Merlin 1030/3070
<u>Classic Mail</u>
Design Package
For Release 1.6

Site Survey

❏ Record Merlin System Data

Procedure: Record Merlin system information on the Site Survey forms.

Requirements: • Merlin 1030
                • Feature Package 1, 2, 4 or 5
                • Voice Terminal ports 11, 12, 13 and 14 set as ATTENDANT
                • Merlin line ports set for Tone (DTMF) signaling

�֎ **Note:**   Enter this information on pages 6 and 7 of this package. Be sure to note any special telephone services and indicate blocking of Off-Site Message Alert if necessary.

❏ Determine the Classic Mail Mounting Location:

Procedure: Decide where to mount the Classic Mail.

Requirements: The Classic Mail is generally wall-mounted within five feet of the Merlin Control Unit. Custom cables can be made for Telephone Emulation and Interposed connections if the Classic Mail must be mounted more than five feet from the Merlin Control Unit.

✤ **Note:**   The Classic Mail requires an area 19" X 18" for mounting. Describe the mounting location on page 7 of this package.

❏ Confirm Telephone Emulation Connections

Procedure: Confirm that Merlin Voice Terminal ports 11, 12, 13 and 14 are available to use for Telephone Emulation.

Requirements: The Classic Mail is must be connected to the Merlin Control Unit using Voice Terminal ports 11, 12, 13 and 14. Four Voice Terminal ports are required.

✤ **Note:**   Voice Terminal ports 11,12,13 and 14 must be set to ATTENDANT. For an explanation of Telephone Emulation, see page 18 of this package.

❑ Determine Voice Mail Access Lines

Procedure: Decide which Merlin line ports to use for internal voice mail access.

Requirements: The Classic Mail is must be connected to the Merlin Control Unit using line ports to provide internal users with voice mail access. Up to four access lines can be established for internal access. Voice mail access should be dedicated by connecting vacant line ports to Classic Mail interpose jacks 1 - 4. If there are no vacant line jacks available, voice mail access may be provided on a time-share basis by interposing the existing telephone lines with the Classic Mail.

✳ **Note:** **If possible, always dedicate voice mail access using vacant line ports on the Merlin Control Unit.** If voice mail access is provided by time-sharing the existing telephone lines, connect the least busy telephone lines to the Classic Mail. Enter this information on page 7 of this package. For an explanation of Interposed voice mail access, see page 19 through 21 of this package.

❑ Record Voice Terminal/Mailbox Data

Procedure: Record the intercom number, mailbox number, telephone type, directory name spelling and Voice Terminal programmed buttons for each mailbox owner. Script the primary and alternate greetings on the back of the Voice Terminal/Mailbox Data Sheet. If Off-Site Message Alert is required, enter the dialing sequence for pagers or off-site telephones.

✳ **Note:** Copy page 8 of this package for each mailbox user.

❑ Determine Voice Mail Access Code

Procedure: Determine if the Merlin telephone lines are connected to single-line ports of a PBX or to Centrex lines.

Requirements The default access code is the star key. You may need to change the Classic Mail access code to prevent unwanted effects such as last-number-redial or hook-flash when a user is accessing the Classic Mail on an interposed line.

✳ **Note:** Enter this information on page 9 of this package. If the Merlin Control Unit is not installed on Centrex lines or behind a PBX write "star" in the space provided.

❑ Determine the Need for a Touch-Tone Gate

Procedure: The Touch-Tone Gate may be used to enhance messaging for callers with rotary dial telephones. When this feature is activated the Classic Mail, after answering , will wait for three seconds to receive any DTMF signal. If this signal is not received within three seconds, the Classic Mail will transfer the caller to the designated Attendant's Intercom number. If the Touch-Tone gate is activated, the Company Greeting must be recorded with instructions to "press any key" if the caller has a Touch-Tone telephone.

✳ **Note:** Enter yes or no on page 9 of this package.

❏ Determine Administrator's Mailbox Number

Procedure: The administrator's functions must be assigned to a mailbox. This designation is assigned to the first mailbox that is set up on the Classic Mail. The administrator's function may be subsequently transferred to another mailbox as required.

✳ **Note:** Enter this information on page 9 of this package.

❏ Decide who will be the Attendant.

Procedure: Determine who will be responsible for answering calls coming into the business.

Requirements: When the Classic Mail answers a call, it can offer the caller the option of transferring to an attendant. If there is a single individual responsible for answering incoming calls, use that person's Intercom number as the Attendant's Intercom. When a caller presses 0, the Classic Mail will transfer the caller to the Intercom you have designated as the Attendant. If there is no one solely responsible for answering incoming calls, the Classic Mail can be configured without a designated Attendant's Intercom.

✳ **Note:** Enter this information on page 9 of this package. If there is no attendant write "none" in the space provided.

❏ General Delivery Mailbox

Procedure: If required, the general delivery mailbox function can be assigned to any mailbox or may be disabled entirely.

✳ **Note:** If no one is responsible for reviewing and forwarding messages sent to this mailbox it is very important that this function be disabled. Enter this information on page 9 of this package. If this feature is not required, write "none" in the space provided.

❏ Assign Group Call Distribution Mailboxes

Procedure: Calls into Group Call Distribution intercom numbers (850 - 855) may be routed to a single mailbox.

Requirements: The Merlin Control Unit must have Feature Package 5

✳ **Note:** Enter this information on page 9 of this package.

❏ Complete Business Hour Schedule

Procedure: Determine the opening and closing hour and minute for each day of the week.

Requirements: This feature must be configured before the Classic Mail can automatically switch between Day and Night operational modes. As shipped, the Classic Mail will operate in day mode only.

✳ **Note:** Enter this information on page 9 of this package.

❑ Determine the Rings Before Answering Incoming Calls

Procedure: Determine how long the Classic Mail should wait before answering incoming calls.

Requirements: The Business Hour Schedule must be properly configured before the Classic Mail will automatically switch between day and night rings before answering an incoming call. The default for day mode operation is four rings and one ring for night mode operation. The Classic Mail can be configured not to answer in either operational mode by setting Rings-Before-Answer to 99 rings. If any line must operate differently from the other incoming lines, Rings-Before-Answer can be defined for any individual line.

�֍ **Note:**   Enter the number of rings before the Classic Mail answers calls during day and night operation on page 9 of this package. For any line that must answer in a given number of rings at all times, enter the Rings-Before-Answer for that line.

❑ Determine the Rings Before Picking Up a Transferred Call

Procedure: Determine how long the Classic Mail will wait before reconnecting with a caller.

Requirements: After the Classic Mail transfers a call to an intercom, it will wait from one to nine rings before informing the caller that person is not available. The caller may then leave a message, transfer to another intercom or to the attendant. The default is four rings.

✖ **Note:**   Enter this information on page 9 of this package.

❑ Determine the Call Transfer Type

Procedure: Select either direct or announced transfer method.

Requirements: The Classic Mail can either transfer a call directly to an Intercom or announce over the intercom speaker that a call is waiting on a specified line.

✖ **Note:**   Enter this on page 9 of the Classic Mail Design Package.

❑ Script the Company Greetings

Procedure: Write down what will be recorded for the day and night company greetings. If call routing is required, only use the company name for these greetings. All additional information is recorded in the Call Routing Top-Level Menu prompts for day and night operation.

✖ **Note:**   Enter this information on page 10 of this package. If the Touch-Tone Gate is being used, add this information to the script.

❏ Complete Call Routing Worksheets

Procedure: Use the Call Routing worksheets to document the call routing design.

Requirements: Each telephone key 1 through 9 may be defined with one of three functions: 1) Play an informational message. 2) Transfer to an intercom or 3) Leave a message in a mailbox It is recommended that choices be limited to 3 or 4 keys to reduce confusion. A top-level menu prompt <u>must</u> be recorded to inform callers of the choices available.

✤ **Note:** Complete the Call Routing worksheets for day and night operation on pages 11 through 14 of this package . The Top-Level Menu should inform callers of the available choices in addition to the standard auto attendant features: Transfer to an extension, Transfer to the attendant and the Company Directory. Any mailbox used for Call Routing <u>must</u> be set up with a password and a greeting before it can be specified in a route definition.

❏ Complete Mailbox Assignment Worksheet

Procedure: List all mailbox owners on the Mailbox Assignment Sheets

Requirements: Regular mailbox numbers are the same as the owner's intercom number. Any mailbox owner that doesn't have exclusive use of a Merlin telephone should be assigned a guest mailbox. Guest mailboxes are numbered from 900 to 999.

✤ **Note:** Enter this information on pages 15 through 17 of this package.

Site Survey

General Information

Company _____

Street _____

City _____ State _____

Zip _____ Phone (___) _____

Contact _____

Installing Technician _____

Merlin System Information

Merlin Model: _1030/3070_   Feature Modules: ❏ 1 ❏ 2 ❏ 4 ❏ 5

Automatic Route Selection: ❏ Yes   ❏ No   ✳ **If yes, attach SMDR Data**

Square: ❏   Pooled - Dial Access: ❏   Pooled - Button Access: ❏

Power Requirements: 110 Volts A/C ❏ Ground Test: Pass ❏   Fail ❏   (Installers Only)

Merlin 1030/3070	Line Connections	Line Pools	Block OSA	Merlin 1030/3070	Line Connections	Line Pools	Block OSA
Telephone Number	Line Jack	Pool #	✔	Telephone Number	Line Jack	Pool #	✔
	A0 (1)		❏		**D0** (16)		❏
	A1 (2)		❏		**D1** (17)		❏
	A2 (3)		❏		**D2** (18)		❏
	A3 (4)		❏		**D3** (19)		❏
	A4 (5)		❏		**D4** (20)		❏
	B0 (6)		❏		**E0** (21)		❏
	B1 (7)		❏		**E1** (22)		❏
	B2 (8)		❏		**E2** (23)		❏
	B3 (9)		❏		**E3** (24)		❏
	B4 (10)		❏		**E4** (25)		❏
	C0 (11)		❏		**F0** (26)		❏
	C1 (12)		❏		**F1** (27)		❏
	C2 (13)		❏		**F2** (28)		❏
	C3 (14)		❏		**F3** (29)		❏
	C4 (15)		❏		**F4** (30)		❏

Merlin 1030/3070 Voice Terminal Connections

Intercom	Occupied	Vacant	Intercom	Occupied	Vacant	Intercom	Occupied	Vacant
10	❏	❏	35	❏	❏	60	❏	❏
11	TE-1	❏	36	❏	❏	61	❏	❏
12	TE-2	❏	37	❏	❏	62	❏	❏
13	TE-3	❏	38	❏	❏	63	❏	❏
14	TE-4	❏	39	❏	❏	64	❏	❏
15	❏	❏	40	❏	❏	65	❏	❏
16	❏	❏	41	❏	❏	66	❏	❏
17	❏	❏	42	❏	❏	67	❏	❏
18	❏	❏	43	❏	❏	68	❏	❏
19	❏	❏	44	❏	❏	69	❏	❏
20	❏	❏	45	❏	❏	70	❏	❏
21	❏	❏	46	❏	❏	71	❏	❏
22	❏	❏	47	❏	❏	72	❏	❏
23	❏	❏	48	❏	❏	73	❏	❏
24	❏	❏	49	❏	❏	74	❏	❏
25	❏	❏	50	❏	❏	75	❏	❏
26	❏	❏	51	❏	❏	76	❏	❏
27	❏	❏	52	❏	❏	77	❏	❏
28	❏	❏	53	❏	❏			
29	❏	❏	54	❏	❏			
30	❏	❏	55	❏	❏			
31	❏	❏	56	❏	❏			
32	❏	❏	57	❏	❏			
33	❏	❏	58	❏	❏			
34	❏	❏	59	❏	❏			

Voice Mail Access Connections

Telephone Number	Classic Mail Outside Line Jack	Classic Mail Interpose Jack	Merlin Line Jack	Voice Mail Access Pool
	1	1		
	2	2		
	3	3		
	4	4		

✻ Administrator's Mailbox/Password: _____ Administration Password: _____

Describe the location for mounting the Classic Mail: _____

_____

_____

Voice Terminal/Mailbox Data Sheet
(Copy this page for each mailbox)

5 Button　　**10 Button**　　**22 Button**　　**34 Button**

User Name:_____　Intercom #:_____

Type:_____

Name Spelling

Mailbox #: _____　　　　Regular ❏　　　　Guest ❏

Off-Site Message Alert - Dialing Sequence: _____

� Note: Script mailbox owner's primary and alternate personal greetings on the back of this sheet

Merlin 1030/3070
Classic Mail
Application Design

Access Code Required:	▲ 6 - 1	(star)	Group Call Mailbox #1	▲ 5 - 9	GCD #850
Rings Before Answer - Transfers	▲ 6 - 2	1 - 9	Group Call Mailbox #2	▲ 5 - 9	GCD #851
Touch-Tone Gate:	▲ 6 - 9	Yes/No	Group Call Mailbox #3	▲ 5 - 9	GCD #852
Administrator's Mailbox #:	▲ 5 - 5	1st MB	Group Call Mailbox #4	▲ 5 - 9	GCD #853
Attendant's Intercom #:	▲ 5 - 6	1st MB	Group Call Mailbox #5	▲ 5 - 9	GCD #854
General Delivery Mailbox #:	▲ 5 - 7	1st MB	Group Call Mailbox #6	▲ 5 - 9	GCD #855

Business Hour Schedule ▲ 5 - 2

	Monday	*Tuesday*	*Wednesday*	*Thursday*	*Friday*	*Saturday*	*Sunday*
Open							
Closed							

Rings Before Answering Incoming Calls ▲ 5 - 1

Day Mode	Night Mode
1 - 99	1 - 99

Line 1	Line 2	Line 3	Line 4	Line 5	Line 6	Line 7	Line 8	Line 9	Line 10
1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99

Line 11	Line 12	Line 13	Line 14	Line 15	Line 16	Line 17	Line 18	Line 19	Line 20
1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99

Line 21	Line 22	Line 23	Line 24	Line 25	Line 26	Line 27	Line 28	Line 29	Line 30
1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99	1 - 99

�֍ **Note:** Entering rings before answer for any single line will cause that line to ignore the Business Hour Table and <u>always</u> answer on the rings defined for that line.

<u>Classic Mail Transfer Method</u> ▲ 6 - 7

Direct: ❑

Announced: ❑

Company Greetings

Day Greeting: ▲ 1 - 1

�֍ **Note:** Record Auto Attendant and Call Routing information in Day Top-Level Menu - ▲ **2** - **3**

"Thank you for calling [Company Name]..."

�֍   Touch-Tone Gate: *"If you are calling from a Touch-Tone telephone, press any key now. Other wise,*

remain on the line and your call will be transfered to the attendant."

_____

_____

_____

_____

_____

_____

_____

Night Greeting: ▲ 1 - 2

�֍ **Note:** Record Auto Attendant and Call Routing information in Night Top-Level Menu - ▲ **2** - **1** - **3**

"Thank you for calling [Company Name]. Our business hours are [business hours]..."

�֍   Touch-Tone Gate: *"If you are calling from a Touch-Tone telephone, press any key now. Other wise,*

remain on the line to leave a message in the General Delivery Mailbox."

_____

_____

_____

_____

_____

_____

Call Routing Worksheet
Day Operation

Company Greeting: "Thank you for calling [YOUR COMPANY NAME]." ▲ **1** - **1**

Top-Level Menu: ▲ **2** - **3**

Script the Top-Level Menu of instructions in the space below:

"For sales, press 7. For service, press 8 ...."

_____

_____

_____

_____

_____

_____

_____

Key Routes: ▲ **2** - **2**

Select the action that will take place for each key used in the call routing map.

Day
Selector Code Key #_____

❑ **Hear a Message** (Announcement Only)
Message Script: _____

_____

_____

_____

❑ **Transfer to an Intercom**   Intercom Number: _____
(Extension)   (Extension)

❑ **Leave a Message in a Mailbox**   Mailbox Number: _____
(No Coverage)

�: **Note:** To design additional routes, reproduce this page.

Day

Selector Code Key #_____

❑ **Hear a Message** (Announcement Only)
Message Script:

_____

_____

_____

_____

_____

_____

❑ **Transfer to an Intercom**   Intercom Number: _____
(Extension)   (Extension)

❑ **Leave a Message in a Mailbox** Mailbox Number: _____
(No Coverage)

Day

Selector Code Key #_____

❑ **Hear a Message** (Announcement Only)
Message Script:

_____

_____

_____

_____

_____

_____

❑ **Transfer to an Intercom**   Intercom Number: _____
(Extension)

❑ **Leave a Message in a Mailbox** Mailbox Number: _____
(No Coverage)

Call Routing Worksheet
Night Operation

Company Greeting: "Thank you for calling [YOUR COMPANY NAME]. We are currently closed. Our business hours are [BUSINESS HOURS]." ▲ **1** - **2**

Top-Level Menu: ▲ 2 - 1 - 3

Script the Top-Level Menu of instructions in the space below:

"For sales, press 7. For service, press 8...."

_____

_____

_____

_____

_____

_____

Key Routes: ▲ 2 - 2

Select the action that will take place for each key used in the call routing map.

Night

Selector Code Key #_____

❑ **Hear a Message** (Announcement Only)
Message Script: _____

_____

_____

_____

_____

❑ **Transfer to an Intercom**   Intercom Number: _____
(Extension)

❑ **Leave a Message in a Mailbox**   Mailbox Number: _____
(No Coverage)

✱ **Note:** To design additional routes, reproduce this page.

Night
Selector Code Key #_____

❑ **Hear a Message** (Announcement Only)
Message Script: _____

_____

_____

_____

_____

_____

❑ **Transfer to an Intercom** Intercom Number: _____
(Extension)

❑ **Leave a Message in a Mailbox** Mailbox Number: _____
(No Coverage)

Night
Selector Code Key #_____

❑ **Hear a Message** (Announcement Only)
Message Script: _____

_____

_____

_____

_____

_____

❑ **Transfer to an Intercom** Intercom Number: _____
(Extension)   (Extension)

❑ **Leave a Message in a Mailbox** Mailbox Number: _____
(No Coverage)

Mailbox Assignment Sheet
▲ 7
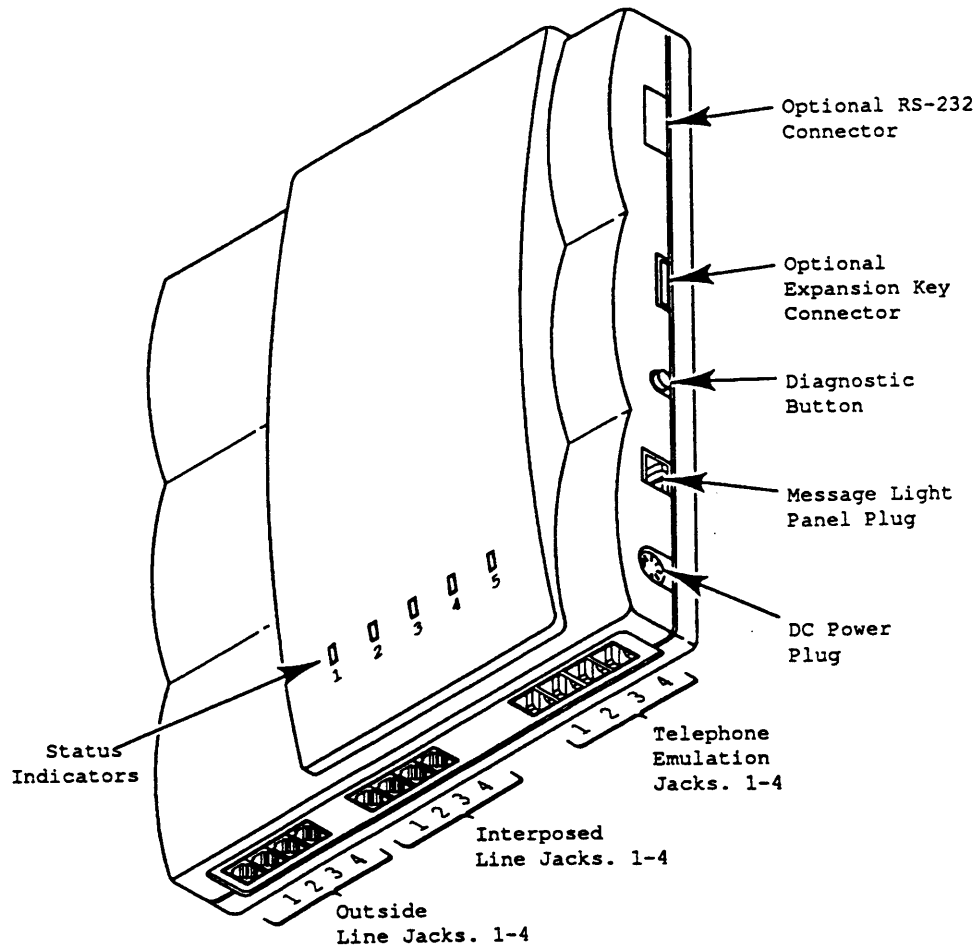
Mailbox Owner	No.	Mailbox Owner	No.
	10		42
	11		43
	12		44
	13		45
	14		46
	15		47
	16		48
	17		49
	18		50
	19		51
	20		52
	21		53
	22		54
	23		55
	24		56
	25		57
	26		58
	27		59
	28		60
	29		61
	30		62
	31		63
	32		64
	33		65
	34		66
	35		67
	36		68
	37		69
	38		70
	39		71
	40		72
	41		73

Mailbox Owner	No.	Mailbox Owner	No.
	74		928
	75		929
	76		930
	77		931
	78		932
	79		933
	900		934
	901		935
	902		936
	903		937
	904		938
	905		939
	906		940
	907		941
	908		942
	909		943
	910		944
	911		945
	912		946
	913		947
	914		948
	915		949
	916		950
	917		951
	918		952
	919		953
	920		954
	921		955
	922		956
	923		957
	924		958
	925		959
	926		960
	927		961

Mailbox Owner	No.	Mailbox Owner	No.
	962		981
	963		982
	964		983
	965		984
	966		985
	967		986
	968		987
	969		988
	970		989
	971		990
	972		991
	973		992
	974		993
	975		994
	976		995
	977		996
	978		997
	979		998
	980		999

Classic Mail
Installation Overview

System Connections:

To understand how the Classic Mail operates it is important to understand the concept of Telephone Emulation and Interposed lines.

Telephone Emulation Jacks:

Each Telephone Emulation jack is connected to the Merlin Control Unit in the same manner as a Merlin Voice Terminal is connected. A Telephone Emulation connection is electronically identical to a Merlin attendant console. The Classic Mail has the ability to use this Telephone Emulation. connection - just as a person would - to answer a call, transfer the call to an intercom and, if needed, record a confidential message in the caller's own words.

Interposed Lines:

Even though Classic Mail Telephone Emulation operates just as a person does when answering calls coming in on outside lines, it can't answer a call from someone calling on a Merlin intercom line. The reason is simple: The Classic Mail interacts with a caller, offering a menu of choices and taking action on the caller's selections. A caller may indicate which menu choices they would like to select by pressing the touch tone key that corresponds with the desired selection. The Classic Mail detects and decodes this touch tone key press and takes the appropriate action. Without the tones, the Classic Mail can't interact with callers and, unfortunately, the Merlin does not generate touch tone on the intercom lines.

So how can a mailbox owner interact with the Classic Mail to send and receive messages? One way is to call in on an outside line. This is exactly what mailbox owners do when they call the Classic Mail from outside the office. But how can they use a Merlin telephone to get their messages? The Classic Mail can be connected to vacant Tel.Co. ports to provide voice mail access. Since Merlin telephones can generate touch tone when connected to a Merlin Tel.Co. line connection, a mailbox owner may access voice mail by selecting any one of up to four Tel.Co. lines that have been **dedicated** to the Classic Mail., If vacant ports are not available to provide dedicated voice mail access, the Classic Mail can be interposed with existing telephone lines to provide voice mail access. By interposing the incoming telephone lines with the Classic Mail, the user can time-share inbound and outbound calls with voice mail access calls. Instead of making a call, the user may select an interposed voice mail access line and signal the Classic Mail that they wish to open a mailbox. Mailbox owners do this by pressing the star button on a Merlin telephone after selecting a voice mail access line. The Classic Mail will recognize this signal and ask the caller for a mailbox number and password before allowing entry into any mailbox. As long as the user is connected to the Classic Mail via the Merlin outside line connection, they can navigate the Classic Mail menus to send and receive messages. Of course, while the mailbox owner is using a time-shared line to interact with the Classic Mail, that line is busy, just as it would be if an outside call was being made. All incoming calls to that line will receive a busy signal. For this reason, dedicated voice mail access is recommended for installations that have vacant Tel.Co. ports available. A combination of dedicated and time-share access may also be used as well.

Other Connections:

Power Plug - connects an external wall-mounted power supply.
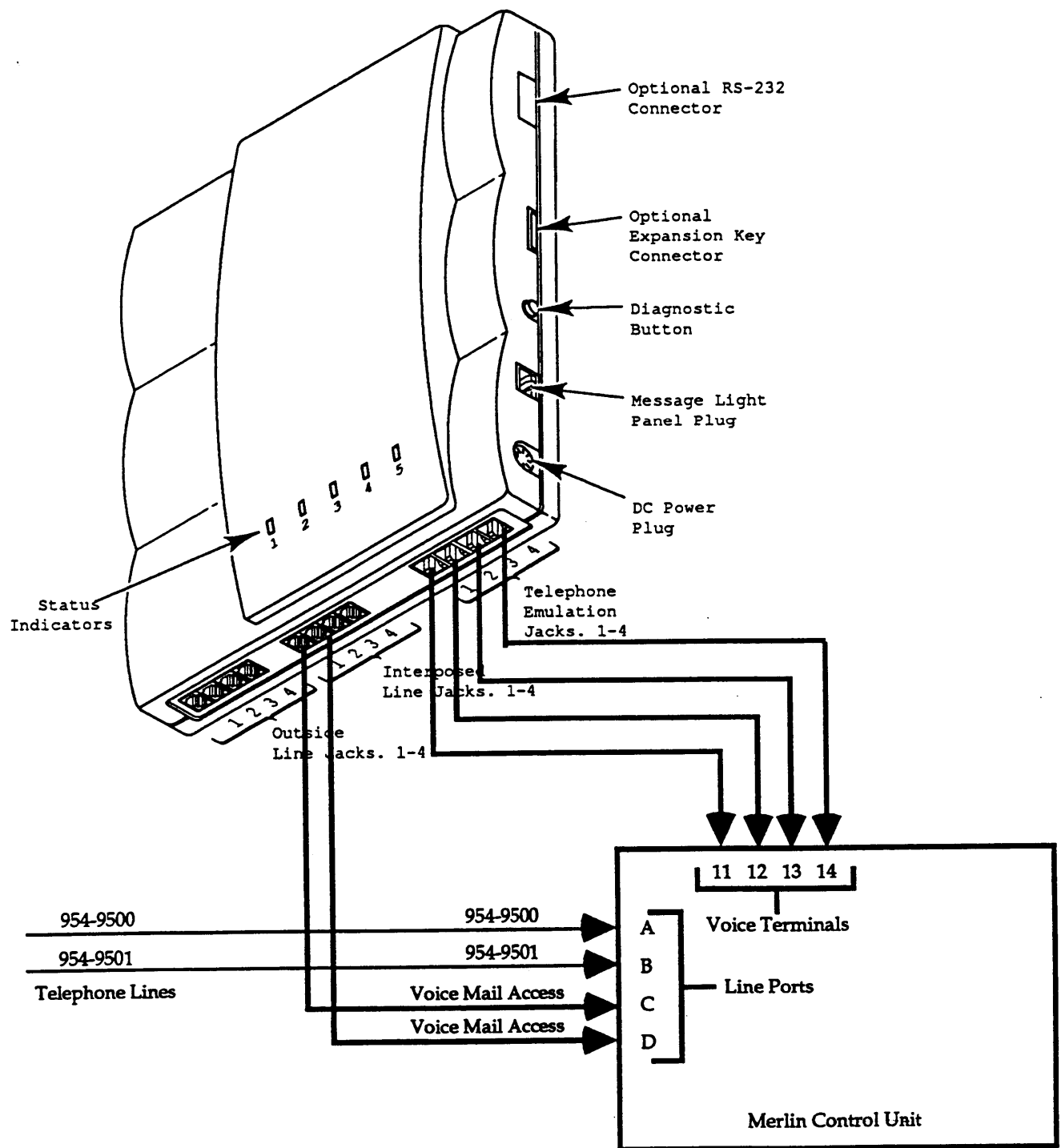
Message Light Panel - connects the optional panel that provides message waiting notification.

Diagnostic Button - used for manufacturing testing only.

Expansion Key Connector - used to upgrade to 4 port and 10/30 operation
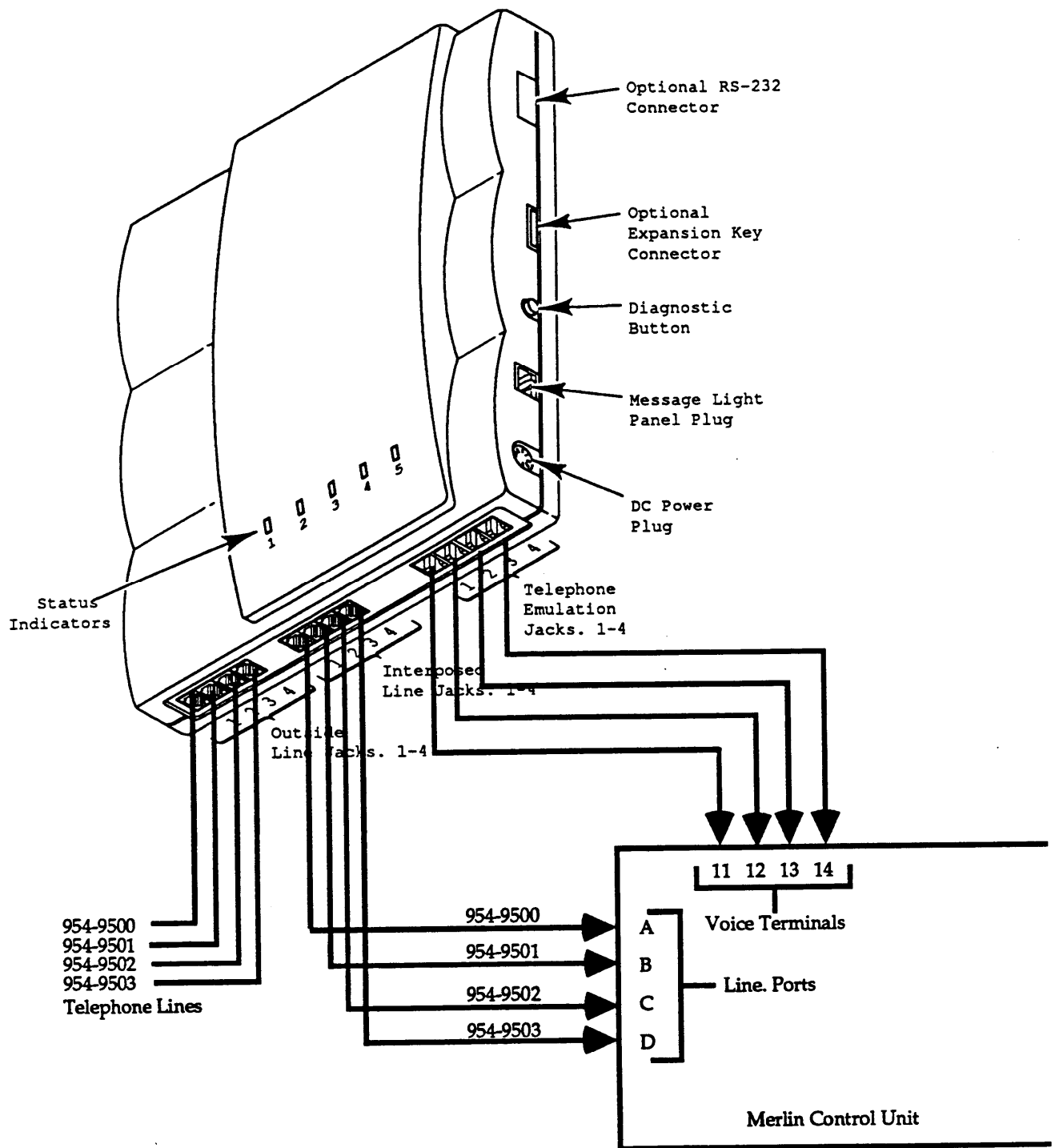
RS-232 - used for manufacturing testing only.

Voice Mail Access Lines

Optional RS-232 Connector

Optional Expansion Key Connector

Diagnostic Button

Message Light Panel Plug

DC Power Plug

Telephone Emulation Jacks. 1-4

Interposed Line Jacks. 1-4

Status Indicators

Outside Line Jacks. 1-4

11 12 13 14

Voice Terminals

954-9500   954-9500   A

954-9501   954-9501   B   Line Ports

Telephone Lines   Voice Mail Access   C

Voice Mail Access   D

Merlin Control Unit

Primary Method - Dedicated Access

The preferred method of providing voice mail access for internal users is to use vacant Tel.Co. ports on the Merlin Unit to dedicate lines for voice mail access. A modular telephone cable is used to connect Classic Mail interposed vacant Tel.Co. ports on the Merlin Control Unit. Mailbox owners can access voice mail by selecting one of these lines pressing the voice mail access key.

Optional RS-232
Connector

Optional
Expansion Key
Connector

Diagnostic
Button

Message Light
Panel Plug

DC Power
Plug

Telephone
Emulation
Jacks. 1-4

Status
Indicators

Interposed
Line Jacks. 1-4

Outside
Line Jacks. 1-4

954-9500
954-9501
954-9502
954-9503
Telephone Lines

954-9500
954-9501
954-9502
954-9503

A
B
C
D

11 12 13 14
Voice Terminals

Line. Ports

Merlin Control Unit

Secondary Method - Time Shared Access

If vacant Tel.Co. ports are not available to provide dedicated voice mail access, existing telephone line an be in
with the Classic Mail to provide time-shared access to voice mail. The mailbox owner selects an interposed line
the voice mail access code. Using this method, voice mail access is time-shared with inbound and outbound calls
busy telephone lines should be used for time-shared voice mail access.