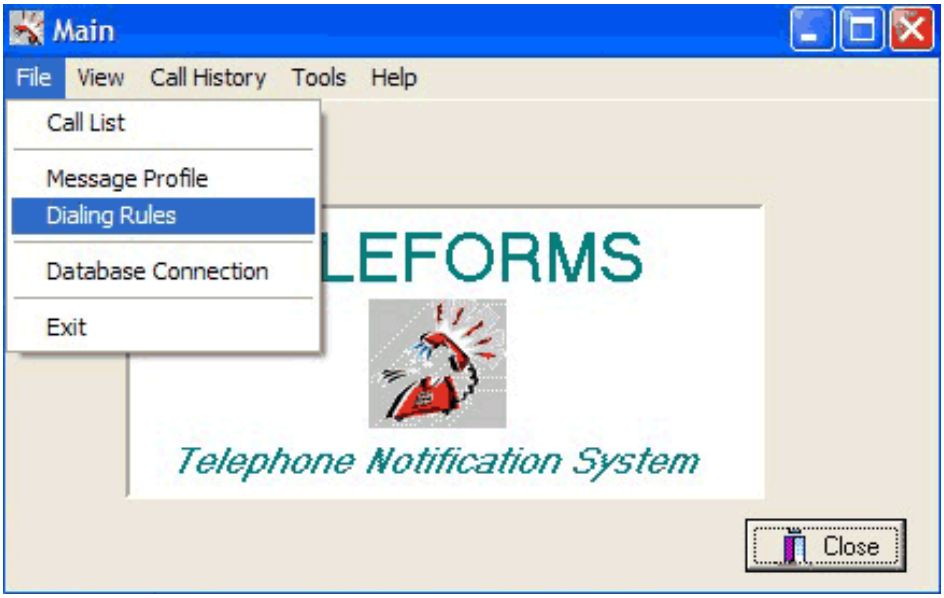
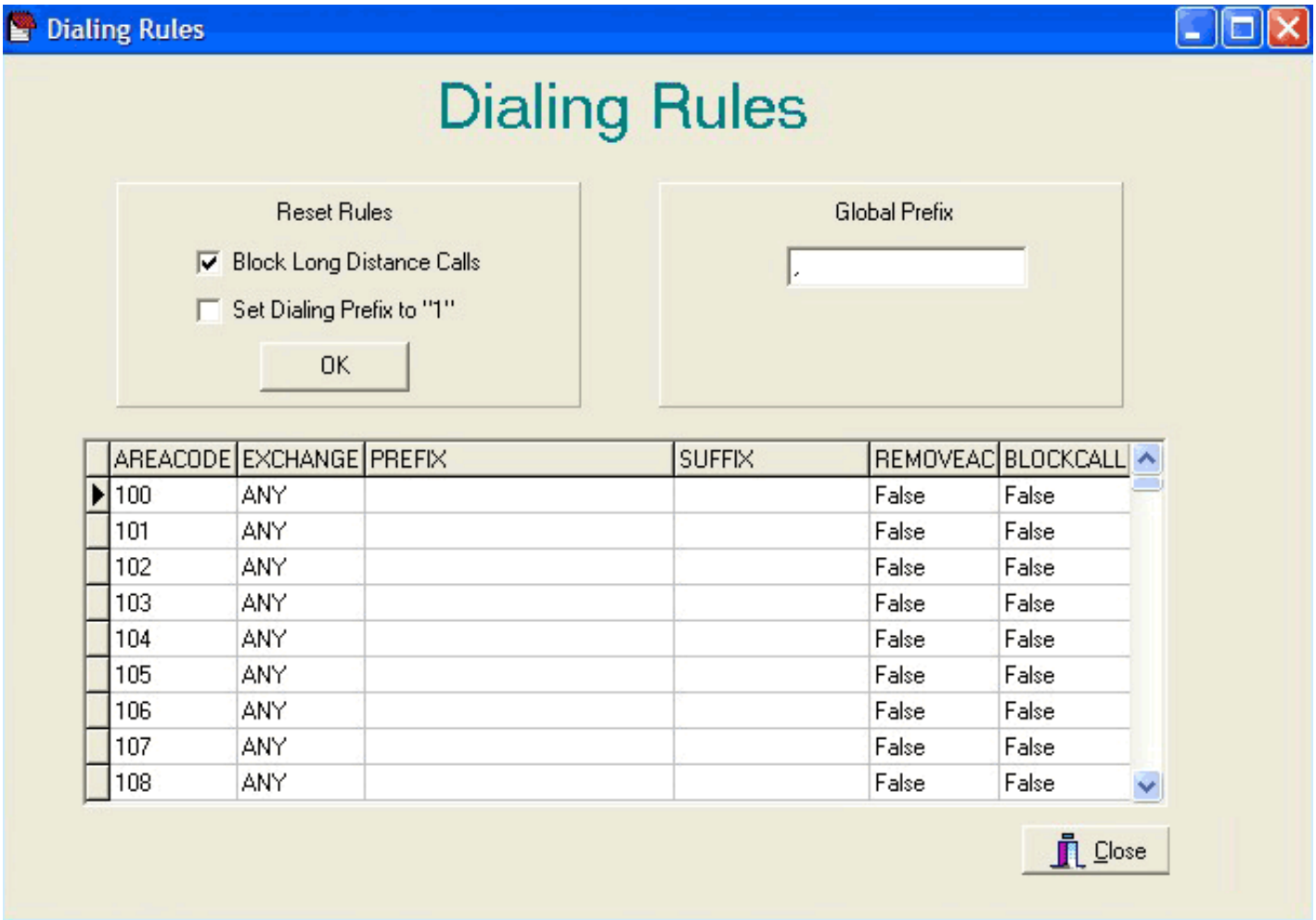
dialing rules

Teleforms uses dialing rules for the library's policies on how to call patrons. Dialing rules can block long distance calls from being made and specify which exchanges within an area code should or should not be called. Before modifying the dialing rules on an existing machine, stop calls (click Stop button found under Current Status).

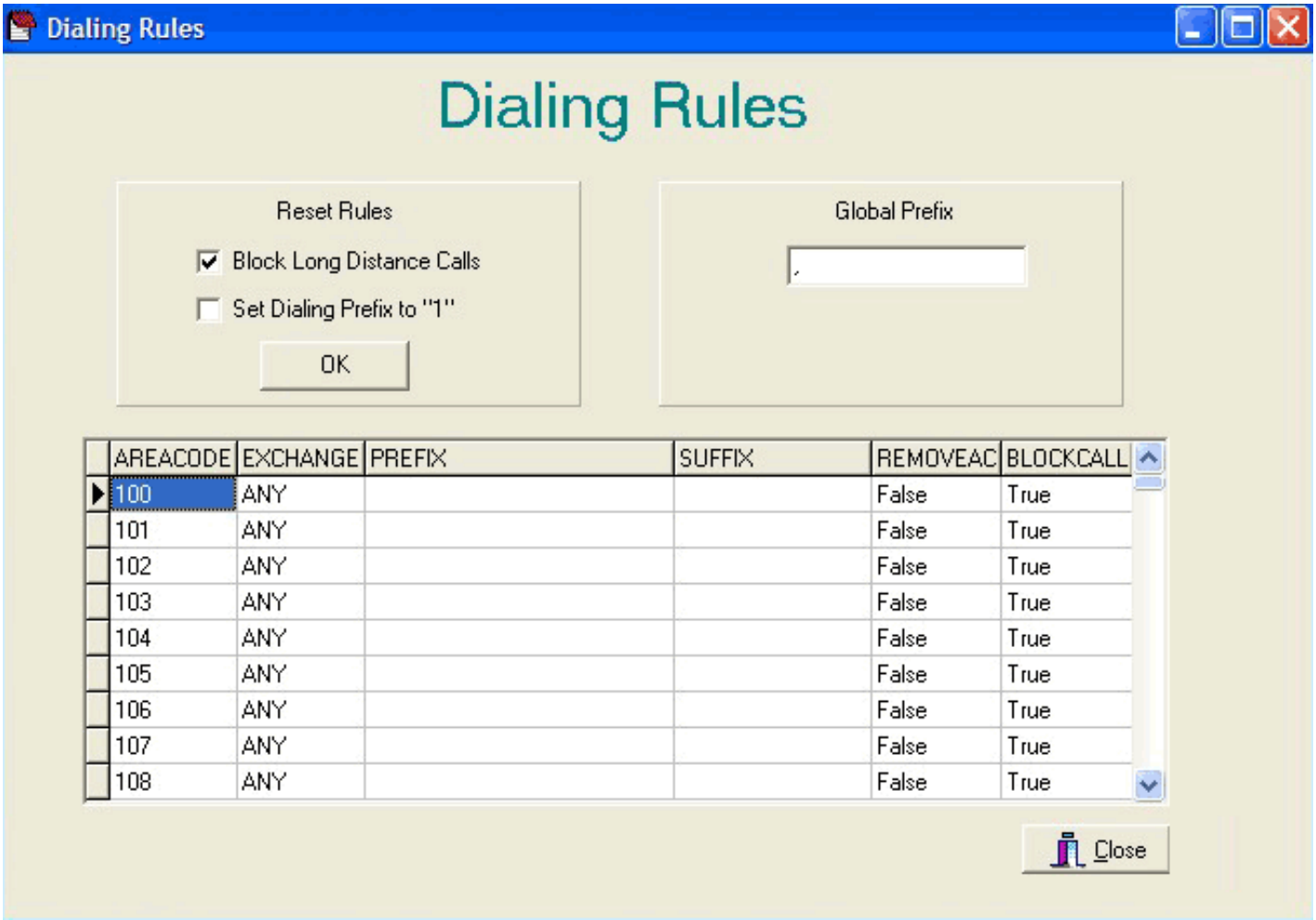
Under the Edit drop-down menu choose dialing rules.





The first step in Dialing Rules configuration is to decide whether your library wishes to block all (or most) long-distance calls. If so, you can block calls for all area codes at once by checking the box for "Block Long Distance Calls" and clicking OK. This will set the "Block Call" element to "true" for every area code and exchange in the table. (Likewise, you can unblock calls for all area codes by unchecking the box and clicking OK.) This will allow you to configure most of the table correctly with one action. Once you have made this global change, you can configure specific area codes and exchanges individually, using the instructions below.

Please note that every time you open the Dialing Rules window, the "Block Long Distance Calls" box will be checked, regardless of the actual dialing rules configuration. However, no changes will be made to your Dialing Rules unless you click the "OK" button to change to all dialing rules.



HOT TIP - If you click on OK in the reset rules box and the area codes go out of order, click on OK again to get them back in order. However, if you click OK after you have configured your dialing rules the way you want them, your configurations will be lost.

Before setting the dialing rules, you need to know the structure of a typical phone number as Teleforms reads it. Using 1 (510) 655-6200 as an example:

Prefix	Area Code	Exchange	Suffix
1	510	655	6200

In the dialing rules, there are 6 columns to be filled out (not all cells need to be completed):

AREACODE - Teleforms has a listing of all the possible area codes in use in the United States. If you block all long distance calls, your Teleforms Machine will only work in the area code(s) of your immediate area.

EXCHANGE - This column allows you to limit the specific exchanges of your patrons. For libraries located in large area codes that do not want to toll call across the area code, use this configuration to specify which exchanges in your area

code should or should not be called.

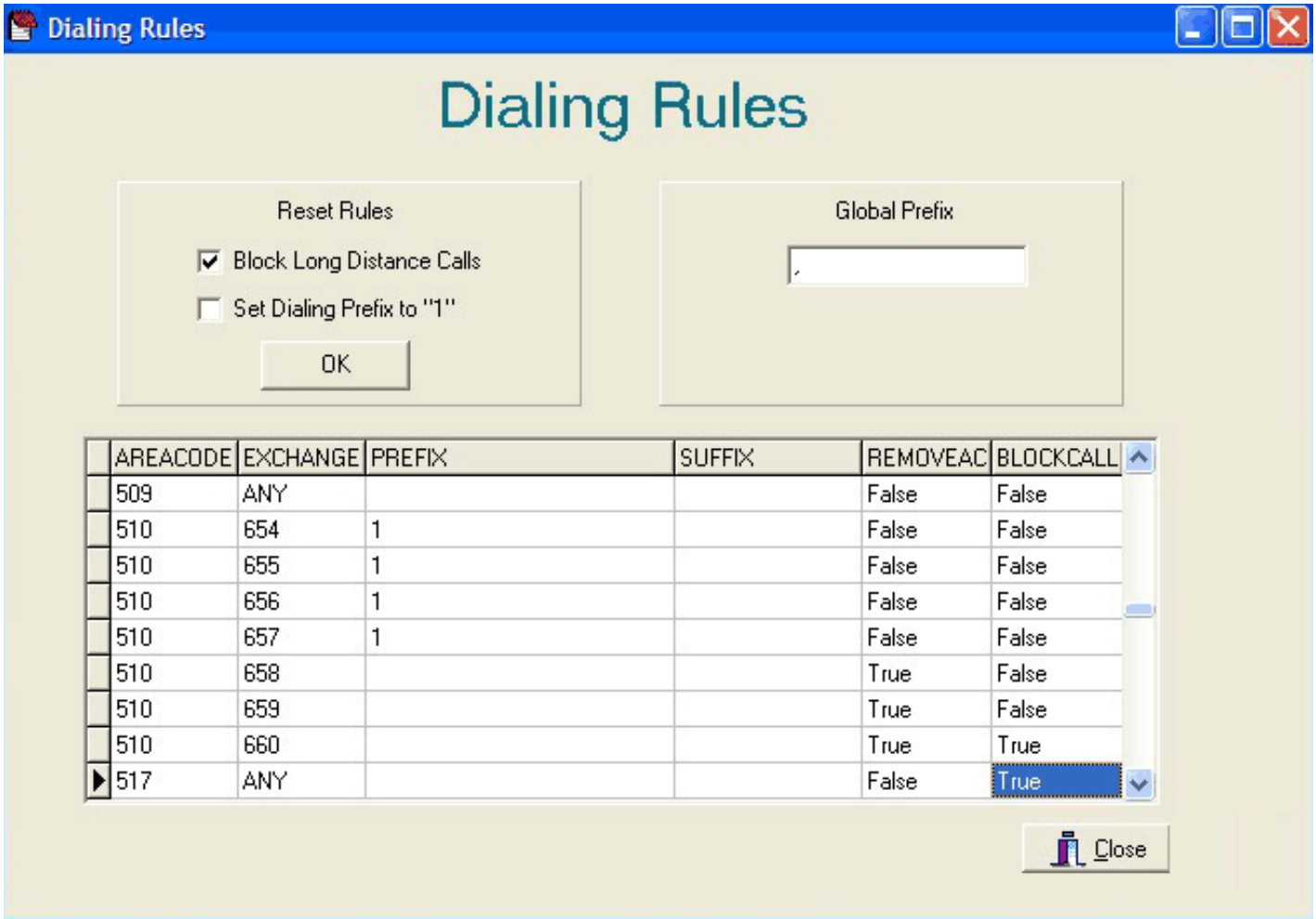
PREFIX - Enter "1" in this cell if Teleforms will be toll calling across an area code. Instead of entering 1 into each cell, you can also click the "Set Dialing Prefix to one" under Reset Rules.

SUFFIX - Usually this cell is empty. Dialing rules are built on a general level. Specific suffixes (i.e. single telephone numbers) are controlled within the patron record.

REMOVEAC - If set to True, this rule will remove the area code from the number to be called. It is a useful feature for calls made in same area code AND local calling area for the library.

BLOCKCALL - If set to true, this rule will block the calls made to this area code or an area code/exchange combination.

For an example of how these rules will look, see the example below.



AREACODE	EXCHANGE	PREFIX	SUFFIX	REMOVEAC	BLOCKCALL
509	ANY			False	False
510	654	1		False	False
510	655	1		False	False
510	656	1		False	False
510	657	1		False	False
510	658			True	False
510	659			True	False
510	660			True	True
517	ANY			False	True

In the example, Teleforms will dial every number in the 509 area code.

For area code 510, Teleforms will dial exchange 654 as 1-510-654-XXXX because both the REMOVEAC and BLOCKCALL are set as False and the PREFIX is set as 1. It will do the same for exchanges 655, 656 and 657.

For area code 510, Teleforms will dial exchange 658 as 658-XXXX because the REMOVEAC is set to True and the BLOCKCALL is set as False. Teleforms will do the same for 659.

For Area Code 510, Teleforms will not dial numbers with exchange 660 because the BLOCKCALL is set to True. For this case, REMOVE AC is ignored.

Because there is not an ANY line for Area Code 510, all of the exchanges not listed (001-653 and 661-999) are considered invalid. Adding the ANY line for 510 will provide a generic rule for numbers not covered by the specific exchanges.

For Area Code 517, all exchanges are blocked because the BLOCKCALL is set as True.

HOT TIP - To add multiple exchanges to an area code, simply overwrite the area codes on the following lines. You can also use the "Insert" button on your computer to add another line; however, any lines added this way show up at the end of the list of area codes. If your library will not be calling a certain area code, it does not harm Teleforms to overwrite it with an area code/exchange it should be calling.

HOT TIP - If library system has multiple multiple Teleforms machines, consider placing the machines in locations that reduce the number of long distance or toll calls sent by Teleforms.

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