the report several times if multiple labels are required for that phone.

The default format is referred to as the **Normal** version. As you can see by looking at section A, this version contains a site name along with the site address and the contact at that particular site. Every ANI located at that site is then printed, showing the most recent contact date with the ANI, the keys for the cashbox and upper housing, the serial number, the type of installation, and any notes that have been entered into the database record.

The second version, called the **Compressed** version, contains the same information as the Long version. The major difference is that there are no titles and no blank lines between routes and sites. While this layout might be tougher to read, you can print three times as many phones on a page. This layout is depicted in section B.

The third version, referred to as **Labels**, contains information about each ANI on a 1" by 4" label, either in a one-up, two-up, or three-up format. The two-up format is depicted in section C.

You can use labels for file folders or to aid in cashbox accounting. With the capability to print the labels on a route by route basis and only if the cashbox amount is over a certain threshold, you can print the labels, pull the keys that are depicted on the labels, and send your collector on his way.

Once at the site, the collector can place the label on an empty cashbox, remove the old cashbox, and install the new cashbox. The old cashbox is then forwarded to the accounting group. By looking at the label, the accounting group can see where the box came from and when it was originally installed.

If desired, the barcoded ANI can be read into a coin counting machine, the box dumped and counted, and the resulting figures entered into the cost accounting function. A report that compares the actual coin count to the amount reported by the phone can then be run, and any discrepancies can be noted and addressed.

SMDR Summary for Coin Calls

2/7/96

3:18 PM

Page 1

1/5/96 through 1/5/96

ANI	ID	Call Type	Count	Duration in seconds	Price
Route:	Joe's Route				
Site:	Ana Coffee Shop	1702 S. 36 Street 2nd Floor S. Bernardo, FL 39989		Ana Cesse	
(305) 555-8337	9527				
		4 Sent paid local calls	30	3255	$7.50
		5 Sent paid IntraLATA calls	1	93	$1.00
		6 Sent paid InterLATA calls	4	575	$4.00
		7 Sent paid InterState calls	1	14	$1.00
ANI Totals:	(305) 555-8337		64	8468	$13.50
(305) 555-9722	1809				
		4 Sent paid local calls	46	3544	$11.50
ANI Totals:	(305) 555-9722		92	10842	$11.50
(305) 555-9998	5488				
		4 Sent paid local calls	45	5542	$11.25
		5 Sent paid IntraLATA calls	3	250	$3.00
		7 Sent paid InterState calls	2	342	$3.00
ANI Totals:	(305) 555-9998		86	10189	$17.25
Site Totals:	Ana Coffee Shop	3 ANI's	242	29499	$42.25

Call Type	Count	Duration	Price	Call Type	Count	Duration	Price
4 Sent paid local calls	121	12341	$30.25	5 Sent paid IntraLATA calls	4	343	$4.00
6 Sent paid InterLATA calls	4	575	$4.00	7 Sent paid InterState calls	3	356	$4.00

29. SMDR Summary for Coin Calls

This report is similar to **SMDR Summary by Category** but it will only list calls that have had a coin collection for your phones. It contains totals of the SMDR (call records) that you have collected from your phones. This report displays records in order by route, then by site, then by ANI. This report also enables you to select records based on a large number of selection criteria, including the date range of the calls, the ANI, Site, Route, Grand Totals, Call Types, and Variables.

This report enables you to see what coin traffic is originating from each of your phones.   You can use this report to find out what types of calls are being made and how much money you are making.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*.

Selection criteria specific to this report include the following:

Earliest date	Selects ANIs after the specified date. Any date preceding this date is skipped.
Latest date	Selects ANIs before the specified date. Any date after this date is skipped.
Variables	Selects ANIs with the phone, site, and group code variables you want included in this report.

When you print the report, you will see a total for each category of call that was made, denoting the call type, how many calls, the total duration of the calls, and the total amount of money deposited for those calls.

	Reason Terminated Report			*7/7/96*		*Page 1*
	6/1/96 through 7/1/96			*3:42 PM*		

ANI	Contact Time	Duration	Poll List	Port	Call Type	Alarms
Reason Terminated:		CD Dropped				
(305) 555-8337	6/5/96 9:10:36 AM	31	Saturday-1	1	3	70
(305) 555-9722	6/13/96 4:11:24 PM	1	Pgm	1	3	100:63
(305) 555-9998	6/24/96 10:37:22 AM	18	Pgm	1	3	D:P:63
Number of Records:		3				
Reason Terminated:		Login Failed				
(305) 555-9998	6/2/96 8:13:27 AM	18	local	1	3	51
(305) 555-8337	6/3/96 9:18:32 AM	22	local	1	3	51
(305) 555-9998	6/4/96 10:17:52 AM	18	local	1	3	51
(305) 555-9722	6/4/96 3:31:47 PM	22	local	1	3	51
(305) 555-9998	6/5/96 10:37:22 AM	18	Pgm	1	3	51
(305) 555-9998	6/5/96 10:38:55 AM	18	local	1	3	51
(305) 555-9722	6/6/96 4:11:24 PM	22	Pgm	1	3	51
(305) 555-9722	6/6/96 4:12:54 PM	22	local	1	3	51
(305) 555-9998	6/9/96 9:23:42 AM	18	local	1	3	51
(305) 555-8337	6/10/96 9:10:36 AM	22	local	1	3	51
(305) 555-9722	6/10/96 4:11:24 PM	18	local	1	3	51
(305) 555-9998	6/11/96 10:37:22 AM	18	Pgm	1	3	51
(305) 555-9722	6/12/96 4:11:24 PM	20	local	1	3	52
(305) 555-8337	6/13/96 9:10:36 AM	20	local	2	3	52
(305) 555-9998	6/16/96 10:37:22 AM	18	Pgm	1	3	51
(305) 555-9722	6/16/96 4:11:24 PM	18	local	1	3	51
(305) 555-9998	6/17/96 10:35:52 AM	18	local	1	3	51
(305) 555-9998	6/17/96 10:37:22 AM	18	local	1	3	52
(305) 555-8337	6/18/96 9:10:36 AM	20	local	1	3	51
(305) 555-9998	6/18/96 10:37:22 AM	18	Pgm	1	3	52
(305) 555-9722	6/19/96 9:11:24 AM	21	local	1	3	51
(305) 555-9998	6/19/96 10:37:22 AM	18	local	1	3	51
(305) 555-9998	6/20/96 10:37:22 AM	18	local	1	3	51
(305) 555-9722	6/23/96 4:11:24 PM	21	local	1	3	52
(305) 555-9998	6/24/96 10:37:22 AM	18	local	1	3	52
(305) 555-8337	6/24/96 11:10:36 AM	18	local	1	3	51
(305) 555-9998	6/24/96 12:37:22 PM	18	Pgm	1	3	51
(305) 555-9722	6/25/96 4:03:14 PM	21	local	1	3	51
(305) 555-9722	6/25/96 4:06:43 PM	21	Pgm	1	3	51
(305) 555-9722	6/25/96 4:10:53 PM	21	local	1	3	51
(305) 555-9722	6/25/96 4:13:24 PM	22	local	1	3	52
(305) 555-9998	6/26/96 10:37:22 AM	18	local	1	3	52
(305) 555-8337	6/27/96 9:10:36 AM	20	local	1	3	52
(305) 555-9722	6/27/96 4:11:24 PM	22	local	1	3	51
(305) 555-9998	6/30/96 10:37:22 AM	18	local	1	3	51
(305) 555-9722	6/30/96 4:11:24 PM	18	local	1	3	51
Number of Records:		36				
Reason Terminated:		Missing DB Record				
(305) 555-9998	6/18/96 12:07:21 PM	20	test phone	1	3	H:M:65
Number of Records:		1				
Reason Terminated:		File does not exist				
(305) 555-8337	6/15/96 11:16:03 AM	58	Saturday-1	1	3	65
(305) 555-9722	6/23/96 3:46:41 PM	56	local	1	3	65
Number of Records:		2				
Reason Terminated:		Busy				
(305) 555-8337	6/26/96 10:36:08 AM	0	local	1	3	100
Number of Records:		1				
Reason Terminated:		No Carrier / No Answer				
(305) 555-9998	6/4/96 1:31:12 PM	0	Pgm	1	3	100
(305) 555-8337	6/9/96 9:10:36 AM	0	local	1	3	100
(305) 555-9722	6/13/96 5:21:34 PM	0	Pgm	1	3	100
Number of Records:		3				
Reason Terminated:		CRC Error				
(305) 555-9722	6/23/96 2:16:27 PM	47	local	1	3	71
Number of Records:		1				

30. Reason Terminated

This program enables you to print or view a list of occasions that you have been unable to collect data requested from your phones. This report prints in order by Reason Terminated, then by Contact Time. Similar to all of the other reports, this program allows you to select records based upon a large number of selection criteria. This includes the date range of the calls, the time range of the calls, port number, specific reason terminated, poll list, and call type. In addition to selecting which records will print, you can also specify what detail should print, and whether or not to skip to a new page after certain totals are printed.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include the following:

Contact Date is between (earliest and latest dates)	Selects ANIs for processing that were contacted between the dates entered.
Contact Time is between (lowest and highest amounts)	Selects ANIs for processing that were contacted between the times entered.
Port Number is between	Selects for processing any records indicating the use of specific modem ports.
Reason Terminated is	Selects for processing any records indicating the selected termination reasons.
Poll List is	Selects for processing any records from the selected Poll List.
Call Type is	Selects for processing any records where the phone was contacted by the chosen Call Type.
Variables	Processes records with the site, phone, or group code variables you selected.

This report can be used as a troubleshooting tool if you are experiencing polling problems. The fields displayed include ANI, Contact Time, Duration, Poll List Name, Port, Call Type, Alarms, and Reason Terminated. The report is sorted by Reason Terminated and Contact Time, with subtotals for each Reason Terminated. The subtotals include a count of records.

Estimated LEC and IXC Charges *7/7/96*   *Page 1*
3:42 PM

Type	Flat Rate	Minute Rate	Minutes (Tenths)	Charge Estimate
LEC				
IXC				
Totals				

31. Charged Rates Estimates

This program enables you to print or view a list of phone charge expenses you should expect for your payphones. This program allows you to select records based upon charge plan and the date range of the charges.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling Report Contents*. Selection criteria specific to this report include the following:

Select Records When the Charge Plan is…   Select from the drop down list of available charge plans.

Select Report   Select a report from either Estimated Charges or Related SMDR Detail.

Include Data that Shows that the Date is between…   Enter a starting and ending date for the information you want in your report.

Run   Runs the report for the selected data.

This report can be used to estimate your operating expenses for tax purposes. The fields displayed include LEC, IXC, and Totals. The report is sorted by Charge Type with subtotals for each type in the right column.

Type	Count	Income	Tax Rate	Tax Estimate
Local				
IntraLata				
InterLata				
InterState				
Other				
Totals				

Federal Tax Responsibility Estimate *7/7/96* *Page 1*
3:42 PM

32. Tax Responsibility Estimates

This program enables you to print or view a list of tax expenses you should expect for your payphones.
This program allows you to select records based upon tax plan and the date range of the tax period.

You can control this report by using the selection criteria discussed in Section 3.3.2, *Controlling
Report Contents*. Selection criteria specific to this report include the following:

Select Records When the Tax Plan is…	Select from the drop down list of available tax plans.
Select Report	Select a report from either Federal Estimate, State Estimate, City Estimate, Local Estimate, Other Estimate, or Related SMDR Detail.
Include Data that Shows that the Date is between…	Enter a starting and ending date for the information you want in your report.
Run	Runs the report for the selected data.

This report can be used to estimate your tax responsibility. The fields displayed include Local, IntraLata, InterLata, InterState, Other, and Totals. The report is sorted by Call Type with subtotals for each type in the right column.

APPENDIX D. TROUBLESHOOTING

Following are the solutions to some problems you might encounter when using PNM Plus. If the problem you have encountered is not listed here, you can call Elcotel's customer service department at 1-800-ELCOTEL.

Problem	Cause	Solution
Poll Manager is shut down, but the modem continues to take incoming calls.	Modem's auto answer feature is not disabled.	Set the Reset command to *AT [%F] S0=0*, where *%F* is the modem specific command that restores factory settings. See your modem's user guide for the value that belongs in the [ ].
PNM Plus reports do not print to my HP Deskjet 600/660 C printer.	Your computer has RAM Doubler loaded.	Do one of the following: • Remove RAM Doubler from your machine. • Do not print on an HP Deskjet 600/660 C printer
Poll Manager locks up when my database, which is located on a network drive, becomes large.	Poll Manager exceeds network file locks when storing data.	Do one of the following: • Increase network file locks. • Move the database to the Poll Manager machine.
Poll Manager performed an illegal instruction: MSAJ1200.DLL at 0026:17E0	This is an MS Access dll.	Reboot your computer.
A General Protection Fault occurs.	System has run out of working memory.	Do the following: 1. Exit Windows. 2. Remove all temp files from your temporary directory. 3. Run scan disk. 4. Restart Windows.

| PNM Plus runs slowly. | Your database has too much data. | You can do the following:

• Purge data using the Purge function in Utilities

• Compact and repair databases using the Cleanup function in Utilities. (Recommend this be done once a week.)

• Back up your database once a month and start a new database. |
| Poll Manager runs slowly. | You have too many phones in your poll list. | Limit the number of phones per poll list to 500. |

APPENDIX E. LIST OF STATUS MESSAGES

This section describes the Status Messages or Error Messages you may receive during normal operation of PNM Plus and the possible causes for these messages. The first table shows Reason Terminated Messages your may encounter through Poll Manager.

Table E-1

Reason Terminated	Possible Cause
Call Completed	Successful Call.
CD Dropped	The connection was dropped. Possible indication of network problem, or database size too big.
Logon Failed	Incorrect ID or Password.
Unknown ID	Not currently used.
DB Error	Failed to open database.
Missing DB Record	A critical database record is missing - e.g. Phone Record, R&O Record. A slow network or huge database could cause this.
Invalid Phone Model	Attempt to communicate with a phone that is an invalid phone model. Currently, PNM Plus only supports Pgm 5.3.0 and higher.
Comm Lib Error	Communications library missing / failure.
Disk Full	Unable to write to the disk: disk full.
File Does Not Exist	PNM Plus tried to send a non-existent file to the phone. Poll Manager assumes that all operational files are stored in the same directory as the database. Check for proper path.
No Answer	Not frequently used.
Busy	Modem detected a busy signal from the phone.
No Carrier / No Answer	This response is returned from the modem if it receives no answer from the phone after X seconds.
CRC Error	Caused by repeated bad checksum errors. Typical in less than 1% of SMDR transmissions.
Unknown Command	Version data not received from the phone.
SW Error	Internal software error occurred.
Out of Memory	Failed a memory allocation.
SW Timeout	This occurs if "No Carrier" timeout in modem is less than "Connect Resp Timeout" in phone and phone rings out, OR it may be an indication of network problems / huge database.

In PNM Plus there are phone alarms and command alarms. For every command that you send to a phone, there is a possibility of the alarm failing - and if so, a command alarm will occur. Between a command alarm and a reason terminated, you should be able to determine why a call failed. Here are some Command Alarms (Phone Alarms) you may see while viewing the status of the last poll, or contact history.

Table E-2

Command Alarms	Possible Cause
No Contact	Phone never answered.
Logoff	No response from phone after sending the logoff command. Possible network / database size issue.
Send ID	Bad ID. Also possible bad INIT string issue.
Send Password Failed	Bad Password.
Get Version Failed	
Get ID Failed	
Set Date/Time Failed	
Keep Alive Failed	
Dnld Voice Failed	PNM Plus will only download compressed files. Some voice files are not compressed.
Dnld Speed Dial Failed	File not found in database directory.
Upld SMDR Failed	Repeated bad checksum in SMDR block from phone.
Clear Alarms Failed	
Reload RAM Failed	
Reset Totalizer Failed	
Dnld Program Failed	File not found in database directory.
Dnld Rates Failed	File not found in database directory / INIT string problem.
Dnld Reg/Opt Failed	Database record containing Registers & Options for this phone corrupt / missing.
Dnld Priority Parse Failed	File not found in database directory.
Upld Status Failed	
Upld Call Counters Failed	
Upld RAM Image Failed	
Upld Diag Block Failed	
Clear Call Counters Failed	
Burn RAM to EEPROM Failed	
Run From ROM Failed	
Master Block Dnld Failed	

Glossary

Access Number: The phone number the payphone must dial to reach the desired carrier or services. The number must include all dialed digits, such as 1-800 if applicable. This number is downloaded to the payphone with the Registers and Options file.

Accounting Entry Detail: Each accounting entry in the accounting journal consists of an ANI, Account Code, Date, Amount, Technician and Notes. These entries can be added, deleted or modified through this screen.

ACTS: Acronym for Automated Coin Toll Service. The ACTS provides rating and supervision of toll coin calls for Coin line service.

ANI: Acronym for Automatic Number Identifier. The ANI is commonly used as a term to identify the payphone site telephone number (NPA-NXX-XXXX).

Answer Detect: Detect the ability to determine when a call is answered. The payphone can be programmed to use answer detect to determine when to collect or refund coins. Answer detect is also referred to as "answer supervision" and "voice detect."

Answer Supervision: The ability to determine when a call is answered. The payphone can be programmed to use answer supervision to determine when to collect or refund coins. Answer supervision is also referred to as "answer detect" and "voice detect.".

ASCII: Acronym for American Standard Code for Information Interchange, the standard format for representing characters in IBM-compatible personal computers.

Authorization Code: The code the payphone must give to the IXC or OSP to gain access. Typically, this is the payphone ANI, and this field will be initialized with the ANI by the program. You may type over that number and enter any other number you require.

Auxiliary Board: The printed circuit board that is mounted above (in front of) the main board on the Payphone Control Module (PCM) assembly. Sometimes referred to as the "piggyback" board.

Backup: To make copies of data and programs to insure against accidental loss.

Band: One set of initial and additional rate and time data. Also referred to as "price band."

Base Template: The initial set of Registers and Options used in setting up a phone's configuration. It is not necessarily identical to the actual phone's settings. This is simply the starting point before individual changes can be made.

Baud: A unit of signaling speed in data transmission associated with modem telecommunications. Baud represents the number of signaling elements per second. When the signaling element is a bit, baud rate equals bits per second (BPS). Information is passed between PNM and a phone over a 300 Baud or a1200 Baud modem. Note that when each signal element represents something other than a single bit, baud and BPS are not synonymous.

Bit: Acronym for binary digit, the basic unit in the binary numbering system used in digital equipment (computers). Computers use the binary (base 2) numbering system because it requires only the two binary digits (bits) "0" and "1", which can be represented electronically by "on" and "off" states in the computer circuitry.

BONG: In 0+ dialing protocol, the signal that alerts the user to enter a TELCO credit card number (or swipe the card). The BONG sound may be created by either the CO (external) or by the payphone (internal).

BPS: Abbreviation for bits per second, a measure of data transmission speed.

Bright: A mode of payphone operation for coin line application in which the payphone uses the Central Office to handle rating, routing, and answer supervision. Bright mode operation does not require maintenance of rate tables.

Buffer: A temporary storage area, often in RAM in a computer or peripheral device such as a printer.

Burn to EEPROM Command: An instruction that copies selected files or data currently in RAM to an Electrically Erasable Programmable Read Only Memory chip.

Bypass Code: An eight (8) digit security bypass code. Must be numeric.

Byte: The data unit that can represent one character in a computer. In most computers, one byte consists of eight bits. For most personal computers, ASCII defines the correspondence between the possible bit patterns (on or off states) in a byte and the characters thus represented.

Call Completion: The moment when the payphone determines that coins should be collected. Call completion occurs a specified amount of time (call completion timer) after answer detect.

Call Home: Call from a payphone to PNM Plus.

Call Screening: A TELCO subscription feature that protects the payphone owner from fraudulent calls by alerting the TELCO operator that the phone is a payphone and, therefore, not a billable number.

Call Termination: The moment when either the called party or the caller hangs up or the purchased time expires and the call is terminated.

Call Typing: Categorizing calls according to processing requirements. Calls are typed according to programmed logic that considers the pattern of the digits dialed, the nature of the target number, the method of payment, and so on.

Cashbox: The metal container for coins that are accepted as payment for the call.

Cashbox Vault: The portion of the lower housing of a payphone that protects the cashbox.

CCC: Abbreviation for Commercial Credit Card.

CCT: Abbreviation for Call Completion Timer.

Central Office: The central office (CO) is the place where telephone calls originate. When dialing out of the LATA, the CO switches the call to the proper carrier.

Channel: That part of a communication system that connects a message source to a message destination. Also referred to as circuit, link, line, and path.

CHAT: The communications program in Payphone Network Manager (PNM).

Clearing: The process of erasing "counts" accumulated by counters, or the "flags" (warning notes) about alarms posted in PNM screens.

Click: Control of a computer function by quickly pressing then releasing the mouse button when the cursor is positioned over the screen item to be controlled.

CO: Abbreviation for Central Office (see above).

COCOT: Acronym for Customer-Owned, Coin-Operated Telephone.

Coin Chute Assembly: The unit that channels the coins past the coin detect switches before they enter the coin-relay hopper.

Coin Line: A type of telephone line commonly used for dumb payphone operation. Payphones operating on a coin line rely on the central office for rating, routing, and coin disposal (answer supervision).

Coin Relay Hopper: The assembly that temporarily stores the coins until call completion, when it channels the coins to the cashbox, or, if the call attempt is terminated prior to call completion, it refunds the coins to the coin return receptacle.

Coin Return Receptacle: The die-cast tip-out container labeled "PUSH FOR COIN" that receives refunded and rejected coins.

COM1:   Names assigned to serial communication ports on IBM-compatible personal computers.

COM2:   Names assigned to serial communication ports on IBM-compatible personal computers.

Commission Plan: Revenue arrangement specified between you and the owner of the location where the payphones are situated.

Commission Plan Basis: The list of accounting codes used to calculate the revenue amount for this plan.

Commission Plan Schedule: Describes the plan calculation formula and the account code that will be automatically added to the account journal containing the calculated commission amount.

Common Carrier: A company that performs telecommunications.

Configuration File Editor: A menu-driven program in PNM that assists the user in creating, renaming, deleting, or printing configuration files.

Contract: An agreement with a customer that describes the terms and conditions under which the payphone has been installed at a site.

Corridor: or IntraState NPA boundaries. This type of call may have different pricing and/or dialing patterns from a regular local call. Corridor calling may be defined by LEC tariffs or by FCC tariffs.

Corridor Calling Area: Refers to a local call that crosses InterState and/or IntraState NPA boundaries. This type of call may have different pricing and/or dialing patterns from a regular local call. Corridor calling may be defined by LEC tariffs (IntraState) or by FCC tariffs (InterState).

Cost Accounting Journal: A list of detail line items containing the entry date, phone number, account code and dollar amount spent or collected.

CPU: Abbreviation for Central Processing Unit, the hardware element that contains the arithmetic logic unit of a computer. The CPU for a personal computer or a smart payphone (mounted on the Payphone Control Module assembly) is a microprocessor.

Critical Site: The critical site flag can be turned on to indicate special handling requirements needed for a site. You define what "special handling" means. The program alerts you any time the site is displayed on the navigation screen that it deserves special attention.

Current: The flow of electricity, measured in amperes.

Current Payphone Selection: The selected payphone identified as the one whose ANI appears in the center panel of the status bar at the bottom of the Main screen.

Customer: Individuals or corporations that own or control the location where the payphones are installed.

Daylight Savings: Normally checked to indicate that the site observes daylight savings time, this flag is used during polling to ensure the polling window is observed.

Decibel: A unit that measures the relative difference in sound power. One decibel (1 dB) is the smallest amount of change in sound power level that the human ear can detect.

Default: A value which is in effect initially and/or in the absence of a user-specified value.

Diagnostic Block: Call related data, including user-dialed numbers, hook-flashes, and coins deposited, is saved and may be uploaded for viewing in PNM Plus.

Dial Housing: The mount for the touch control unit, terminal board and the hookswitch, which mounts onto the upper housing.

Dialing 0 for Operator Assistance: Some localities require the user to dial zero (0) to connect to a local operator. If phone has secondary dial tone, indicate by checking the check box.

Dialing Pattern: The order and sequence of digits dialed by a telephone user and used by the telephone equipment to route the call.

Dialing Prefix: This data item is used to store dialed digits used in front of the payphone's ANI when calling a phone at this site from the Operator Console or by the Poll Manager. This data is not downloaded to the phone and only applies to outbound calls from your location to the phone. Into this data item you can enter PBX codes used to get out of your location or IXC auth codes as needed for outbound calls.

Directory: A list of files on a storage medium such as a diskette or hard disk. A hard disk usually has groups of directories, starting with the main or "root" directory and extending through a hierarchy or tree of subdirectories.

Directory Assistance Charges: If you are legally able to charge for directory assistance calls, enter the amount you can collect.

Disable: To turn OFF a smart payphone option.

Discount Period: Period of time during which less than the full price of a call may be charged.

DOS: Acronym for Disk Operating System, the computer software that directs the flow of data among the keyboard, monitor, printer, and disk drives in a personal computer. Without an operating system, the computer cannot function. IBM-compatible computers use MS-DOS or PC-DOS.

Downloading: The process of sending data or complete files from PNM to the payphone.

Downloading to a Payphone: A process of sending data or complete files from PNM Plus to the payphone.

DTMF: Abbreviation for Dual Tone Multi-Frequency signals, which are analog signals created by TELCO equipment, a keypad or "TCU" (touch call unit), or a pocket dialer.

ECM: Abbreviation for Electronic Coin Mechanism.

EEPROM: Acronym for Electrically Erasable Programmable Read-Only Memory. This memory chip is similar to an EPROM except that this memory chip can be erased and reloaded after receiving an electronic signal, either through voice telemetry or by using PNM in modem telemetry.

Enable: To turn ON a smart payphone option.

EPROM: Acronym for Erasable Programmable Read-Only Memory. This memory chip can be erased and reprogrammed, but only by a special process in a factory setting. Once programmed, it is non-volatile; that is, loss of power does not cause loss of data.

Exchange: A TELCO switching center identified by a three-digit prefix (NXX). All telephones within the exchange usually share the same schedule of charges.

Extended Calling Area: Refers to calls that terminate to locations such as the Caribbean (Bermuda, Puerto Rico, Virgin Islands and other Caribbean islands) with NPA 809.

FCC (InterState):   Refers to telephone rates regulated by the Federal Communications Commission for calls that cross state borders.

Feature Group: A telecom network term for the type of access to another carrier or from one TELCO to another.

File: A collection of related records treated as a unit.

Frequency: The number of repetitions per unit of time of a complete waveform, as of an electric current. Frequency is measured in Hertz.

G94 File: File containing registers and options for Series 3 or Series 4 payphones.

Ground Start: A method to signal the CO that a calling party has gone off-hook. The payphone initiates a ground start by momentarily grounding the ring wire before outpulsing. A TELCO line may be either ground start or loop start.

HAC: Abbreviation for Hearing Aid Compatible.

Handled Problems: The list of all problems reported that were handled by the PNM Plus operator and their resolution, i.e., re-dialed phone that reported a No Contact alarm, or a work order was assigned. The information provided in this list includes ANI of the remote phone; Contact Time; Alarm or problem reported; Action Resolution, and Operator ID.

Handset: The hand-held unit that contains the payphone receiver and microphone.

Hertz (Hz):   A unit of frequency equal to one cycle per second.

Holding Queue: A placeholder where cost accounting journal entries are "temporarily" placed. You can add, modify or delete entries in the queue while in the Accounting Journal Entry screen. The entries in this queue are not copied into the database until you click on the Add to Database button.

Hookflash: A momentary "on hook" signal.

Hookswitch: A switch that is actuated by the removal of the handset from its hanger.   An "off-hook" status signals the TCU terminal board to open the line, returning dial tone to the receiver. "On-hook" status signals the TCU to close the line.

Housing: The metal body, or cabinet, of a payphone.

Hybrid: A mode of payphone operation for coin line applications in which the payphone can be configured by call type to use the Central Office or the payphone internal capability to handle call rating, routing, answer supervision. Rate table maintenance is required in the hybrid mode.

Hybrid Module: A circuit component similar to a general purpose integrated circuit (IC chip) but designed and fabricated to perform a specific function. Often proprietary and made on a custom basis.

Incoming Problems: This is the list of problems that are reported by a phone that initiated an incoming call. Just as for the polled problems, the incoming list provides ANI, Contact Time, Cashbox Amount, Cash Change Amount, Call Change, Reason for call termination, Duration of the call in minutes, Alarms reported by phone.

Incoming Telemetry Commands: List of commands to be executed during an incoming call from the remote phone to PNM Plus.

InterLATA: Refers to a call from one LATA (Local Access and Transport Area) to another. These calls are carried by an Inter-exchange Carrier (IXC).

InterLATA Calling Area: Refers to a call from one LATA (Local Access and Transport Area) to another. These calls are carried by an Inter-exchange Carrier (IXC).

InterState Calling: Refers to a call that originates in one state and terminates in another. These calls are carried by Inter-exchange Carriers (IXC).

IntraLATA: Refers to calls within the same LATA (Local Access and Transport Area). These calls are carried by the Local Exchange Carrier (LEC).

IntraLATA Calling Area: Refers to a call within the same LATA (Local Access and Transport Area). These calls are carried by the Local Exchange Carrier (LEC).

IXC: Abbreviation for Inter-exchange Carrier, a company that carries telephone communications from one LATA to another.

Kilobyte (Kb): 1024 bytes of data or program storage space.

LATA: Local Access and Transport Area, a calling area that reflects common social and economic communities of interest and does not necessarily correspond with exchange (NXX), area code (NPA), or political boundaries.

LEC: Acronym for Local Exchange Carrier, a company that administers telephone service in a city or town and surrounding area, typically including one or more COs and associated switching equipment.

Loading: The process of putting a file or a program into usable space in a computer. Also, in PNM, the process of selecting tasks to be done for a payphone or list of payphones.

Local Calling Area: A telephone industry term referring to a group of prefixes that can be called locally from a given NPA-NXX. Local calling areas are based on communities of common interest rather than mileage. Each local calling area has strict pricing and dialing pattern definitions established by the LEC.

Loop: The local path between the Central Office and the payphone. An electrical current path composed of one conductor from the CO to the telephone and another conductor from the telephone back to the CO forms the loop. The loop conductors are called "tip" and "ring."

Loop Start: A method used to signal the CO that a calling party has gone off-hook. The CO switching system supplies battery (voltage) on one side of the line and ground on the other side. When a connection is made between tip and ring at the payphone, current flows through the completed loop. Note that the TELCO line may be either a loop start line or a ground start line.

Lower Housing: The part of the housing that contains most of the payphone components, including the microprocessor.

LPT1, LPT2, LPT3: The names assigned to parallel printer ports on IBM-compatible personal computers.

Macro: A set of commands to be executed in sequence. In a smart payphone, a dialing macro establishes how and when to send digits to the CO for processing for each call type.

Main Board: The larger of two printed circuit boards in a payphone control module (PCM) assembly.

Map Coordinates: To help anyone unfamiliar with the territory locate a site, you can enter grid coordinates from a city map here (such as E10 B6). This entry is optional.

Master Record: Payphone unique data including ID, address and name, password, authorization codes, as well as the names of the configuration files required by that phone. The master record can be edited in Payphone Network Manager (PNM).

MDM: The Multiple Database Manager utility.

Megabyte (Mb):   1024 kilobytes (1,048,576 bytes) of data or program storage space.

Microprocessor: The central processing unit (CPU) of a personal computer or smart payphone.

Miscellaneous Calling Area: This is a category provided for your convenience in case you prefer to identify and manage a particular pricing requirement outside the standard categories.

Modem: A device that converts digital signals, as from a computer, to analog wave signals for the purpose of transmission over telephone communication channels. The modem MOdulates the signal at one end, then DEModulates at the other end of the transmission. Modem telemetry enables the PNM Plus-to payphone communication linkage.

Modem Telemetry: The transmission of modulated digital data (in analog form) over a communication channel. The process requires a modem at each end of the communication channel. Modem telemetry is the method the PNM Plus operator uses to create a communications link with the payphone and vice versa.

Monitor: The display terminal connected to a computer.

NANP: Abbreviation for North American Numbering Plan.

Navigation Screen: The navigation screen is a powerful data presentation and program control screen. It derives its name from giving you the ability to "navigate" through many types of database information quickly and easily. Data about a payphone is organized in a hierarchy, and you can start at the top of the hierarchy and work your way down, or you can start at the bottom and work your way up, or start anywhere in between. The navigation screen can serve as your *home base*, from which you can get to other screens to add, update, and delete payphone and payphone-related information.

New Password: New 8 character password to be assigned to the payphone. This password will be downloaded to the payphone during the next dial up session.   At that time, the database will be altered so that this value becomes the *Password* and the *New Password* will be set to blanks

New Phone ID: New 4 digit identifier to be assigned to phone. This ID will be downloaded to the phone automatically during the next dial up session with the phone. At that time, the database will be altered so that this value becomes the *Phone ID* and the *New Phone ID* will be set to blanks

Next Contact Telemetry Commands: List of commands to be performed the next time the remote phone is contacted. These commands are performed before any outgoing or incoming commands take place.

No Contact Problems: The No Contact index tab displays the list of all phones that were dialed, but to which contact was not established. The most frequent reason for a no contact is lack of a phone line connection at either the remote phone or at the PNM Plus console. The information provided includes ANI of the remote phone, Contact Time, Reason for call termination, Poll list used to dial this phone. From this screen you are also able to select the phone and press Re-dial button to attempt to contact the phone.

Noise: Interference or unwanted sound on a line that can be the result of proximity to other lines or electrical devices, transmission of other electrical devices sharing the same line, or the result of CO switching equipment.

NPA: Abbreviation for Numbering Plan Area. Also known as Area Code, an NPA is the three-digit number that precedes the seven-digit telephone number. NPAs are assigned to a major North American geographical areas, including Canada, USA, Mexico, Bermuda, the Bahamas, and Puerto Rico.

NXX: The three-digit prefix, preceding the subscriber number (NPA NXX-XXXX). NXX is often, but not always, related to an exchange.

ODBC: Acronym for Open Database Connectivity. A standard that permits data exchange between compatible software applications and databases.

Off-Hook: The state of the phone when the handset is lifted from its cradle. This action will send a request to the central office for dial tone, or answer an incoming call.

On-Hook: The state of the phone when the handset is resting in the cradle. The phone is not connected to any particular line. This is the normal, inactive condition of a telephone system device.

Operational Files: The files that are downloaded to a payphone to allow it to operate properly at its site. The minimum files that must be downloaded to a phone are the C94 (ROF) and R94. The P94, S94 and V94 (PGM) files can be downloaded to provide value added features.

Option: An Option is a program switch that enables or disables a payphone feature depending on whether the option is set to ON or OFF, respectively.

Outgoing Telemetry Commands: The set of commands to be performed during polling session.

Owner Bypass Code: An eight digit keypad entry code used by the owner-operator to access the voice telemetry mode, allowing a person to program and/or test the payphone.

P94:   The Priority Parsing file that can be downloaded to the payphone.

PAL: Acronym for Public Access Line.

Parallel Printer: A printer that accepts characters eight bits at a time. A parallel printer connects to line printer ports LPT1, LPT2, or LPT3 on an IBM-compatible personal computer.

Path: The route DOS uses to locate a specific file or directory. A full pathname includes the drive designation and root and any sub-directory names. The root directory location is identified by the first letter and each additional sub-directory name is delimited with a backslash (\). For example, C\PNMPLUS refers to the sub-directory of PNM Plus of the root directory on drive C.

Payphone Hierarchy: The payphone information is arranged in a hierarchy containing six items: Payphones, Site, Contract, Customer, Route, and Technician. The hierarchical arrangement of these is as follows, Payphones are located at a Site, Sites are covered under a Contract, Contracts are defined for a Customer. In addition, Sites are grouped into a Route, and each Route is serviced by a Technician.

PBX: Abbreviation for Private Branch Exchange, a telephone switching system usually located on the owner's premises. PBX encompasses a wide variety of equipment that can provide intra-premises telephone service as well as access to public telephone networks.

PCM: Abbreviation for Payphone Control Module. In the Elcotel smart payphone, it is the circuit board assembly that contains the microprocessor, EPROM, EEPROM, RAM and other electronic elements.

Permissive Dialing: Refers to temporarily allowing use of both the "original" and "split" NPA in dialing patterns during a "permissive" period when an NPA is split.

PGM File: A file containing the payphone operating system software. The PGM file can be downloaded to the phone when new features are added.

Phone ANI: This is the 10 digit telephone number assigned to the payphone. Even though the phone may be located in a local calling area, enter the full 10 digit number here Once the phone has been added to the database, this number becomes "read-only" and cannot be changed. In the event of an NPA split or other requirement for the phone ANI to be changed, other processes can be invoked.

Phone Cashbox Seal Number: A ten (10) character seal identifier of the cashbox installed in a payphone. Maintaining this value requires procedures the same as those for the Cashbox Serial number.

Phone Cashbox Serial Number: A ten (10) character serial number of the cashbox installed in a given payphone. The maintenance of this number is up to the user, and requires procedures to be in place to record the number of each replacement cashbox during cashbox collections.

Phone Housing Lower Key: A ten (10) character identifier of the key that fits the payphone housing lower half.

Phone Housing Upper Key: A ten (10) character identifier of the key that fits the payphone housing upper half.

Phone ID: A four (4) digit identifier for the payphone. Must be numeric, and should be unique.

Phone Install Date: Date the payphone was installed. This date may vary from user to user to represent the date the phone was physically erected at a site or the date the first contact with the phone was established by polling, or some other criteria.

Phone Location: Location at the site where the phone is placed. For example, if the site is *BP Station,* then the location might be *Inside, Outside, Pedestal, Drive-Up, Left, Center,* or *Right.* The location does *not* refer to the site name, but instead indicates where on the site's property the payphone can be found.

Phone Macros: A set of commands to be executed in sequence. In a smart payphone, a dialing macro establishes how and when to send digits to the CO for processing for each call type.

Phone Model: This is the Elcotel model designation for the payphone. This can be set at the time a phone is first added to the database. Once set, the phone model cannot be changed without deleting and re-entering the payphone.

Phone Password: An eight (8) character password for access to the payphone.

Phone Program Version: Version of the software downloaded to the payphone. This data is read directly from the payphone during communications sessions with the phone.

Phone ROM version: Version of the chip set in the payphone. This value is read directly from the payphone during communications for program versions 5.3.1 and higher.

Phone Serial Number: Serial number of the payphone according to user requirements. This most often is the serial number of the board in the case.

Phone Service Desk: If you select Yes to the Service Desk question, you must enter the number the payphone user dials when he or she has a problem. This is most commonly 211, which is the default set up in the program for you. You may enter some other value, if needed. You must also enter the number the payphone dials when a user calls up the Service Desk function. This will be a number where someone answers to help the user with their problem.

Phone User-Defined Variables: Three data items of user-defined information may be entered for each payphone. The titles associated with these three data items can be set in the System Configuration section of the program.

PIC: Acronym for Preferred Inter-Exchange Carrier, a term used to identify the owner-operator's preference of an IXC.

PNM: Abbreviation for Payphone Network Manager, a family of Elcotel payphone network management programs, which can be used by an owner-operator to control and maintain communications with phones. These programs can be run from an IBM-compatible computer with a variety of available modems.

Polarity: Related to the direction of the current in the TELCO circuit. Some payphone equipment is polarity sensitive; that is, the Tip and Ring must be correctly identified and wired for the equipment to function.

Polled Problems: This list displays all reported problems that took place while polling the phone(s). The ANI, contacted Time, cashbox amount, cash change, call change, reason for call termination, duration of call in minutes and the alarms reported by the phone are provided.

Polling: The process of calling a phone, or a group of phones, from a personal computer, using the PNM programs.

Polling List: A list of payphones to be polled.

Port: An interface device connecting a computer and another component such as a printer or modem. For example, a printer cable is plugged into the printer port on the computer.

Posting Date: Enter the date you wish to use to "mark" the resulting value for the commission calculation. Posting Dates will default to the date you are performing the commission calculation. However, the posting date usually is the last date of the date range you are calculating, for instance, if the date range is July 1st through July 31st, the posting date could be the 31st.

PPF File: The Priority Parsing file that can be downloaded to the phone to "fine tune" the phones Call Type Tables. Older Elcotel payphones.

Premium Period: The period of time when a telephone call is charged at the full rate, as opposed to the "discount period."

Primary PNM Plus Database: A database on which all payphone network configuration management is done. This database also contains all polling information from all phones in the network. Reports intended to capture data from the entire network are run on this database. Polling is not recommended from this database.

Primary SMDR Database: The SMDR database used to store SMDR data for the entire system.

Priority Parsing: A payphone feature that enables the owner-operator to identify calls based on the digits dialed. Each of the user-dialed digit patterns identified for priority parsing can have the rates, LATA type, dialing macro, completion timer specified.

PROM: Acronym for Programmable Read-Only Memory, a ROM that contains a program "burned in" at the factory. It cannot be reprogrammed like an EPROM or EEPROM memory chip.

Prompt: The way DOS or other program indicates to the user that it is waiting for a command or response. The typical DOS prompt looks like C\>. Also refers to the digitized voice phrases a smart payphone uses to communicate with a user.

Protocol: A required or agreed upon sequence of interaction. In telephony, the required interaction to place a call. In modem communications, the required interaction to establish a telecommunications session and exchange data.

Pulse Dialing: Also known as rotary dialing, the dialing mechanism breaks the current loop, and the number of pulses per second that this occurs is equivalent to the digit dialed. This is one method of sending the number to the CO.

R94 File: Rate file for payphone series 94.

RAM: Acronym for Random Access Memory, the working memory or temporary storage area in PC's and smart payphones. Data stored in RAM, without battery backup, is lost if power is removed.

RAM Reload command: Causes the backup data stored in EEPROM chip to be loaded into Random Access Memory for use by the payphone operating system.

RBOC: Acronym for Regional Bell Operating Company.

Record: A set of one or more consecutive data on a related subject. For example a payphone master record consists of an ID number, a phone number, location name, location description, and so on.

Register: A place in computer memory for storing a value that is used by a payphone feature. A unique three-digit number identifies each register.

Registers and Options: A Register is a place in computer memory for storing a value that is used by a payphone feature. A unique three-digit number identifies each register. An Option is a program switch that enables or disables a payphone feature depending on whether the option is set to ON or OFF, respectively.

Registers and Options Current Value: The column labeled Current Value is the present database content for the register or option displayed.

Rejector Mechanism: A device that accepts genuine coins and rejects others which do not meet the requirements for size, weight, and conformity.

Remote: Usually refers to a location away from the main computer in a network. Remote systems are connected to the main computer by communication channels. Remote terminals are located at a distance from the main computer. Remote data from a payphone in the network can be imported to the PC by using PNM Plus. However, with smart payphones, activity performed through the keypad at the payphone site is referred to as local, for example, local voice telemetry.

Repertory Dialer: A feature that allows the payphone user to speed dial certain phone numbers or adjust some phone settings (i.e. volume, language, etc.). Only available on the KX-5502 Payphone model type.

Reverse Battery Answer Supervision (RBAS): A method of signaling the central office that the called telephone has been answered (gone off-hook). The voltage of the line at the originating end is reversed. This signal starts the billing for the connected call.

Ring: The second wire in the TELCO pair. Normally, the red wire in the pair of wires that makes the talking circuit in the TELCO line. Named for being connected through the outer or "ring" portion of a manual telephone patchboard plug. Also, the signaling of an incoming call by a telephone through a "ringer" device. (Sometimes referred to as "one ringy dingy".)

RMF File: The payphones Rate Module File. The RMF file contains all of a site's NPAs, NXXs, and rates. A RMF file must always be downloaded to the payphone.

ROF (R94) File: The payphone Registers & Options file. This file contains the registers and options settings that determine the payphone feature configuration.

ROM: Read-Only Memory is non-volatile semiconductor memory with predefined data content that cannot be deleted or changed by stored-program instructions because they are "hard-wired" into the computer.

Route: A route typically consists of a number of sites that are geographically close together. Routes are defined to assist in managing the payphones for maintenance or collection purposes, sites are grouped into routes.

S94 File: Speed dial file. This file, containing "quick access" telephone numbers can be downloaded to the payphone. The user can access them by entering * [two digits].

Secondary Dial Tone: Dial tone sometimes restored by the Central Office after called-party hang up but without a hookswitch transition (on-hook or off-hook) by the calling phone.

Secondary PNM Plus Database: A database that may be used to collect polling information, which will subsequently be moved to the primary PNM Plus database. No configuration management tasks will be performed on this database.

Secondary SMDR Database: An SMDR database used to temporarily store SMDR data acquired while polling using a secondary PNM Plus database. The SMDR data associated with this database will be moved to the primary SMDR database at the same time the data from its associated secondary PNM Plus database is moved into the primary PNM Plus database.

Serial Printer: A printer that accepts characters one bit at a time. A serial printer connects to communication ports COM1 or COM2 on IBM PCs.

Setting Alarms to Report during Incoming Call: Indicate with check marks those alarms that you want the phone to respond to by calling home. Some alarms also contain a threshold value that must be met before the alarm triggers. Refer to Elcotel documentation for the payphone, if necessary, for guidance in setting the appropriate values if you do not want to use the defaults provided.

Setting Phone for Incoming Calls: If you allow the phone to accept incoming calls, set the number of rings before the phone answers.

Setting Phone For Incoming Dial: Enter the 7 to 11 digit number for the payphone to dial when reporting alarm data. This number is a string of consecutive digits with no embedded edit symbols such as parentheses or hyphens. If the phone is local to the home base, just enter a 7 digit call home number, or else enter the full dial string required to complete the long distance call from the phone to your location.

Setting Polling Time Window: If you allow the phone to accept incoming calls and set the rings before answer to a typical high number, such as 5, you will encounter unnecessary delays in waiting for phones to answer during nightly polling. This feature allows you to designate a window of time during which you will poll the phone and it should answer on the first ring so you do not have long wait times. Enter the time-of-day expressed as an hour 00-23 for the window to start, and the number of hours the window should exist.

Setting up the No. Digits for Incoming Phone calls: Choose either 7 or 11 as the number of digits the payphone must dial to reach your PNM Plus Operator Console.

SIT: Acronym for Special Information Tone, a three-tone sequence preceding a TELCO interrupt message, such as "This call cannot be completed as dialed."

Site: A physical location where payphones are installed. There may be one or more phones installed at a site.

Site Name: Name of the site where the payphone is located. If no specific site has been identified for a phone, the default site "Unassigned Site" will be set by the program. To set the site name, pull down the list of available sites and select the appropriate one.

Site Specific Block: A collection of data, unique to each payphone, copied from the payphone master record in PNM and downloaded to the payphone.

Site User-Defined Variables: The titles of the three Site User Variables defined in the System Configuration section of the program. For each site, the values associated with each title can be entered in the three blocks.

Smart Mode: A mode of payphone operation for B-1 COCOT line applications in which the payphone is configured to use its internal capability to handle call rating, routing, and answer supervision. Rate table maintenance is required for this mode of operation.

SMDR: Abbreviation for Station Message Detail Records, which are call data detailing the number dialed, date, time, duration of the call, price, credit card information, and so on. SMDR are stored and uploaded for viewing and evaluation. SMDR are sometimes called "Call Detail Records" (CDR).

Software: A program or set of instructions that tells the microprocessor in a computer or smart payphone what to do.

SPD File: Old version of the Speed Dial file. This format will not work with PNM Plus. Refer to S94 files.

TCU: Abbreviation for Touch Call Unit, the assembly that includes the keys, keypad, and terminal board used to generate DTMF tones for such purposes as dialing and smart payphone programming.

Technician: Describe the individuals you may employ to collect and or maintain your payphones. They are typically associated to one or more routes.

TELCO: The operating TELephone COmpany.

Time Zone: The offset in hours from your local time where the payphone is located. This information is used during polling the payphone to stay within the polling window you set up.

Tip: The first wire in the TELCO pair. Normally, the green wire in the pair of wires that is the talking circuit of a telephone line. Named for being connected through the center or "tip" of a manual telephone patchboard plug.

Trigger level: In some instances, values in a register can be changed to reflect the owner-operator requirements for setting or "flagging" an alarm condition. For example, the Cash Vault Alarm Trigger is an adjustable dollar amount. When the sum in the cash box exceeds the amount, the alarm is set.

Uploading: The process of transferring data or complete files from a payphone to PNM Plus.

Utilities: A collection of programs in Elcotel Payphone Network Manager that provides user support, for example perform a system check, backup and restore files, and merge databases.

Validation: The process of verifying the legitimacy of a credit card.

Variable: Refers to a value that can be assigned, such as a register or an option setting.

Voice Detection: The ability of the payphone to identify the end of ringback and the beginning of voice answer.

Voice Telemetry: A technique by which the payphone can be programmed by using DTMF tones, that is, by entering a series of digits at a touch keypad. Note that this method is an alternative to communications via modem telemetry.

Work Order: A work order specifies the set of actions to take to resolve a problem with a payphone. Work orders are a useful tool to manage the dispatch of technicians to phone site(s) and maintain a log of their work. Work orders can also be used to review problem handling procedures and to determine frequency of and between repairs.

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