# PNM Plus

## Compact Desk Guide

PN 3350320C Nov, 99

# PNM Plus
## Compact Desk Guide



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**-Notice-**
Elcotel, Inc. reserves the right to make any changes and improvements in the product described in this document at any time and without prior notice.



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# Introduction

## Audience Description

This manual assumes that the reader has read *PNM Plus Operation Manual* (P/N 3350231) and is using this book as a quick reference guide.

## Applicability

This manual applies to PNM Plus versions 2.1.0 and higher.

## Purpose

This manual is intended to provide step-by step instructions for completing frequently used PNM Plus functions.

## Related Publications

*PNM Plus Operation Manual*, P/N 3350231

## Contacting Elcotel

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

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Toll Free: 800-ELCOTEL (800-352-6835)
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# 1. GETTING STARTED

## 1.1 Installing PNM Plus

Installation involves using a CD that loads the following components:

- Operator Console
- Reports
- Poll Manager
- Utilities
- PNM Plus Database
- 32-Bit Reports (Optional)
- Multiple Database Manger (Optional)

***Note**: The **READ ME FILE** may contain late breaking information about the PNM Plus product.*

**CAUTION**: Before you begin, close all open applications.

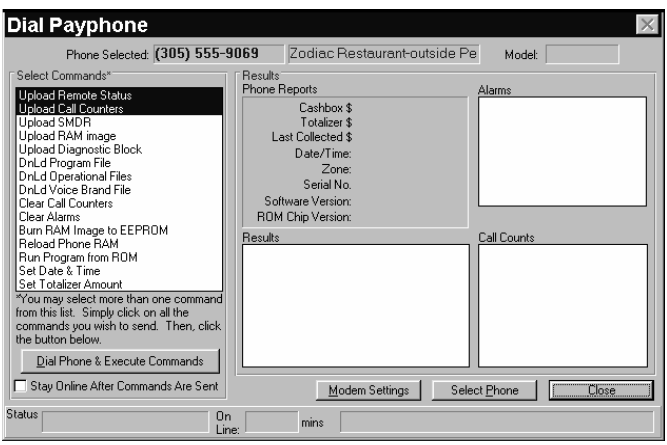
| | | |
|---|---|---|
| **1** | Insert CD into appropriate drive. | |
| **2** | Select **START -> RUN,** then enter **D:\Setup.exe** (use the appropriate drive letter). | |
| **3** | Complete the **WELCOME** screen and click on **NEXT** to begin the setup. | |
| **4** | Complete the **USER INFORMATION** screen. | You can find the serial number of the CDROM case. |

| | | |
|---|---|---|
| **5** | Continue following the screen prompts until the installation is complete. | It is important that you view the **READ ME NOTES** File. This is where any possible late breaking information about the PNM Plus product will be located. |

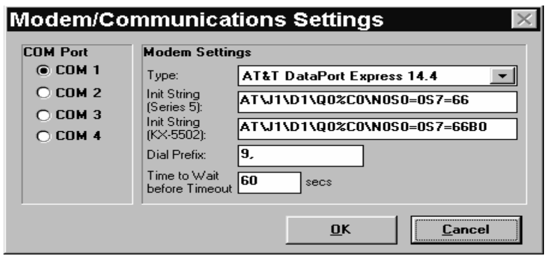
## 1.2 Configuring a Modem from Operator Console

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click on the **DIAL A PAYPHONE** icon at the PNM Plus toolbar. | The **DIAL PAYPHONE** Screen appears. |



| | | |
|---|---|---|
| **2** | Click **MODEM SETTINGS**. | The **MODEM/ COMMUNICATIONS SETTINGS** screen appears. |




| | | |
|---|---|---|
| **3** | Click on the **COMMUNICATIONS PORT** button (1, 2, 3, or 4) you want to use. | |
| **4** | Select the modem type from the **TYPE** drop down list. | Select **CUSTOM** if your modem is not on the list. |
| **5** | In the **SERIES 5 INIT STRING** field, enter the initialization string for the modem used on your Series 5 phones.<br><br>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. |

| | | |
|---|---|---|
| **6** | 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. |
| **7** | 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. |
| **8** | Click on **OK**. | PNM Plus returns the **DIAL PAYPHONE** screen. |

## 1.3 Setting General System Options

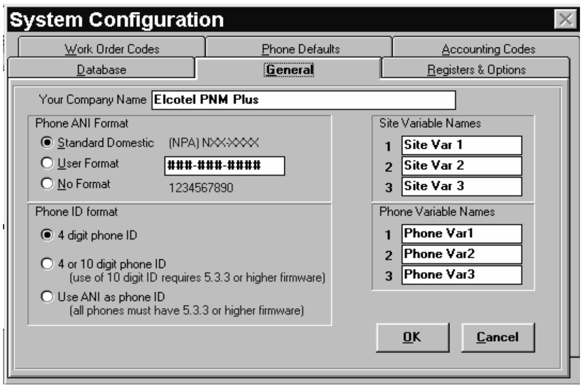
By setting your system options, you save time and simplify the process of adding new phones to your database.

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click on **10**. | The **SYSTEM CONFIGURATION** screen appears. |

**3** Click the **GENERAL** tab.

The **GENERAL** fields appear.




**4** Select a Phone ANI format from the **PHONE ANI FORMAT** box.

You must specify a 10-digit number.

**STANDARD FORMAT** = (NPA) NXX-XXXX.

**USER FORMAT** allows dashes (-) and slashes (/).

**NO FORMAT** has no separators.

**5** In **PHONE ID FORMAT**, select the type of identifier you want PNM Plus to use to identify phones.

| | | |
|---|---|---|
| **6** | In **SITE VARIABLE NAMES**, enter any classifications you want to use to identify a site. You can enter up to three site variables. | These variables allow you to classify groups of sites based on any criteria you need, such as city limits, drug corner, etc.<br><br>These names appear in the **SITE DETAIL** screen. |
| **7** | In **PHONE VARIABLE NAMES**, enter any classifications you want to use to identify a phone. You can enter up to three phone variables. | These variables allow you to classify groups of phones based on any criteria you need, such as case type, booth type, new models, etc.<br><br>These names appear in the **PHONE DETAIL** screen. |
| **8** | Click **OK**. | |

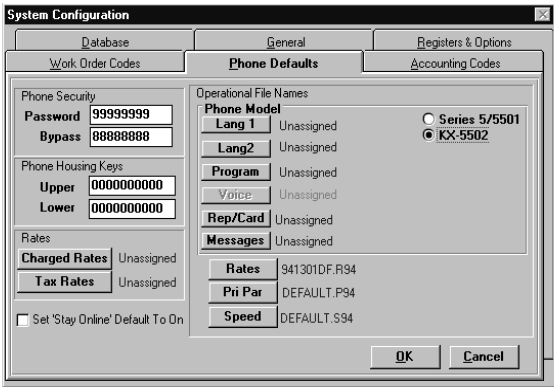
## 1.4 Setting Phone Defaults

The **PHONE DEFAULT** screen allows you to customize the default file selection for any new phone added to your database.

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click on **10**. | The **SYSTEM CONFIGURATION** screen appears. |

| | | |
|---|---|---|
| **3** | Select the **PHONE DEFAULTS** tab. | The **PHONE DEFAULTS** page appears. |




| | | |
|---|---|---|
| **4** | Select a phone model type. | |
| **5** | Enter the field values for security password, security bypass, phone housing upper key, or phone housing lower key. | |
| **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.<br><br>***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.<br><br>If you click on **VOICE, LANGUAGE 1, LANGUAGE 2** or **PROGRAM**, select the default from the drop down list that appears.<br><br>If you click on **REP/CARDS**, select the default from the **KX-5502 REP/CARDS TEMPLATES** screen.<br><br>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. |
| **8** | Click on **OK**. | The phone defaults are set. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. |

# 2. CONFIGURATION FILES

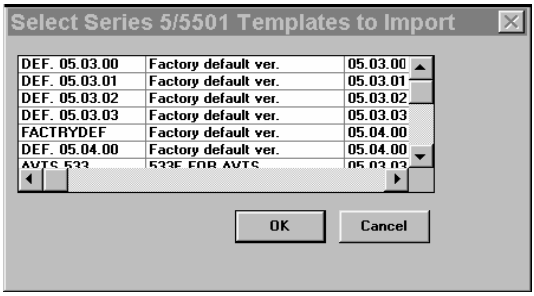
## 2.1 Register and Option Templates

### 2.1.1 IMPORT/EXPORT REGISTER & OPTION TEMPLATES

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click **1.** | The **MANAGE REGISTERS AND OPTIONS TEMPLATE** screen appears. |
| **3** | Select a phone model type. | |
| **4** | Click on the **IMPORT** or **EXPORT** button. | The **IMPORT FROM DATABASE** or **EXPORT FROM DATABASE** screen appears. |
| **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** or **SELECT TEMPLATE TO EXPORT** screen appears. |



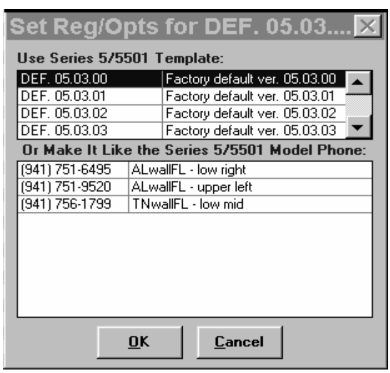

| | | |
|---|---|---|
| **7** | Click on the Template to highlight the selection. | |
| **8** | Click on **OK**. | PNM Plus imports/exports the template to your working database and returns to the **MANAGE REGISTERS AND OPTIONS TEMPLATE** screen. |

## 2.1.2 SETTING REGISTERS & OPTIONS TO MATCH A TEMPLATE

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click **1.** | The **MANAGE REGISTERS AND OPTIONS TEMPLATE** screen appears. |

| | | |
|---|---|---|
| **3** | Select a phone model type. | |
| **4** | Highlight the template you want by clicking on the box to the left of the template. | |
| **5** | Click **CHOOSE**. | The **REGISTERS AND OPTIONS** screen for your specified phone model appears. |
| **6** | Click **SET LIKE**. | The **SET REG/OPT TO BE LIKE** screen for your specified phone model appears. |




| | | |
|---|---|---|
| **7** | Click 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. |

| | | |
|---|---|---|
| 9 | Click on **CLOSE**. | Returns the **MANAGE REGISTERS & OPTIONS TEMPLATES** screen. |
| 10 | Click on **CLOSE**. | Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. |

# 2.2 Rate Files

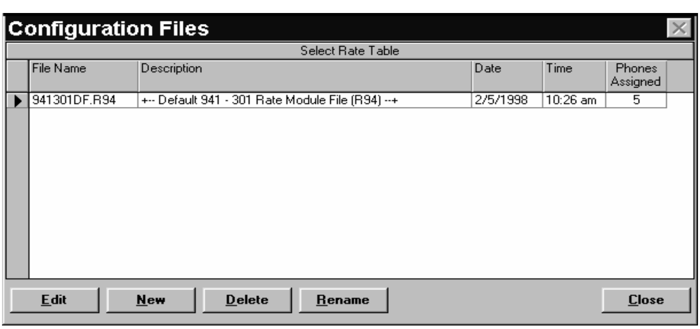
## 2.2.1 OBTAINING RATE FILES

Rate files can be obtained by downloading from the Elcotel Web Site at www.elcotel.com.

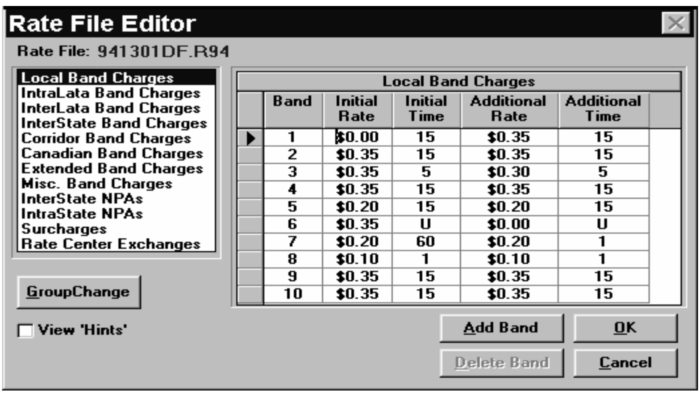
## 2.2.2 VIEWING AND EDITING RATE FILES

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| 1 | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| 2 | Click **2.** | The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. |



| Step | Action | Result |
|---|---|---|
| **3** | Highlight the desired rate file by selecting the box to the left of the file name. | If you want to edit an Elcotel-supplied rate file, we recommend that you first make a copy it and edit the copy. |
| **4** | Click on **EDIT**. | The **RATE FILE EDITOR** screen appears. |



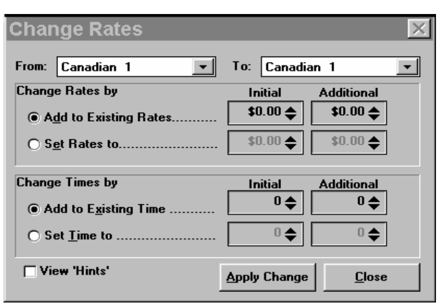

| Step | Action |
|---|---|
| **5** | Select the desired Band Charge category from the **CATEGORY** list box. |
| **6** | In the grid box, select the box to the left of the band you want to modify. |
| **7** | Enter the new values for this band. |
| **8** | Use the preceding steps to modify other Band Charge categories. |

| | | |
|---|---|---|
| 9 | Click on **OK**. | PNM Plus returns the **YELLOW RESOLUTION** screen. |
| 10 | Click the appropriate option. For details on these options, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE** screen **MAIN MENU**. |

## 2.2.3 EDITING RATE FILES USING GROUP CHANGE

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| 1 | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| 2 | Click **2.** | The **CONFIGURATION FILES - SELECT RATE TABLE** screen appears. |
| 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. |
| 5 | Click on **GROUP CHANGE**. | The **CHANGE RATES** screen appears. |



| | | |
|---|---|---|
| **6** | From the **FROM** field drop down list, select the Starting Price Band Category to be modified in the Group Change. | The **FROM** and **TO** fields determine the range of pricing bands affected by group change. |
| **7** | From the **TO** field drop down list, select the Last Price Band Category to be modified in the Group Change. | |
| **8** | In the **CHANGE RATES BY** field, click on the **ADD TO EXISTING RATES** or **SET RATES TO** button. | |
| **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. | |

| | | |
|---|---|---|
| **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.** | PNM Plus changes the values. A dialog box notifies you of the number of price bands affected by the change. |
| **13** | Click **OK**. | |
| **14** | Click **CLOSE**. | PNM Plus returns the **YELLOW RESOLUTION** screen. |
| **15** | Click the appropriate option. For details on these options, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE** screen **MAIN MENU**. |

### 2.2.4 MANAGING RATES GLOBALLY

Use the Global Rate Editor to:

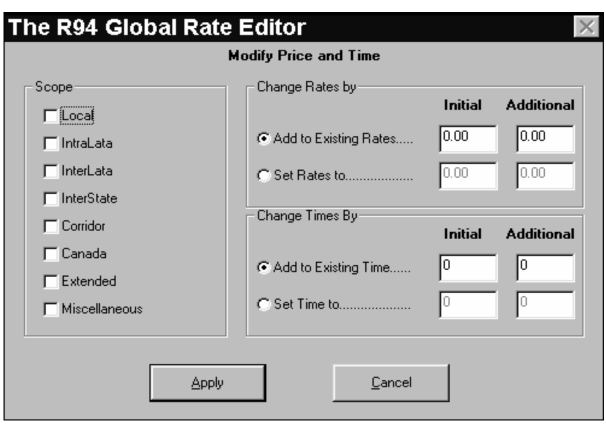
- Modify the initial and additional rate amounts and times.
- Add NXXs to an existing NPA.

***Note**: If you are only adding NXXs to an existing NPA, go directly to Step 11.*

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click **3.** | The **GLOBAL RATE EDITOR** screen appears. |


| | | |
|---|---|---|
| **3** | In the **AVAILABLE FILES** window, double click on a rate to edit. Repeat for each file to edit, or click **ADD ALL.** | The file is copied to the **SELECTED FILES** window. |
| **4** | Click **BANDS**. | The **MODIFY PRICE AND TIME** screen appears. |



| | | |
|---|---|---|
| 5 | At the **SCOPE** window, click on the check box for each band charge category you want to modify. | All bands within a **SCOPE** will be changed identically. |
| 6 | At the **CHANGE RATES BY** window:<br>• Click **ADD TO EXISTING RATES** and enter the amount you want to add to the Initial rate amount and to the Additional rate amount.<br>• Click **SET RATES TO** and enter the Initial and Additional rate amounts. | You can subtract from the existing amounts by entering a negative (-) sign before the amounts. |
| 7 | At the **CHANGE TIMES BY** window:<br>• Click **ADD TO EXISTING TIMES** and enter the amount you want to add to the Initial time and to the Additional time.<br>• Click **SET TIME TO** and enter the Initial and Additional times. | |

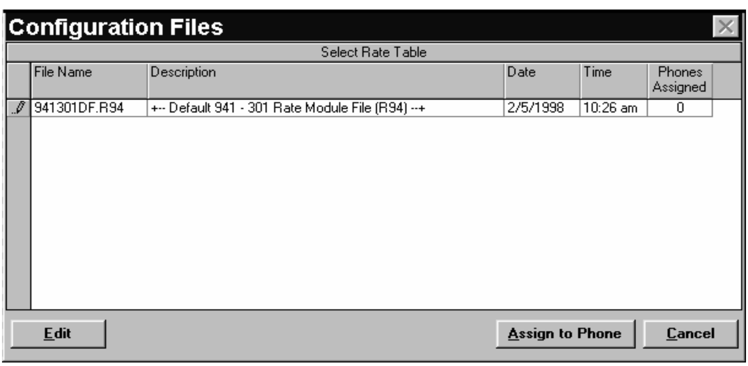
| | | |
|---|---|---|
| **8** | Click **APPLY**. | The **ABOUT TO MODIFY R94S** screen displays the number of rate files and phones that will be affected by the changes you have specified. |
| **9** | Click **CONTINUE.** | PNM Plus makes the changes and returns the **YELLOW RESOLUTION** screen. |
| **10** | Click the appropriate option. For details on these options, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE** screen **MAIN MENU**. |
| **11** | To add NXXs to an NPA, repeat steps 1-3 and click **NXXS**. | The **ACTIVATE NXX** screen appears. |

| | | |
|---|---|---|
| **12** | 1. In the **NPA** field, enter the NPA where you want to add the NXX.<br>2. In the **SISTER NXX** field, enter the existing NXX you want to use as a model for the new NXX.<br>3. In the **NEW NXX** field, enter the new NXX you want to add<br>4. Click **ADD TO LIST**. | |
| **13** | Click **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. |
| **14** | Click **CONTINUE** | PNM Plus makes the changes and returns the **GLOBAL RATE EDITOR**. |
| **15** | Click **CLOSE**. | PNM Plus returns the **YELLOW RESOLUTION** screen. |
| **16** | Click the appropriate option. For details on these options, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE** screen **MAIN MENU**. |

## 2.2.5 ASSIGNING A RATE FILE

From **Operator Console**:

| | | |
|---|---|---|
| **1** | Click the **Payphone Administration** icon. | The **Navigation** screen appears. |
| **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. |
| **3** | Click **Rates**. | The **Configuration Files - Select Rate Table** screen appears |




| | | |
|---|---|---|
| **4** | Click on the box to the left of the file you want. | |
| **5** | Click on **Assign to Phone**. | The rate file is assigned. Returns the **Phone Detail** screen. |

| | | |
|---|---|---|
| 6 | Click on **OK**. | Returns the **NAVIGATION** screen. |
| 7 | Click **CLOSE**. | Returns **OPERATOR CONSOLE**. |

## 2.3 Assigning a Priority Parsing File

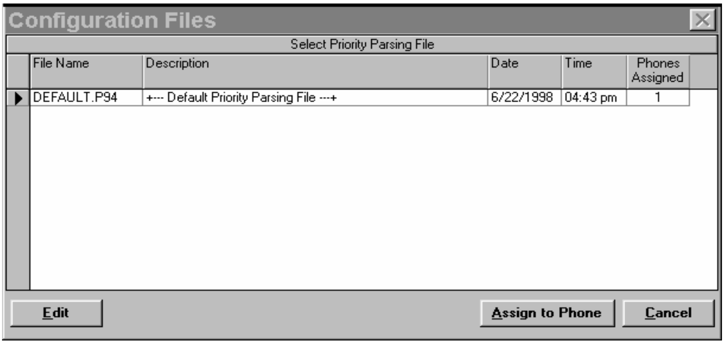
The priority parsing feature is used to:

- Block calls.
- Set pricing for specific calls.
- Route calls.
- Convert digits dialed into other digits.
- Process calls based on specific macros.
- Redial calls.

Refer to your *PNM Plus Operation Manual*, Section 8.5, for information about managing priority parsing functions.

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| 1 | Click the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |
| 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. |
| 3 | Click **PRI PAR**. | The **CONFIGURATION FILES - SELECT PRIORITY PARSING FILE** screen appears |




| | | |
|---|---|---|
| **4** | Click on the box to the left of the file you want. | |
| **5** | Click on **ASSIGN TO PHONE**. | The priority parsing file is assigned. Returns the **PHONE DETAIL** screen. |
| **6** | Click on **OK**. | Returns the **NAVIGATION** screen. |
| **7** | Click **CLOSE**. | Returns **OPERATOR CONSOLE**. |

## 2.4 Assigning a Speed Dial File

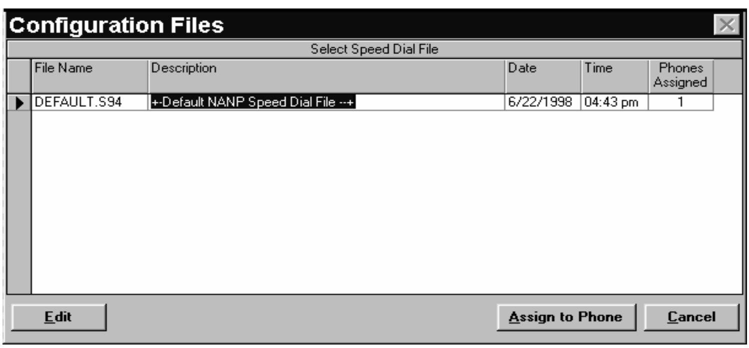
You can assign a Speed Dial file to your phone so the Payphone user can quickly dial out a convenience number (e.g., dial for TAXI service).

Refer to your PNM Plus Operation Manual, Section 8.6, for information on creating and editing Speed Dial files.

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |

| | | |
|---|---|---|
| **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. |
| **3** | Click **SPEED**. | The **CONFIGURATION FILES - SELECT SPEED DIAL FILE** screen appears. |




| | | |
|---|---|---|
| **4** | Click on the box to the left of the file you want. | |
| **5** | Click on **ASSIGN TO PHONE**. | The speed dial file is assigned. Returns the **PHONE DETAIL** screen. |
| **6** | Click on **OK**. | Returns the **NAVIGATION** screen. |
| **7** | Click **CLOSE**. | Returns **OPERATOR CONSOLE**. |

## 2.5 Assigning a Program File

If you need to upgrade your phone to a newer version of software, you can use PNM Plus to write over the existing phone software.

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |
| **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. |
| **3** | To upgrade your phone to a newer version of software, click **PROGRAM**. | Select the software version you want to download from the drop down list. |
| **4** | Click **OK**. | PNM Plus returns the **YELLOW RESOLUTION** screen. |
| **5** | Click the appropriate option. For details on these options, see Section 3.4. | Returns the **NAVIGATION** screen. |
| **6** | Click **CLOSE**. | Returns **OPERATOR CONSOLE.** |

# 2.6 Assigning a Voice File

If you are using Elcotel's PAOF™ (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.*

From **OPERATOR CONSOLE**:

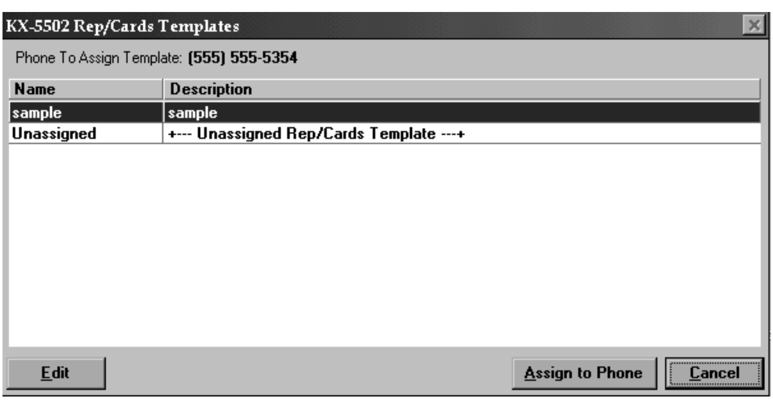
| | | |
|---|---|---|
| 1 | Click the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |
| 2 | After you have entered the phone into the PNM Plus database, double click on the phone from the **PHONES** list box or click on the phone then click **DETAIL**. | The **PHONE DETAIL** screen appears. |
| 3 | Select a phone model type. | The phone model type determines which options are enabled in the **PHONE DETAIL** screen. |
| 4 | Click **VOICE**. | Select the voice file you want from the drop down list. |
| 5 | Click **CLOSE**. | PNM Plus returns the **YELLOW RESOLUTION** screen. |
| 6 | Click the appropriate option. For details on these options, see Section 3.4. | Returns **OPERATOR CONSOLE.** |

## 2.7 Assigning a Rep/Cards 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.

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |
| **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. |
| **3** | Click **REP/CARDS**. | The **KX-5502 REP/CARDS** screen appears. |



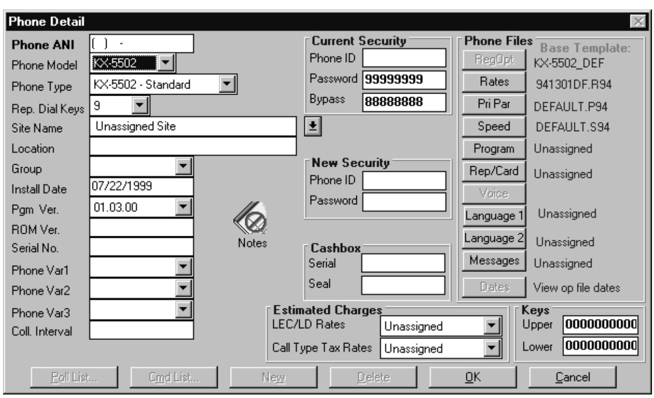
| | | |
|---|---|---|
| **4** | Click on the box to the left of the file you want. | |
| **5** | Click on **ASSIGN TO PHONE**. | The rep/cards file is assigned. Returns the **PHONE DETAIL** screen. |
| **6** | Click on **OK**. | Returns the **NAVIGATION** screen. |
| **7** | Click **CLOSE**. | Returns **OPERATOR CONSOLE**. |

# 3. MANAGING PHONE INFORMATION

## 3.1 Adding a Phone to the Database

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| 1 | Click on the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |
| 2 | Double click on the **PHONE** icon or click on the **PHONE** icon then click on **DETAIL**. | The **PHONE DETAIL** screen appears. |




| | | |
|---|---|---|
| 3 | Click on **NEW**. | |
| 4 | Enter the **PHONE ANI**. | |
| 5 | Select the **PHONE MODEL** type. | |

| | | |
|---|---|---|
| **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.<br>***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**. | PNM Plus uses the **PNM PLUS PASSWORD** when calling the payphone. |
| **9** | Enter the **CURRENT SECURITY BYPASS**. | The Bypass Code is used to enter voice telemetry, either local or remote. |
| **10** | Select the site from the **SITE NAME** field drop down list. | You must first have entered a site in the database and assigned your phone to the site. |
| **11** | Enter the **LOCATION**. | This field is required. |
| **12** | Select the group you want from the **GROUP** field drop down list. | This field is optional. |
| **13** | PNM Plus will automatically enter the **INSTALL DATE, PGM VER, ROM VERSION,** and **SERIAL NO.** | These fields are optional. |
| **14** | These fields are not required, but the data may be useful for your business needs later. | The **KEYS - UPPER** field.<br>The **KEYS - LOWER** field.<br>The **CASHBOX SERIAL** field.<br>The **CASHBOX SEAL** field. |

| | | |
|---|---|---|
| **15** | Click **REGOPT** to set your phone's registers and options. | See Section 2.1.2. |
| **16** | Click **RATES** to assign a rates file to your phone. | See Section 2.2. |
| **17** | Click **PRIPAR** to assign priority parsing files to your phone. | See Section 2.3. |
| **18** | Click **SPEED** to assign speed dial files to your phone. | See Section 2.4. |
| **19** | Click **PROGRAM** to upgrade your phone to a newer version of software. | See Section 2.5. |
| **20** | Click **REP/CARD** to assign a Repertory Dialer or Credit/Debit Card Template. | This feature is not available to Series 5/5501 phones. See Section 2.7. |
| **21** | Click **VOICE** to assign a Voice file. | This feature is not available to KX-5502 phones. See Section 2.6. |
| **22** | Click **LANGUAGE 1** to select an additional language file for downloading. | Refer to your *PNM Plus Operation Manual*, Section 4.3.13, for further information on Language files. |
| **23** | Click **MESSAGES** to assign a scrolling message template. | |

| | | |
|---|---|---|
| **24** | Click on the **LCD/LD RATES** drop down list in the **ESTIMATED CHARGES** field and select a Charged Rates Template. | Refer to your *PNM Plus Operation Manual*, Section 4.3.14, for further information on assigning charged rates templates. |
| **25** | Click on the **CALL TYPE TAX RATES** drop down list in the **ESTIMATED CHARGES** field and select a Tax Rates Template. | Refer to your *PNM Plus Operation Manual*, Section 4.3.15, for further information on assigning tax rates templates. |
| **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 1.3. |
| **27** | Click on **OK**. | PNM Plus adds the phone to the database and returns the **YELLOW RESOLUTION** screen. |
| **28** | Click the appropriate option. For details on these options, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE MAIN MENU**. |

# 3.2 Editing Phone Information

From **OPERATOR CONSOLE**:

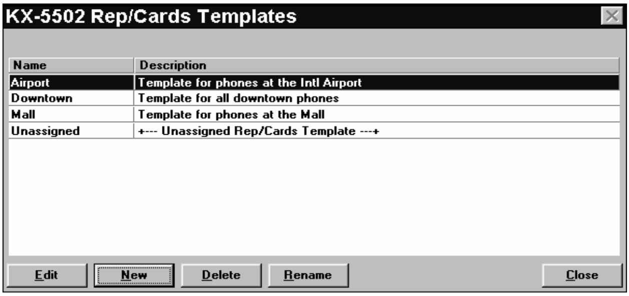
| | | |
|---|---|---|
| **1** | Click on the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |
| **2** | Select the phone you want to edit and then click **DETAIL**. | The **PHONE DETAIL** screen appears. |
| **3** | Select the fields you want to change and enter the new information. | |
| **4** | Click **OK**. | PNM Plus returns the **NAVIGATION** screen. |
| **5** | Click **CLOSE**. | If your changes modify payphone programming, the **YELLOW RESOLUTION** screen appears. |
| **6** | Click the appropriate option. For details, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE MAIN MENU**. |

# 3.3 Using the Rep/Cards Editor

## 3.3.1 CREATING A REP/CARDS TEMPLATE

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click **8.** | The **REP/CARDS TEMPLATE** screen appears. |

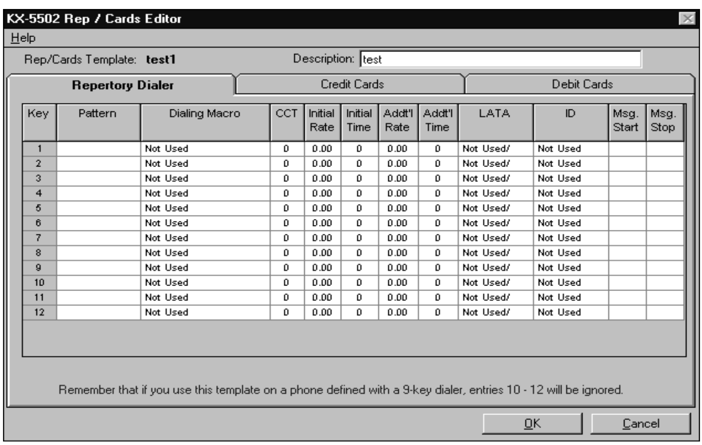



| | | |
|---|---|---|
| **3** | Select the Rep/Cards Template you wish to use as your base template. | |
| **4** | Click **NEW**. | The **NEW TEMPLATE CONFIRMATION** screen appears. |
| **5** | Click **YES**. Enter the name of the new template then click on **OK**. | Your name can be up to 20 characters with spaces and punctuation marks. |
| **6** | Enter the Description of the new template then click **OK**. | Your description can be up to 50 characters with spaces and punctuation marks. |
| **7** | Go to Section 3.3.2, 3.3.3, and 3.3.4 to customize your new template. | |

## 3.3.2 EDITING THE REPERTORY DIALER TABLE

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click **8.** | The **REP/CARDS TEMPLATE** screen appears. |
| **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. |



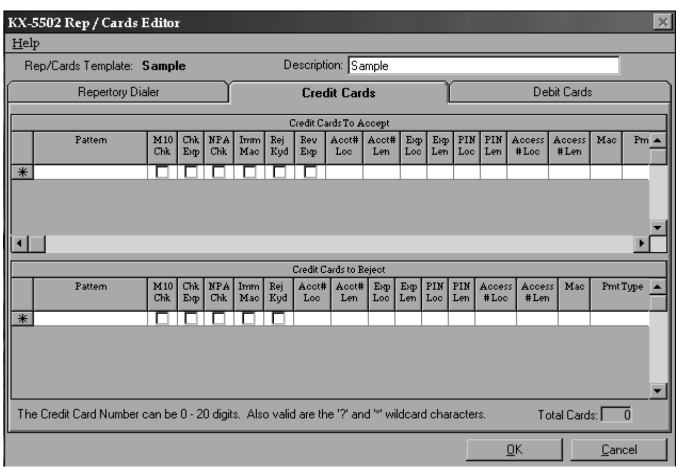
| | | |
|---|---|---|
| **5** | View the numbers from 1-12 in the column on the right under **KEY.** | This is the Key number or the number of the button on your KX-5502 model payphone.<br><br>**Note:** *Depending on your phone model type (Western or Quadrum), you may have 9 or 12 repertory dialer buttons 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. | To use this key as a speed dial button, select **COMPLETE** and continue with step 7.<br><br>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. | The dialing macro assigned to the pattern tells your payphone how to dial specific call types. |
| **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. |

| | | |
|---|---|---|
| **10** | Enter the **INITIAL RATE** and **INITIAL TIME** for the call in the proper columns. | |
| **11** | Enter the **ADDITIONAL RATE** and **ADDITIONAL TIME** for the call in the proper columns. | |
| **12** | Select a **LATA** from the drop down box. | |
| **13** | From the drop down list, select the number of the first instructional message associated with the current key in the **MSG START** field. | |
| **14** | From the drop down list, select the number of the last instructional message for this key in the **MSG STOP** field. | |
| **15** | Click **OK** and follow the on-screen prompts. | If the modified file has been assigned to a phone, the **YELLOW RESOLUTION** screen appears. |
| **16** | Click the appropriate option. For details, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE MAIN MENU**. |

### 3.3.3 EDITING A CREDIT CARD TEMPLATE

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| **2** | Click **8.** | The **REP/CARDS TEMPLATE** screen appears. |
| **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. |
| **5** | Click on the **CREDIT CARDS** tab. | The **KX-5502 REP/CARDS EDITOR** screen appears with the Credit Card tab in front. |



| | | |
|---|---|---|
| **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.*<br><br>Each row is limited to 20 digits. You may use the following wildcards:<br><br>? = any one digit<br><br>* = any following digits |
| **7** | Check **M10 CHK**, if you wish the phone to perform modulo ten. | Refer to Section 8.8.3 in your *PNM Plus Operation Manual* for more information on this option. |
| **8** | Check **CHK EXP**, if you want the expiration date to be checked. | |
| **9** | Check **NPA CHK**, if you wish the phone to check the area code on the calling card. | |
| **10** | Check **IMMED MACRO**, 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 card's magnetic stripe when a value is entered in the **ACCESS# LOC** field. |
| **11** | Check **REJ KYD**, if you want the phone to reject all keyed in card numbers. | |

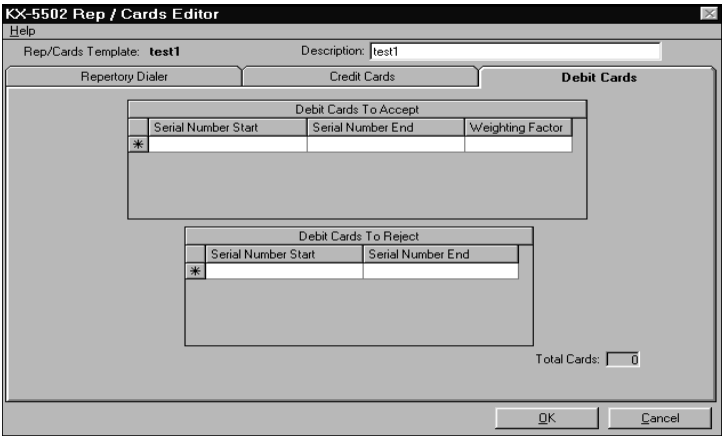
| | | |
|---|---|---|
| **12** | Check the box under **REV EXP** if your OSP requires YYMM format. | This field only applies to KX 1.3 phones. |
| **13** | Enter the location of the account number in the **ACCT# LOC** field. | Refer to Section 8.8.3 in your *PNM Plus Operation Manual* for instruction on number locations and lengths. |
| **14** | Enter the length of the account number in the **ACCT# LEN** field. | |
| **15** | Enter the location of the expiration date in the **EXP LOC** field. | |
| **16** | Enter the length of the expiration date in the **EXP LEN** field. | |
| **17** | Enter the location of the account holder’s personal identification number in the **PIN LOC** field. | |
| **18** | Enter the length of the account holder’s personal identification number in the **PIN LEN** field. | |
| **19** | Enter the location of the access number in the **ACCESS # LOC** field. | |
| **20** | Enter the length of the access number in the **ACCESS # LEN** 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. | |
| **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. | The same wild cards are allowed as in the "Credit Cards to Accept" section.<br>**CREDIT CARD TO REJECT** fields do not include the **REV EXP** check box. |
| **25** | Click on **OK** and follow the on-screen prompts. | If the modified file has been assigned to a phone, the **YELLOW RESOLUTION** screen appears. |
| **26** | Click the appropriate option. For details, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE MAIN MENU**. |

## 3.3.4 EDITING A DEBIT CARD TEMPLATE

From **OPERATOR CONSOLE**:

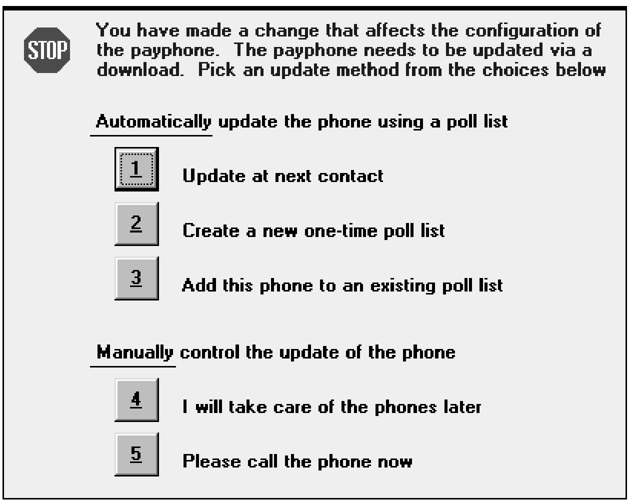
| | | |
|---|---|---|
| 1 | Click the **CONFIGURATION** icon. | The **CONFIGURATION MENU** appears. |
| 2 | Click **8.** | The **REP/CARDS TEMPLATE** screen appears. |
| 3 | Select the Rep/Cards Template you wish to edit. | |
| 4 | Click on **EDIT**. The Repertory Dialer tab is selected on default. | The **KX-5502 REP/CARDS EDITOR** screen appears with the Repertory Dialer tab in front. |
| 5 | Click on the **DEBIT CARDS** tab. | The **KX-5502 REP/CARDS EDITOR** screen appears with the Debit Card tab in front. |



| | | |
|---|---|---|
| **6** | Enter the debit card numbers to accept. | If there are no entries in this section, the payphone will not accept any debit cards.<br><br>You may use the following wildcards:<br><br>? = any one digit<br><br>* = any following digits |
| **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. The value should be between 1 and 16. |
| **8** | Enter the debit card numbers to reject. | You may use the following wildcards:<br><br>? = any one digit<br>* = any following digits |
| **9** | Click on **OK** and follow the on-screen prompts. | If the modified file has been assigned to a phone, the **YELLOW RESOLUTION** screen appears. |
| **10** | Click the appropriate option. For details, see Section 3.4. | PNM Plus returns the **OPERATOR CONSOLE MAIN MENU**. |

# 3.4 Downloading Updated Phone Information

The **YELLOW RESOLUTION** screen appears when a change is made to the payphone configuration.  For the change to take affect, it must be downloaded to the phone.




Select **Update at next contact** to update the next time you contact the phone.  This contact could be the next time the phone calls home, you call the phone using the **DIAL PAYPHONE** screen, or during polling.

Select **Create a new one-time poll list** to create a poll list that PNM Plus uses one time to download the data to the phone.

Select **Add this phone to an existing phone list** if you want to update the phone the next time PNM Plus runs an existing poll list.

To download the new information manually at a later time, select **I will take care of the phone later**.

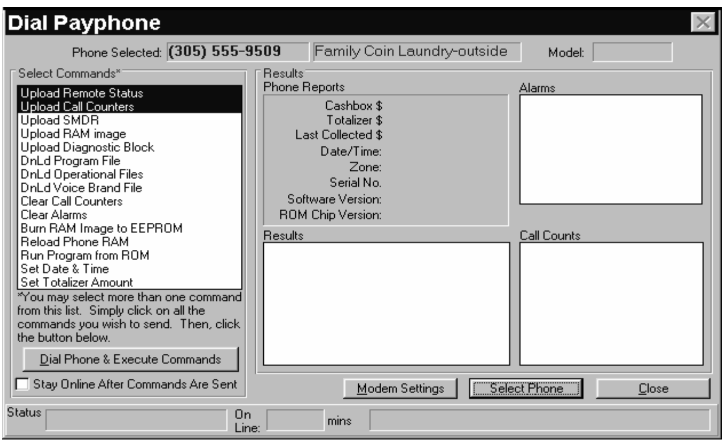
To use the Dial a Payphone feature to download the new information at the present time, select **Please call the phone now**.

# 4. POLLING YOUR PHONES

## 4.1 Dialing a Phone from Operator Console

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click on the **DIAL A PAYPHONE** icon at the PNM Plus toolbar. | The **DIAL PAYPHONE** screen appears. |




| | | |
|---|---|---|
| **2** | To select the phone to call, click **SELECT PHONE**. | The **FIND A PHONE** screen appears. |
| **3** | Enter either the ANI, site name, or phone ID. Click **FIND**. | PNM Plus finds the phone and displays the ANI, site name, and ID. |

| | | |
|---|---|---|
| **4** | Click **CHOOSE**. | PNM Plus returns the **DIAL PAYPHONE** screen and displays the selected phone in the upper left corner. |
| **5** | Select the commands you want to send from the **SELECT COMMANDS** list box. | The top two commands (**UPLOAD REMOTE STATUS** and **UPLOAD CALL COUNTERS**) are always selected. If **DNLD PROGRAM FILE** and **DNLD OPERATIONAL FILES** are selected, **BURN RAM IMAGE TO EEPROM** is also selected. |
| **6** | To start the call, click **DIAL PHONE & EXECUTE COMMANDS**. | The status display shows *connected to phone...* |
| **7** | The **COMMAND RESULTS** list box shows the status of each command selected. | To end the call, click **ABORT CALL**. |

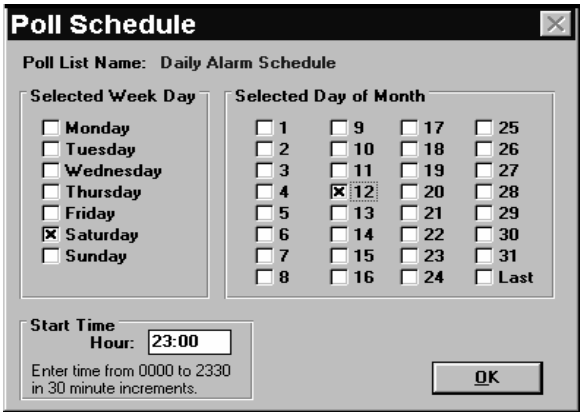
***Note***: *You have the option of checking the* ***STAY ONLINE AFTER COMMANDS ARE SENT*** *box, which allows you to execute additional commands without redialing your payphone. For detailed information about this feature, refer to your* ***PNM Plus Operation Manual***.

## 4.2 Creating a Poll List

From **OPERATOR CONSOLE**:

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


| | | |
|---|---|---|
| **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. |




| | | |
|---|---|---|
| **6** | Select the days the schedule is to run and enter the start time for the poll list, and then click **OK**. | The **POLL LIST COMMANDS** screen appears. |
| **7** | Select the check boxes of the commands to be performed, and then click **OK.** | The **ASSIGN PHONES TO POLL LIST** screen appears. |
| **8** | Assign phones to the Poll List, and then click **OK**. | PNM Plus adds the poll list you just created to the database, and returns the **POLL LIST MAINTENANCE** screen. |
| **9** | Click on **CLOSE**. | |

## 4.3 Adding a Phone to a Poll List

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click on the **PAYPHONE ADMINISTRATION** icon. | The **NAVIGATION** screen appears. |

| | | |
|---|---|---|
| 2 | In the **PHONES** field, double click the phone you want to assign. | The **PHONE DETAIL** screen appears. |
| 3 | Click on **POLL LIST**. | The **ASSIGN POLL LIST** screen appears. |
| 4 | From the **AVAILABLE POLL LISTS** list box, select the poll list you want to assign to your phone. Click **ADD**. | |
| 5 | Click **OK**. | PNM Plus returns the **PHONE DETAIL** screen. |
| 6 | Click **OK**. | PNM Plus returns the **NAVIGATION** screen. |
| 7 | Click **CLOSE**. | PNM Plus returns the **OPERATOR CONSOLE**. |

## 4.4 Activating Poll Manager

To activate your poll lists so they will execute at the proper time, you must activate Poll Manager.

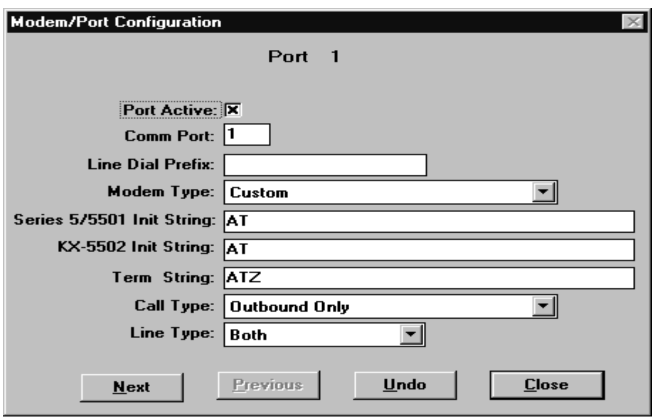
From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| 1 | From the Windows desktop, Select **START - PROGRAMS - PNM PLUS - POLL MANAGER.** | The **POLL MANAGER** screen appears. |
| 2 | To deactivate Poll Manager and turn off polling, select **FILE - EXIT** from the toolbar. | |

# 4.5 Configuring a Modem in Poll Manager

You must activate a communications port and ensure that your modem settings are correct before polling can take place.:

| | | |
|---|---|---|
| 1 | Open **POLL MANAGER**. | The **POLL MANAGER** screen appears. |
| 2 | Select **CONFIGURATION - MODEM SETUP.** | The **MODEM/PORT CONFIGURATION** screen appears. |




| | | |
|---|---|---|
| 3 | 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. |
| 4 | Select the box located to the right of the **PORT ACTIVE** label. | The communications port is activated. |

| | | |
|---|---|---|
| **5** | Enter the Communication port number of your PC's modem in the **COMM PORT** field. | |
| **6** | Enter the line dial prefix in the **LINE DIAL PREFIX** field if your modem is connected to a switching device such as a PBX. | Refer to Section 7.1.2 in your *PNM Plus Operation Manual* for details. |
| **7** | 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. |
| **8** | 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. |
| **9** | Enter the communication port's termination string in the **TERM STRING** field. | |
| **10** | Select the call type from the **CALL TYPE** drop down list. | |

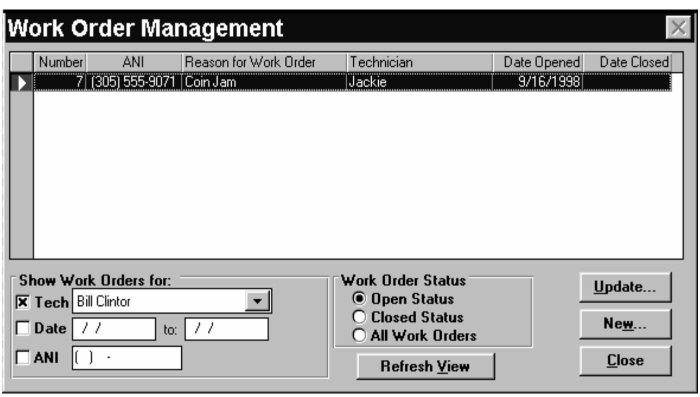
| | | |
|---|---|---|
| 11 | Select the line type from the **LINE TYPE** drop down list. | |
| 12 | Click on **UNDO** if you have made any typing errors. | |
| 13 | Click on **CLOSE**. | Saves your modem and port settings. Returns the **POLL MANAGER** screen. |

# 5. SERVICE MANAGEMENT

## 5.1 Work Order Maintenance

From **OPERATOR CONSOLE**:

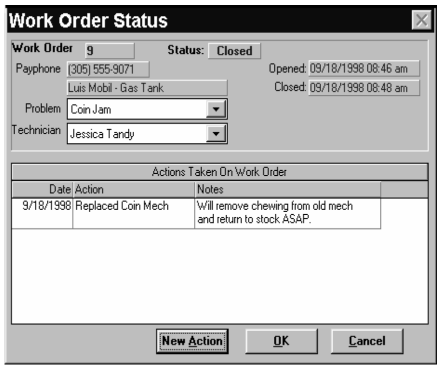
| | | |
|---|---|---|
| **1** | Click on the **SERVICE MANAGEMENT** icon. | The **SERVICE MANAGEMENT MENU** appears. |
| **2** | Click on **2** (Work Order Maintenance). | The **WORK ORDER MANAGEMENT** screen displays the list of all open work orders. |




| | |
|---|---|
| **3** | Organize how you want to view work orders. You can sort them by Status, Technician, Date Range, or Phone ANI. |

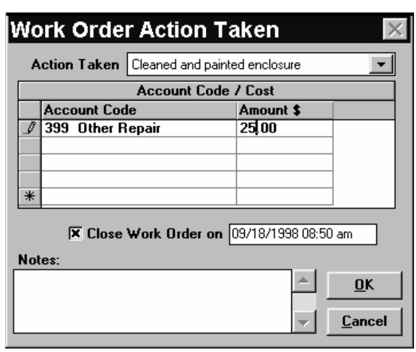
**4** Select the work order you want to update by clicking on the box to the left of the work order. Click **UPDATE**.

The **WORK ORDER STATUS** screen appears.




**5** You can add an action to the work order by clicking on **NEW ACTION**.

The **WORK ORDER ACTION TAKEN** screen appears.



| | | |
|---|---|---|
| **6** | From the **ACTION TAKEN** drop down list, select the action that you took. | |
| **7** | 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. |
| **8** | Enter the amount of the action in the **AMOUNT** field. | |
| **9** | 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. |
| **10** | Enter any optional notes for this action in the **NOTES** field. | |
| **11** | 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***. |

| | | |
|---|---|---|
| **12** | Click on **OK**. | Returns the **WORK ORDER MANAGEMENT** screen**.** If you close the work order, it no longer appears when **OPEN STATUS** is selected in the **WORK ORDER STATUS** window. |
| **13** | Click on **CLOSE**. | Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. |

## 5.2 Customer Service (211)

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

From **OPERATOR CONSOLE**:

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

| | | |
|---|---|---|
| **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. | |
| **6** | Select the radio button within the **HOW HANDLED** box that describes how the problem will be handled. | |
| **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. | PNM Plus adds the amount to the Cost Accounting Journal.<br><br>This field is required. |
| **8** | Select the reason for the complaint from the **COMPLAINT REASON** field drop down list. | This field is required. |
| **9** | Click on **OK**. | The complaint is entered into the database. Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU**. |

# 6. REPORTS

## 6.1 Controlling Report Contents

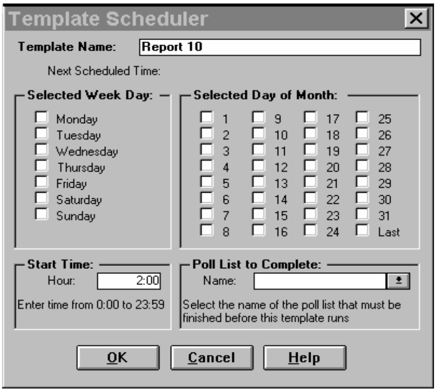
You can control which records are selected for processing on a report and the report format by using the report control screen.

### 6.1.1 MAKING A REPORT TEMPLATE

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 **SAVE**. Once you save and name the template, you can schedule when you want the report to run by clicking **SCHEDULE**.

From **REPORTS MAIN MENU**:

| | | |
|---|---|---|
| **1** | Select the type of report and click **RUN**. | The reports control screen for the type of report you specified appears. |
| **2** | Set up the report to include the information you want. Click **SAVE**. | PNM Plus asks you to name the new template. |
| **3** | Enter a name for the template, and click **OK**. | PNM Plus saves your new template to the database and returns to the reports control screen. |
| **4** | Click **SCHEDULE**. | The **TEMPLATE SCHEDULER** screen appears. |




| | | |
|---|---|---|
| **5** | Next, specify when you want the report to run. If you do not specify either a day of the week or a specific date within the month, the report template will not run.<br><br>Click **OK**. | PNM Plus returns the report control screen. |
| **6** | Click **OK**. | PNM Plus returns the **REPORTS MAIN MENU**. |

### 6.1.2 RUNNING A REPORT

From **REPORTS MAIN MENU**:

| | | |
|---|---|---|
| **1** | Select the type of report and click **RUN**. | The reports control screen for the type of report you specified appears. |
| **2** | Set up the report to include the information you want. If you want to run a template, select the template name in **TEMPLATES**. | |
| **3** | Click **RUN**. | PNM Plus displays the specified report. |
| **4** | When you are finished viewing the report, select the Exit button. | PNM Plus prints your report and returns the report control screen. |
| **5** | Click **OK**. | PNM Plus returns the **REPORTS MAIN MENU**. |

# 6.2 Controlling Report Output

You can view reports on the screen, send them to a printer, send them to a file, or send them to a fax machine.

From **REPORTS MAIN MENU**:

| | | |
|---|---|---|
| 1 | Select the type of report and click **RUN**. | The reports control screen for the type of report you specified appears. |
| 2 | Set up the report to include the information you want. If you want to run a template, select the template name in **TEMPLATES**. | |
| 3 | If you want to view the report on the screen, click **SCREEN** in **OUTPUT TO**. | |
| 4 | If you want to send the report to the printer, click **PRINTER** in **OUTPUT TO**. | The **PRINT SETUP** screen appears. |
| 5 | Specify the printer you want to use and click **OK**. | PNM Plus prints your report and returns the report control screen. |
| 6 | If you want to send the report to a file, click **FILE** in **OUTPUT TO**, and then click **SETUP**. | The **OUTPUT FILE SETUP** screen appears. |

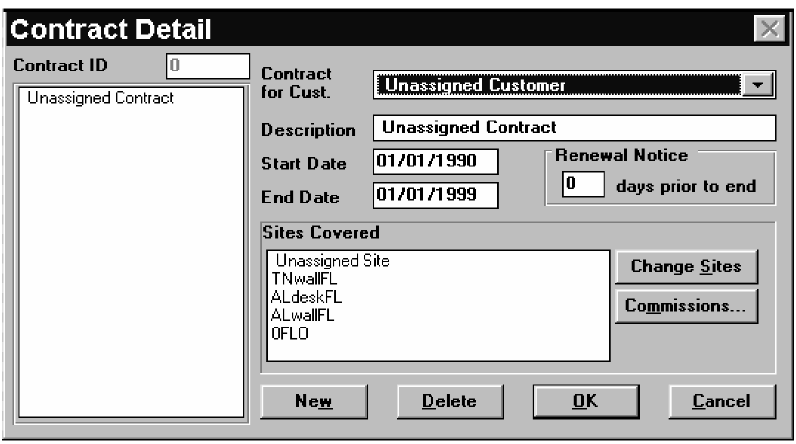
| | | |
|---|---|---|
| **7** | Specify the output format and file name. Valid formats include:<br>• Microsoft Excel (.xls).<br>• Rich Text Format (.rtf).<br>• MS-DOS Text (.txt).<br><br>If you have FX-WORKS for faxing, that option also appears, allowing you to output the file to a fax.<br><br>Click **OK**. | PNM Plus outputs your report and returns the report control screen. |
| **8** | Click **CLOSE** on the report control screen. | PNM Plus returns the **REPORTS MAIN MENU**. |

# 7. BUSINESS ADMINISTRATION

## 7.1 Creating a New Contract

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| 1 | Click on the **BUSINESS ADMINISTRATION** icon. | The **BUSINESS ADMINISTRATION MENU** appears. |
| 2 | Click on **2** (Contract Information). | The **CONTRACT DETAIL** screen appears. |




| | | |
|---|---|---|
| 3 | Click on **NEW**. | |
| 4 | Assign a customer to the contract by selecting a customer from the **CONTRACT FOR CUST** drop down list. | |

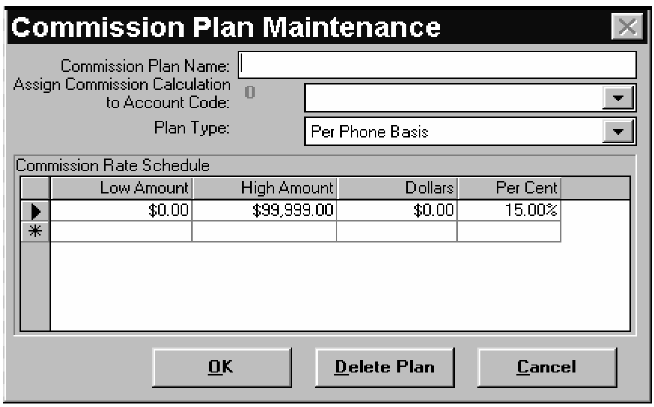
| | | |
|---|---|---|
| **5** | Enter the name of the contract in the **DESCRIPTION** field. | |
| **6** | Enter the Start and End Dates of the Contract in the **START DATE** and **END DATE** fields. | |
| **7** | In the **RENEWAL NOTICE** field, enter the number of days before a customer's contract 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 **MAIN MENU.** |

## 7.2 Creating a Commission Plan

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click on the **BUSINESS ADMINISTRATION** icon. | The **BUSINESS ADMINISTRATION MENU** appears. |
| **2** | Click on **2** (Contract Information). | The **CONTRACT DETAIL** screen appears. |
| **3** | Select the contract for which you want to set up commissions. | |

| | | |
|---|---|---|
| **4** | Click on **COMMISSIONS**. | The **COMMISSION PLAN** screen appears. |
| **5** | Click on **NEW PLAN**. | The **COMMISSION PLAN MAINTENANCE** screen appears. |



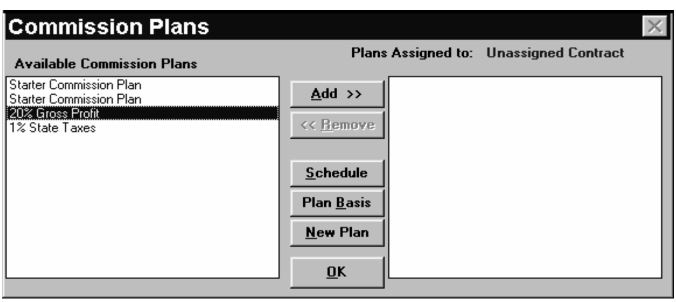

| | | |
|---|---|---|
| **6** | Enter the Commission Plan description in the **COMMISSION PLAN NAME** field. | |
| **7** | In the **ASSIGN COMMISSION CALCULATION TO ACCOUNT** field, click on the arrow and select the account to be assigned a commission calculation from the drop down list. | |

| | | |
|---|---|---|
| **8** | In the **PLAN TYPE** field, click on the arrow and select a plan type from the drop down list. | |
| **9** | Enter the Commission Rate Schedule in the **COMMISSION PLAN MAINTENANCE** screen **COMMISSION RATE SCHEDULE** fields. | Refer to Chapter 9 of your *PNM Plus Operation Manual* for further information on Commission Rate Schedules. |
| **10** | Click on **OK.** | PNM Plus notifies you that you have not yet assigned account codes to this commission plan. |
| **11** | Click on **OK.** | The **COMMISSION PLAN BASIS** screen appears. |
| **12** | Select the account codes to be added to the commission plan. | The **COMMISSION PLANS** screen appears. |
| **13** | Click on **OK.** | The commission plan is added to the database. Returns the **CONTRACT DETAIL** screen. |
| **14** | Click on **OK**. | Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU.** |

# 7.3 Assigning a Commission Plan to a Contract

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| 1 | Click on the **BUSINESS ADMINISTRATION** icon. | The **BUSINESS ADMINISTRATION MENU** appears. |
| 2 | Click on **2** (Contract Information). | The **CONTRACT DETAIL** screen appears. |
| 3 | Select the contract to which you want assign a commission plan. | |
| 4 | Click **COMMISSIONS**. | The **COMMISSION PLAN** screen appears. |




| | | |
|---|---|---|
| 5 | From the **AVAILABLE COMMISSION PLANS** list box, select the commission plan you want to assign to this contract. | |

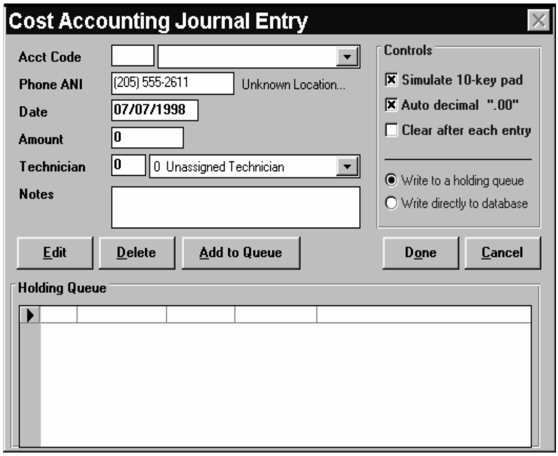
| | | |
|---|---|---|
| **6** | Click **ADD**. | PNM Plus moves the specified commission plan to **PLANS ASSIGNED TO**. |
| **7** | Click **OK**. | PNM Plus assigns the commission plan to the contract, and returns the **CONTRACT DETAIL** screen. |
| **8** | Click **OK**. | Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU.** |

## 7.4 Adding Cost Accounting Journal Entries

If you have received new income or had a new expense, you need to add it to the Cost Accounting Journal.

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click on the **BUSINESS ADMINISTRATION** icon | The **BUSINESS ADMINISTRATION MENU** appears. |
| **2** | Click on **3** (Cost Accounting). | The **COST ACCOUNTING JOURNAL** screen appears. |
| **3** | Click on **NEW**. | The **COST ACCOUNTING JOURNAL ENTRY** screen appears. |




**4** Click on the second box in the **ACCT CODE** field and select an account code from the drop down list.

**5** At the **PHONE ANI** field, enter the ANI of the phone that had the income or expense.

**6** Enter the date for the journal entry in the **DATE** field.

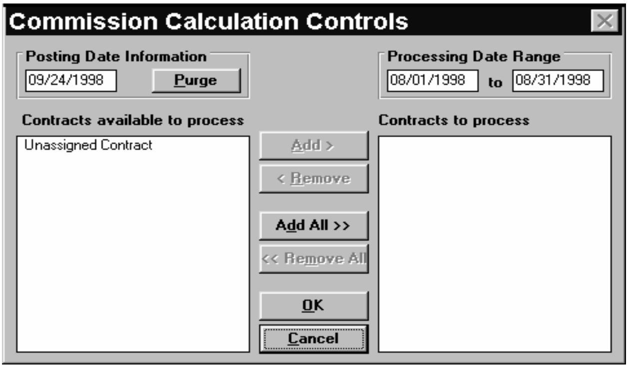
**7** Enter the amount of the income or expense in the **AMOUNT** field.

| | | |
|---|---|---|
| **8** | Click on the arrow to the right of the **TECHNICIAN** field and select the technician who collected the money or made the repair. | |
| **9** | Enter any notes relating to this entry in the **NOTES** field. | |
| **10** | Add the entry directly to the PNM plus database, or send the entry to the holding queue. | Refer to Section 9.1.4 in your *PNM Plus Operation Manual* for further instruction on these options. |
| **11** | Click on **CLOSE**. | Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU.** |

## 7.5 Calculating Commissions

From **OPERATOR CONSOLE**:

| | | |
|---|---|---|
| **1** | Click on the **BUSINESS ADMINISTRATION** icon. | The **BUSINESS ADMINISTRATION MENU** appears. |
| **2** | Click on **4** (Commission Calculation). | The **COMMISSION CALCULATION CONTROLS** screen appears. |

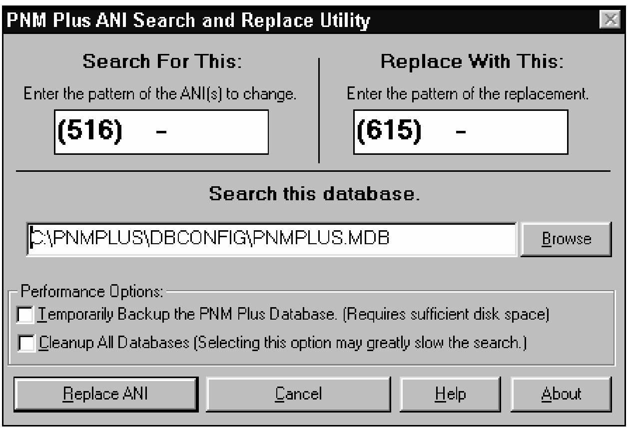



| | | |
|---|---|---|
| 3 | In the **PROCESSING DATE RANGE** fields, enter the date range to use for the calculation. | |
| 4 | Enter the posted date in the **POSTING DATE INFORMATION** field. | This is the date that is stamped to the calculated commission amount. |
| 5 | Select and **ADD** the contract in the **CONTRACTS AVAILABLE TO PROCESS** list box for which the commission amounts will be calculated. | The contract moves to the **CONTRACTS TO PROCESS** list box. |
| 6 | Click on **OK**. | The **COMMISSION PROCESSING** screen updates you on the progress of the commission calculation. |
| 7 | When the commission calculation is complete, click on **CLOSE**. | Returns the **PNM PLUS OPERATOR CONSOLE** screen **MAIN MENU.** |

# 8. USING UTILITIES (ANI EDIT)

From **UTILITIES MAIN MENU**:

| | | |
|---|---|---|
| **1** | Click **CHANGE ANI**. | The **PNM PLUS ANI SEARCH AND REPLACE UTILITY** screen appears. |




| | | |
|---|---|---|
| **2** | In the **SEARCH FOR ANI(S)** field, enter the ANI you want to change. | |
| **3** | In the **REPLACE WITH ANI(S)** field, enter the ANI that you want to replace the ANI in the **SEARCH FOR ANI(S)** field. | |

| | | |
|---|---|---|
| 4 | In the **SEARCH THIS DATABASE** field, enter the database containing the ANI you want to change. | |
| 5 | In the **PERFORMANCE OPTIONS** window, you may select a temporary backup or a cleanup and compaction of all databases. | |
| 6 | 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.<br><br>When the replacement is complete, the **ANI SEARCH AND REPLACE COMPLETE** screen displays the results. |
| 7 | Click on **OK** to accept the changes. | PNM Plus returns the **PNM PLUS ANI SEARCH AND REPLACE UTILITY** screen. |
| 8 | Click on your answer to the prompt. | Returns the **PNM PLUS ANI SEARCH AND REPLACE UTILITY** screen. |
| 9 | Click **DONE**. | Returns the Windows desktop. |

# 9. FREQUENTLY-ASKED QUESTIONS (FAQS)

***Note**: You must have PNM 2.2.1 or higher to convert your data from PNM to PNM Plus properly.*

Q. Where do I set up the dialing patterns for each phone?

A. The dialing patterns for the phones are handled on the **SITE DETAIL** screen.

Q. I converted my data and find all of my information in Operator Console, but Poll Manager does not show any information.

A. Operator Console and Poll Manager are not pointing to the same database. Turn to Section A.2 in the *PNM Plus Operation Manual* (P/N 3350231) and follow the steps in Section 7.3.1 in your *Operation Manual*.

Q. I tried to rename my database according to the instructions in Section A.2 in the PNM Plus Operation Manual (P/N 3350231). I am getting an “invalid parameter” error message.

A. Try using these steps from Windows Explorer:

Click the *LECTOCLE* directory.

Click the file named *CONVERT.MDB*.

Click **FILE - RENAME** on the toolbar.

Enter *PNMPLUS.MDB* and click **OK**.

Click and drag all files into the C:\PNMPLUS\DBCON-FIG subdirectory.

Now return to Section A.2 and complete the steps starting at step 22.

Q. I converted my data but Operator Console doesn't show any information.

A. Operator Console is not pointing to the right database. On the PNM Plus **MAIN MENU**, click **CONFIGURATION**, then **10** (System Configuration), and set the PNM Plus Database Location to the proper file.

Q. I have only one modem on my system. With Poll Manager open, I get the message "Communications port not responding or not available" when I try to dial out in Operator Console.

A. When Poll Manager is running, it grabs the modem to handle any incoming calls or auto polls that may occur. It does not share the modem; therefore, the modem is unavailable to any other application. If you must dial out, close Poll Manager, or deselect **PORT ACTIVE** in the Poll Manager Port Setup.

Q. What kind of network should I run this on?

A. Elcotel has tested and recommends PNM Plus on Novell 3.12 and Novell 4.0 providing the record locks are set high enough (check your network manuals for this information). We also recommend a Windows NT network.

Q. How should I set up PNM Plus on my network?

A. There are many ways to run PNM Plus on a network. The most common way is to have the database on a common drive. You would then have only one copy of Poll Manager pointing to the common database and could have many copies of Operator Console pointing to that common database as well. This way all machines access the same data.

Q. I downloaded my phones and now when I contact them again, I get a message that the Password is incorrect.

A. You probably did not assign a PNM Plus password on the **PHONE DETAIL** screen. Assign a PNM Plus password, default the board (see your phone manual for phone defaulting, or resetting procedures), and download to the phone.

# 10. 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 you may encounter through Poll Manager.

| 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. |
| Comm Lib Error | Communications library missing / failure. |
| Disk Full | Unable to write to the disk; disk full. |

| Reason Terminated | Possible Causes |
|---|---|
| File Does Not Exist | PNM Plus tried to send a nonexistent 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 | No answer received from the phone. 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. |

# INDEX

## A



## C

# O



# P



# R



# S