

Merlin 206,410,820 & Plus Classic Mail Design Package 1.6

Site Survey

Record Merlin System Data

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

Requirements:

- Merlin 206, 410, 820
- Merlin Plus release 1 & 2
- 2 - 4 vacant Voice Terminal Jacks
- Merlin Control Unit 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 6 of this package.

Determine Telephone Emulation Connections

Procedure: Decide which Merlin Voice Terminal ports to use for Telephone Emulation.

Requirements: The Classic Mail is must be connected to the Merlin Control Unit using Voice Terminal ports. Two Voice Terminal ports are required for a two-port Classic Mail and four Voice Terminal ports are required for a four-port Classic Mail.

*** Note:** Voice Terminal port #10 (port #0 on Model 206) must be connected to Classic Mail Telephone Emulation jack #1 before the Classic Mail can operate the message lamps. Enter this information on page 7 of this package. For an explanation of Telephone Emulation, see page 17 of this package.

□ Determine Voice Mail Access Lines

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

Requirements: The Classic Mail is must be connected to the Merlin Control Unit using Tel. Co. 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 Tel. Co. ports to Classic Mail interpose jacks 1 - 4. If there are no vacant Tel. Co. 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 Tel.Co. 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 18 of this package.

□ Document 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-dial 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 if Merlin Message Lamps are Required

Procedure: Determine if the Classic Mail is required to operate the message lamps on the Merlin Voice Terminals.

Requirements: This feature is available only if the Merlin Control Unit has Feature Package 2 or is an 820D or 820D2 model. Telephone Emulation jack #1 must be connected to the Merlin attendant port #10 (Port #0 on a Model 206). The attendant port on Merlin 820D2 must be configured with the attendant's template.

*** Note:** Enter this information on page 9 of this package. If message lamps are not required, write "No" in the space provided.

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 an Attendant's Intercom.

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

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.

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.

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 will answer incoming calls during day and night operation on page 9 of this package. For any line, such as those with special telephone services that must answer in a given number of rings at all times, enter the Rings-Before-Answer for that line. Setting the rings before answering for any single line will cause that line to ignore the Business Hour Schedule and always answer on the rings defined for that line. If there are special telephone services on any line, enter this information on page 7 of the Classic Mail Design Package.

□ Determine the Rings Before Picking Up a Transferred Call

Procedure: Determine how long the Classic Mail will wait before reconnecting with a caller after transferring a call to an intercom.

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. For direct transfer, the Merlin must have the transfer feature.

*** 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 must 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 in a Call Routing application must 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 and 16 of this package.

Merlin 206, 410, 820 & Plus Site Survey

Company _____ Contact _____

Street _____

City _____ State _____

Zip _____ Phone () _____

C.I.N _____ Order # _____

Installing Technician _____ Account Exec. _____

Merlin System Information

Merlin Model: _____ Feature Pkg: _____

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

*** Note:** Both the Merlin Control Unit and the Classic Mail should be plugged into the same power source. Requires an area of 19" X 18" for mounting.

Merlin Tel. Co. Connections

Block Off-Site Message Alert

Special Services

Telephone Number	Tel.Co. Jack	Line #	Line #
	A	1 <input type="checkbox"/>	1 <input type="checkbox"/>
	B	2 <input type="checkbox"/>	2 <input type="checkbox"/>
	C	3 <input type="checkbox"/>	3 <input type="checkbox"/>
	D	4 <input type="checkbox"/>	4 <input type="checkbox"/>
	E	5 <input type="checkbox"/>	5 <input type="checkbox"/>
	F	6 <input type="checkbox"/>	6 <input type="checkbox"/>
	G	7 <input type="checkbox"/>	7 <input type="checkbox"/>
	H	8 <input type="checkbox"/>	8 <input type="checkbox"/>

*** Note:** Off-Site Message Alert should only be allowed on local lines.

Describe the mounting location of the Classic Mail unit:

Merlin Voice Terminal Connections

Model 206

Intercom	Occupied	Vacant
0	<input type="checkbox"/>	<input type="checkbox"/>
1	<input type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>	<input type="checkbox"/>

Model 410

Intercom	Occupied	Vacant
10	<input type="checkbox"/>	<input type="checkbox"/>
11	<input type="checkbox"/>	<input type="checkbox"/>
12	<input type="checkbox"/>	<input type="checkbox"/>
13	<input type="checkbox"/>	<input type="checkbox"/>
14	<input type="checkbox"/>	<input type="checkbox"/>
15	<input type="checkbox"/>	<input type="checkbox"/>
16	<input type="checkbox"/>	<input type="checkbox"/>
17	<input type="checkbox"/>	<input type="checkbox"/>
18	<input type="checkbox"/>	<input type="checkbox"/>
19	<input type="checkbox"/>	<input type="checkbox"/>

Model 820 & Merlin Plus

Intercom	Occupied	Vacant
10	<input type="checkbox"/>	<input type="checkbox"/>
11	<input type="checkbox"/>	<input type="checkbox"/>
12	<input type="checkbox"/>	<input type="checkbox"/>
13	<input type="checkbox"/>	<input type="checkbox"/>
14	<input type="checkbox"/>	<input type="checkbox"/>
15	<input type="checkbox"/>	<input type="checkbox"/>
16	<input type="checkbox"/>	<input type="checkbox"/>
17	<input type="checkbox"/>	<input type="checkbox"/>
18	<input type="checkbox"/>	<input type="checkbox"/>
19	<input type="checkbox"/>	<input type="checkbox"/>
20	<input type="checkbox"/>	<input type="checkbox"/>
21	<input type="checkbox"/>	<input type="checkbox"/>
22	<input type="checkbox"/>	<input type="checkbox"/>
23	<input type="checkbox"/>	<input type="checkbox"/>
24	<input type="checkbox"/>	<input type="checkbox"/>
25	<input type="checkbox"/>	<input type="checkbox"/>
26	<input type="checkbox"/>	<input type="checkbox"/>
27	<input type="checkbox"/>	<input type="checkbox"/>
28	<input type="checkbox"/>	<input type="checkbox"/>
29	<input type="checkbox"/>	<input type="checkbox"/>

Administrator's Mailbox:

Password:

Admin. Password:

Telephone Emulation

<u>Classic Mail</u> <u>Telephone Emulation</u>	<u>Merlin Voice</u> <u>Terminal</u> <small>(message lamps - 10)</small>
Jack #1	
Jack #2	
Jack #3	
Jack #4	

Voice Mail Access Lines

<u>Classic Mail</u> <u>Outside Lines</u>	<u>Classic Mail</u> <u>Interposed Lines</u>	<u>Merlin</u> <u>Tel.Co. Lines</u>
Jack #1	Jack #1	
Jack #2	Jack #2	
Jack #3	Jack #3	
Jack #4	Jack #4	

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 206,410,820 & Plus Classic Mail Application Design

Access Code Required:	▲ 6 - 1	(star)
Touch-Tone Gate:	▲ 6 - 9	Yes/No
Administration Level Password:	▲ 5 - 4	0000
Administrator's Mailbox Number:	▲ 5 - 5	1st MB
Attendant's Intercom Number:	▲ 5 - 6	1st MB
General Delivery Mailbox Number:	▲ 5 - 7	1st MB
Message Lamps Required:	Yes/No	

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	Line 1	Line 2	Line 3	Line 4	Line 5	Line 6	Line 7	Line 8
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 always answer on the rings defined for that line. See the Site Survey for information on lines with special telephone services.

Rings Before Answering a Transferred Call: ▲ 6 - 2	1 - 9
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Classic Mail Transfer Method

▲ 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 transferred 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** (Extension) Intercom Number: _____
(Extension) (Extension)

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

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

Day

Selector Code Key # _____

- Hear a Message** (Announcement Only)

Message Script:

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

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

Day

Selector Code Key # _____

- Hear a Message** (Announcement Only)

Message Script:

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

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

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** (Extension) Intercom Number: _____

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

Night

Selector Code Key # _____

- Hear a Message** (Announcement Only)

Message Script:

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

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

Mailbox Assignment Sheet

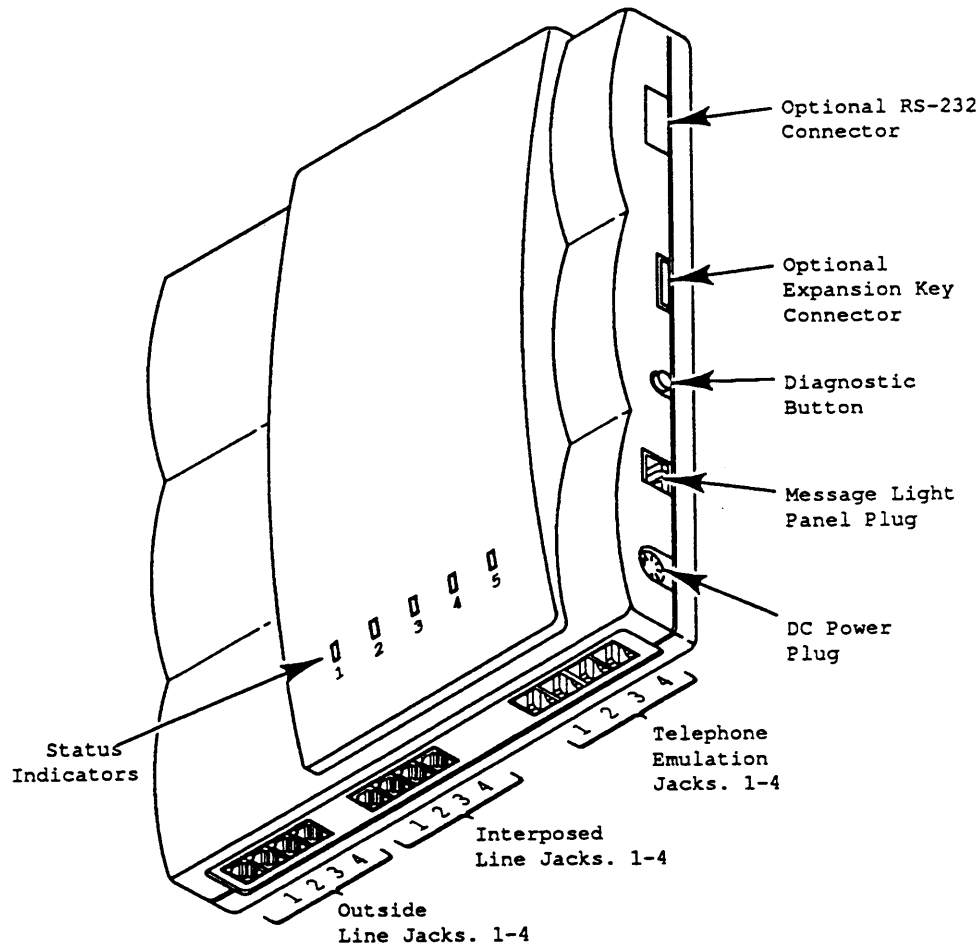
▲ 7

Mailbox Owner	No.	Mailbox Owner	No.
	10 (1)		910
	11 (2)		911
	12 (3)		912
	13 (4)		913
	14 (5)		914
	15		915
	16		916
	17		917
	18		918
	19		919
	20		920
	21		921
	22		922
	23		923
	24		924
	25		925
	26		926
	27		927
	28		928
	29		929
	900		930
	901		931
	902		932
	903		933
	904		934
	905		935
	906		936
	907		937
	908		938
	909		939

Mailbox Owner	No.	Mailbox Owner	No.
	940		970
	941		971
	942		972
	943		973
	944		974
	945		975
	946		976
	947		977
	948		978
	949		979
	950		980
	951		981
	952		982
	953		983
	954		984
	955		985
	956		986
	957		987
	958		988
	959		989
	960		990
	961		991
	962		932
	963		993
	964		994
	965		995
	966		996
	967		997
	968		998
	969		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.

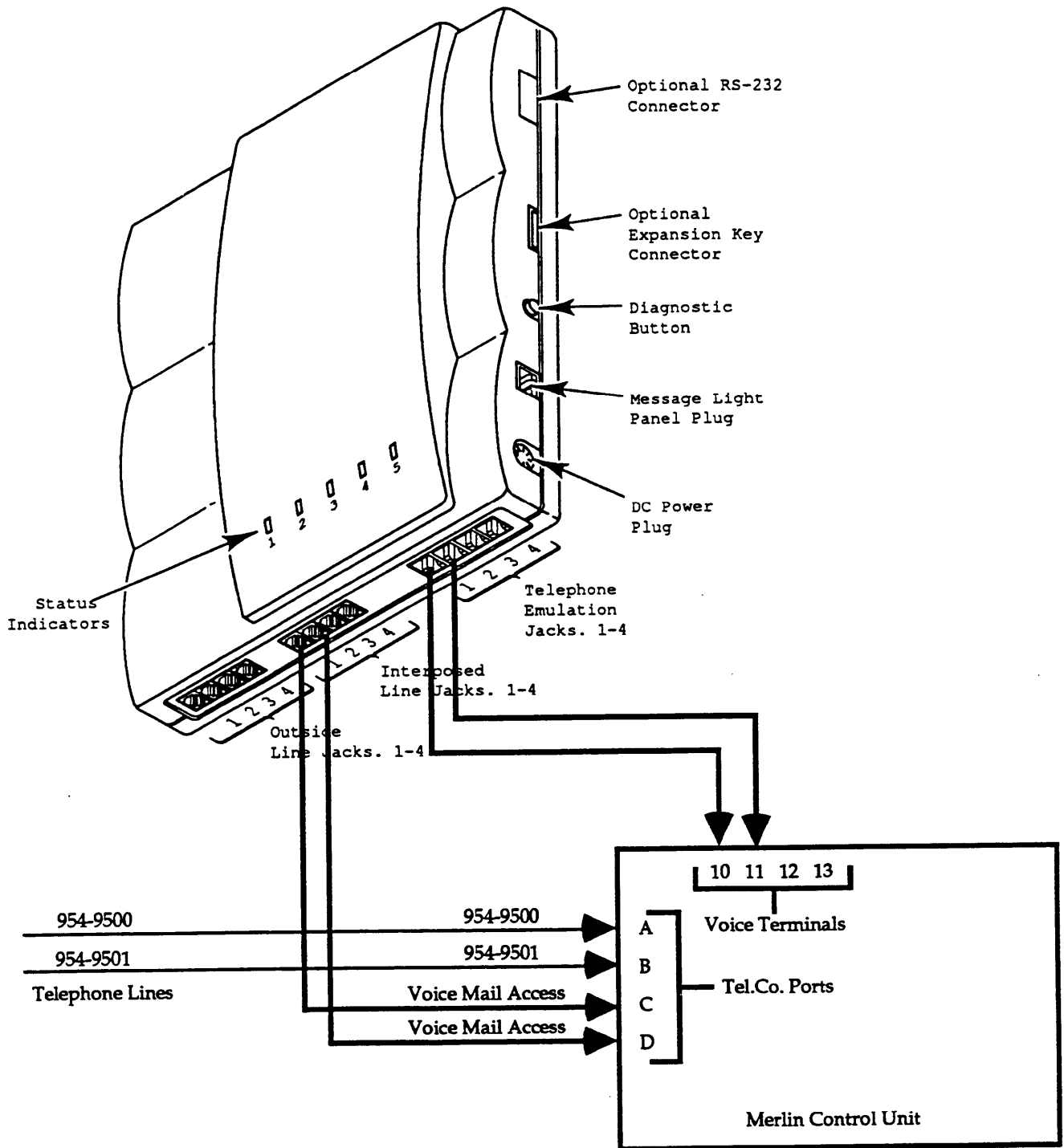
Message Light Panel - connects the optional panel that provides message waiting notification.

Diagnostic Button - used for manufacturing testing only.

Expansion Key Connector - used to upgrade to 4 port and 10/30 operation.

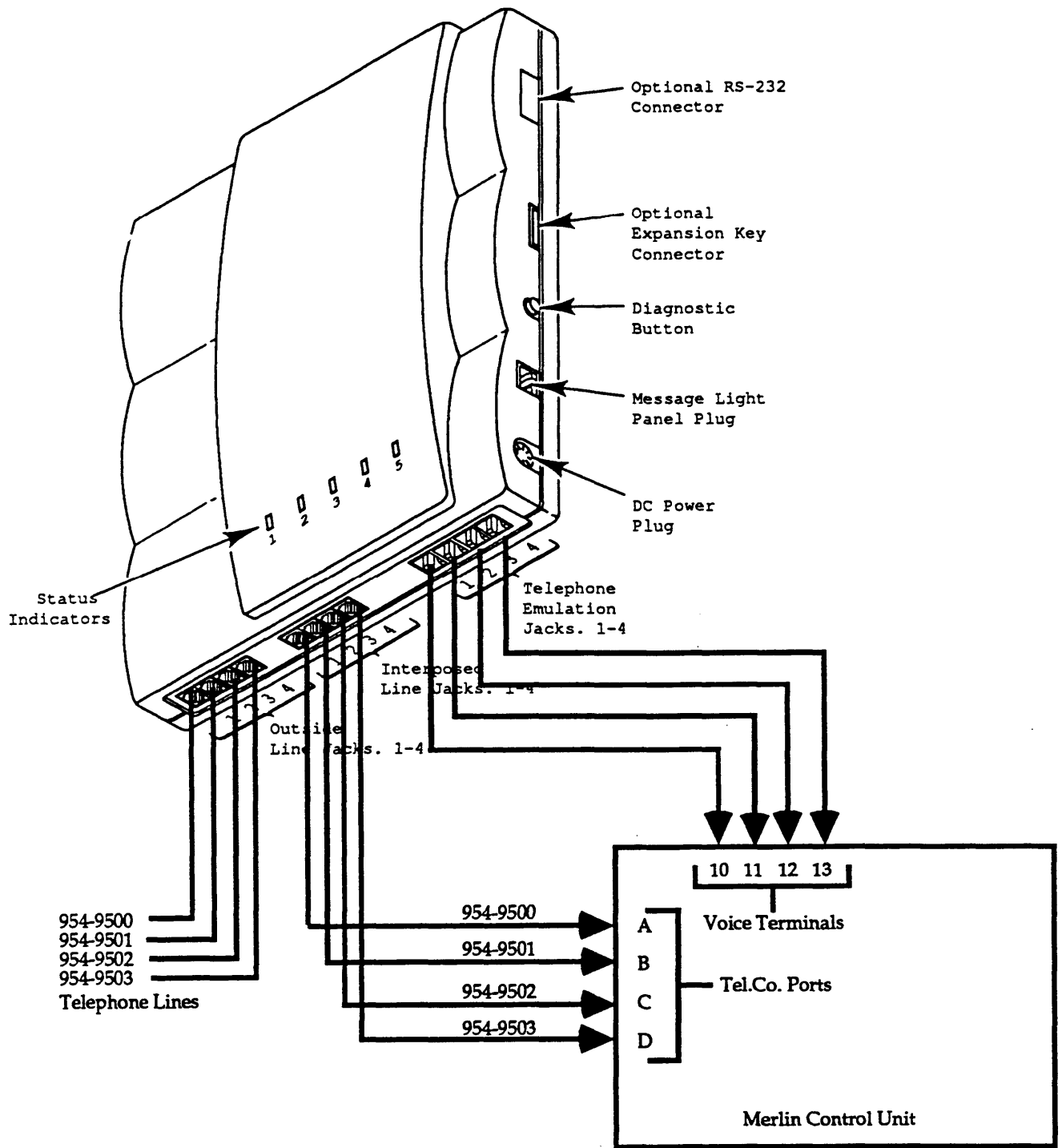
RS-232 - used for manufacturing testing only.

Voice Mail Access Lines



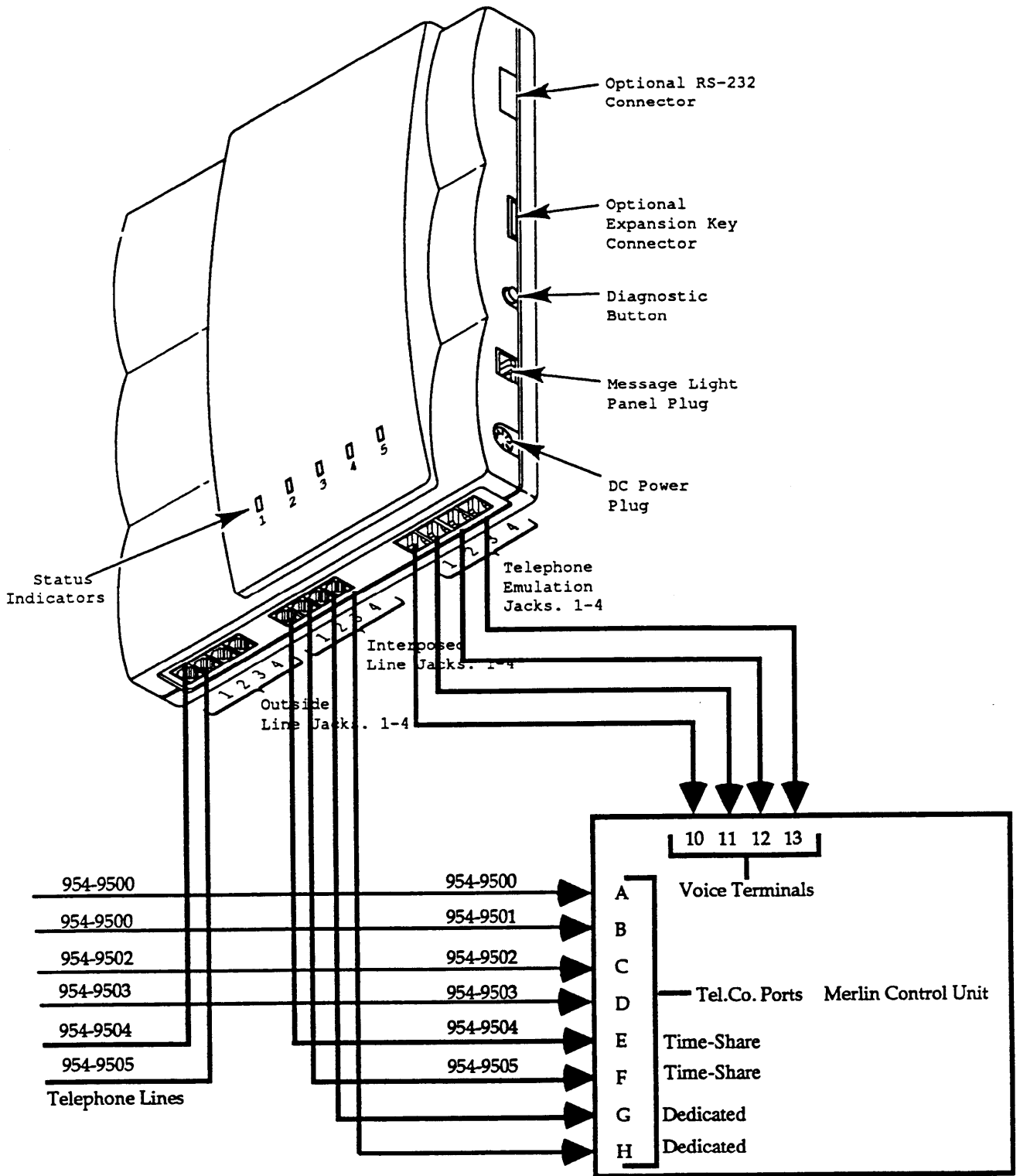
Primary Method - Dedicated Access

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



Secondary Method - Time Shared Access

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



Hybrid Method - Dedicated/Time-Shared Access

A combination of dedicated and time-shared voice mail access may be used to maximize system performance by using available vacant Tel.Co. ports for dedicated access in addition to interposed connection to provide the maximum number of voice mail access connections. Vacant Tel.Co. ports are used first followed by interposing the least busy telephone lines.