



SmartConnect

User Guide

Contents

Contents	3
SmartConnect End User License Agreement	4
Section One	
SmartConnect Installation Guide	8
Section Two	
Using SmartConnect	15
Section Three	
Getting More Out Of SmartConnect	69

SmartConnect End User License Agreement

This End-User License Agreement (EULA) covers the SmartConnect and SmartConnect Enterprise software products.

IMPORTANT - READ CAREFULLY: This End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) ("YOU") and Oak Telecom Ltd ("OAK") for the OAK product(s) accompanying this EULA, which include(s) computer software and may include "online" or electronic documentation, associated media, and printed materials ("SOFTWARE PRODUCT"). An amendment or addendum to this EULA may accompany the Product. By installing, copying, or otherwise using the SOFTWARE PRODUCT or any UPDATES (as defined below), YOU agree to be bound by the terms of this EULA. If YOU do not agree to the terms of this EULA, do not install, copy, or otherwise use the SOFTWARE PRODUCT; however, YOU may return it to your place of purchase for a full refund. In addition, by installing, copying, or otherwise using any updates or other components of the SOFTWARE PRODUCT that YOU receive separately as part of the SOFTWARE PRODUCT ("UPDATES"), YOU agree to be bound by any additional license terms that accompany such UPDATES. If YOU do not agree to the additional license terms that accompany such UPDATES, YOU may not install, copy, or otherwise use such UPDATES.

SOFTWARE PRODUCT LICENSE

Copyright laws and international copyright treaties, as well as other intellectual property laws and treaties protect the SOFTWARE PRODUCT. This EULA does not grant YOU any rights in connection with any trademarks or service marks of OAK. All title and intellectual property rights in and to the SOFTWARE PRODUCT (including but not limited to any images, photographs, animations, video, audio, music and text incorporated into the SOFTWARE PRODUCT), the accompanying printed materials, and any copies of the SOFTWARE PRODUCT, are owned by OAK. YOU may not copy the printed materials accompanying the SOFTWARE PRODUCT. This EULA grants YOU no rights to use such content. All rights not expressly granted under this EULA are reserved by OAK.

The SOFTWARE PRODUCT is licensed, not sold. The SOFTWARE PRODUCT is licensed to YOU for use on a single computer only. The SOFTWARE PRODUCT may not be installed, accessed, displayed, run, shared or used concurrently on or from different computers, including a workstation, terminal or other digital electronic device. YOU may not make access to THE SOFTWARE PRODUCT available to others in connection with a service bureau, application service provider, or similar business. If OAK has not provided YOU with a back-up copy of the SOFTWARE PRODUCT, YOU may make a single back-up copy of the SOFTWARE PRODUCT. YOU may use the back-up copy solely for archival purposes. Except as expressly provided in this EULA, YOU may not otherwise make copies of the SOFTWARE PRODUCT, including the printed materials accompanying the SOFTWARE.

LIMITED WARRANTY. OAK warrants that (a) the SOFTWARE PRODUCT will, for a period of ninety (90) days from the date of delivery, perform substantially in accordance with OAK's written materials accompanying it, and (b) any Support Services provided by OAK shall be substantially as described in applicable written materials provided to you by OAK.

CUSTOMER REMEDIES. In the event of any breach of warranty or other duty owed by OAK, OAK's and its suppliers' entire liability and your exclusive remedy shall be, at OAK's option, either (a) return of the price paid by you for the SOFTWARE PRODUCT (not to exceed the suggested retail price) if any, (b) repair or replacement of the defective SOFTWARE PRODUCT or (c) re-performance of the Support Services. This Limited Warranty is void if failure of the SOFTWARE PRODUCT has resulted from accident, abuse, or misapplication. Any replacement SOFTWARE PRODUCT will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer.

NO OTHER WARRANTIES. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, OAK AND ITS SUPPLIERS DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT, WITH REGARD TO THE SOFTWARE PRODUCT AND THE PROVISION OF OR FAILURE TO PROVIDE SUPPORT SERVICES. THE LIMITED WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS. YOU MAY HAVE OTHERS, WHICH VARY FROM COUNTRY/STATE/JURISDICTION TO COUNTRY/STATE/JURISDICTION. Some countries and states and jurisdictions do not allow disclaimers of or limitations on the duration of an implied warranty, so the above limitation may not apply to you. To the extent implied warranties may

not be entirely disclaimed but implied warranty limitations are allowed by applicable law, implied warranties on the SOFTWARE PRODUCT, if any, are limited to ninety (90) days.

IN ADDITION, IN NO EVENT DOES OAK AUTHORIZE YOU TO USE THE SOFTWARE PRODUCT IN APPLICATIONS OR SYSTEMS WHERE THE SOFTWARE PRODUCTS FAILURE TO PERFORM CAN REASONABLY BE EXPECTED TO RESULT IN SIGNIFICANT ENVIRONMENTAL DAMAGE, PHYSICAL INJURY, OR IN LOSS OF LIFE. ANY SUCH USE BY YOU IS ENTIRELY AT YOUR OWN RISK, AND YOU AGREE TO HOLD OAK HARMLESS FROM ANY CLAIMS OR LOSSES RELATING TO SUCH UNAUTHORIZED USE.

All rights of any kind in THE SOFTWARE PRODUCT which are not expressly granted in this EULA are entirely and exclusively reserved to and by OAK. YOU may not rent, lease, lend, modify, translate or create derivative works based on THE SOFTWARE PRODUCT. YOU may not reverse engineer, decompile, or disassemble the SOFTWARE PRODUCT, except and only to the extent that such activity is expressly permitted by applicable law notwithstanding this limitation. The SOFTWARE PRODUCT is licensed as a single product. Its component parts may not be separated for use on more than one computer.

The package for the SOFTWARE PRODUCT may contain multiple versions of this EULA, such as multiple media versions (e.g., in the user documentation and in the software). In this case, YOU are only licensed to use one (1) copy of the SOFTWARE PRODUCT.

YOU may permanently transfer all of your rights under this EULA only as part of a permanent sale or transfer of the SOFTWARE PRODUCT, provided YOU retain no copies, YOU transfer all of the SOFTWARE PRODUCT (including all component parts, the media and printed materials, any upgrades and this EULA), and the recipient agrees to the terms of this EULA. If the SOFTWARE PRODUCT is an upgrade, any transfer must also include all prior versions of the SOFTWARE PRODUCT.

Without prejudice to any other rights, failure to comply with any and all of the terms and conditions of this EULA will result in immediate and permanent termination of this EULA. In such event, YOU must immediately destroy all copies of the SOFTWARE PRODUCT and all of its component parts.



Section One
Installation Guide

SmartConnect Installation Guide

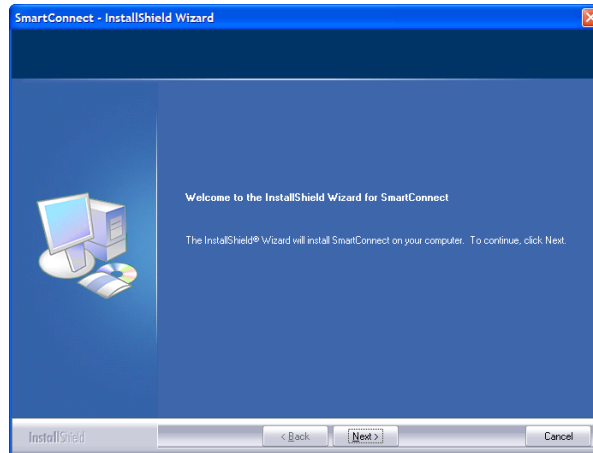
To install SmartConnect, first make sure no programs are running and that you are logged on to your computer as an administrator. Next, proceed to the appropriate step below:

Installing from a CD-ROM

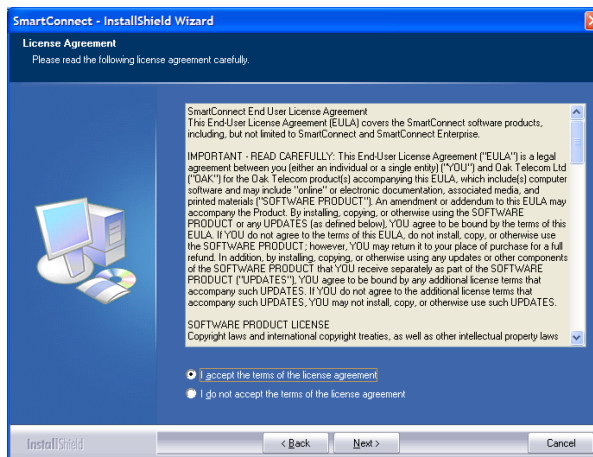
Insert the CD-ROM into your CD-ROM drive and follow the instructions on screen. If setup does not begin click **Start**, click **Run**, and enter **D:\SmartConnectSetup.exe** in the **Open** box that appears (replacing **D** with the letter of your CD-ROM drive). Click **OK** and installation will begin.

Installing from an Internet distribution

Use **My Computer** or **Explorer** to browse to the folder where you extracted the SmartServer installation files. Double-click on the **SmartConnectSetup.exe** file. Installation will begin.

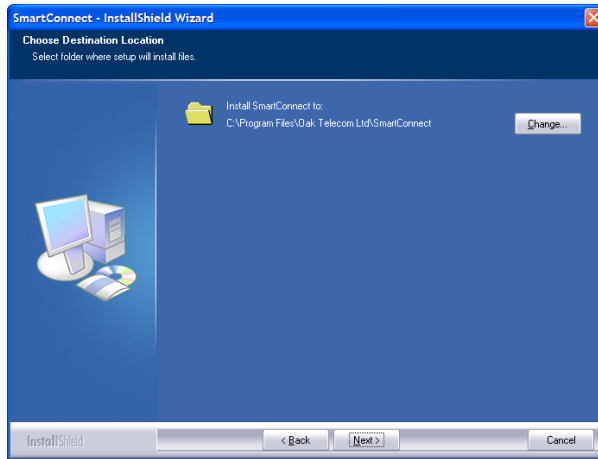


On the first screen that appears, click **Next**.

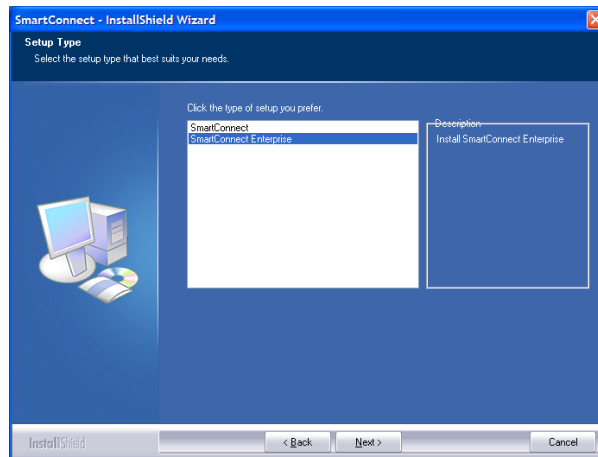


The next screen displays a license agreement. You must agree to the terms set out in the agreement or you cannot install SmartConnect. To indicate your acceptance

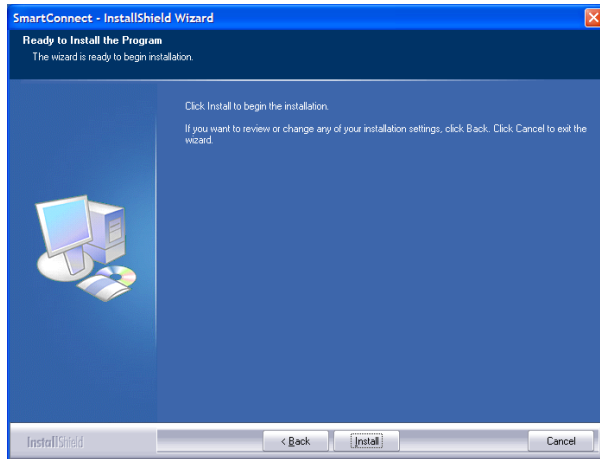
of the terms, select **I accept the terms of the license agreement** and then click the **Next** button.



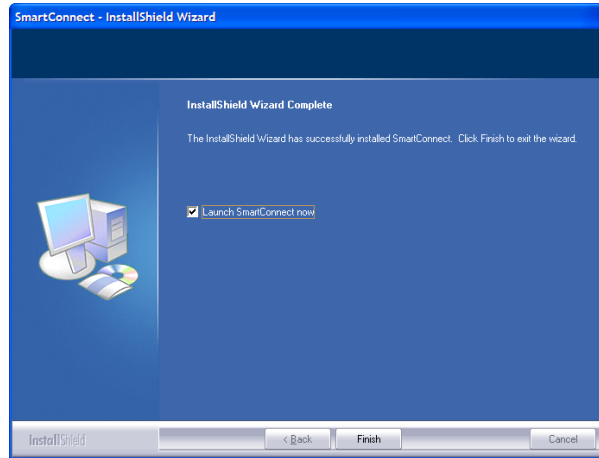
The next screen asks you to confirm the location to install SmartConnect to. Click **Change** if you don't want to install it to the default directory. Click **Next** when you are ready to proceed.



On the next screen, select the type of SmartConnect license you have purchased – either: **SmartConnect**, or **SmartConnect Enterprise** – and click the **Next** button.



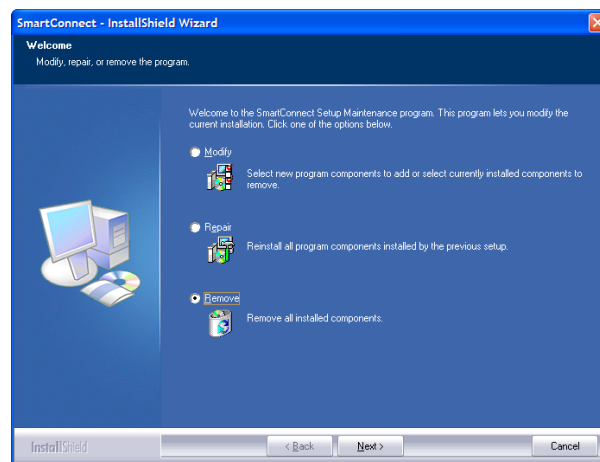
This is your last chance to change your mind about installing. If you are ready to install, click the **Install** button. Otherwise, click **Back** to change which version of SmartConnect to install, or click the **Cancel** button to exit without installing.



When installation is complete, this screen will appear. If you leave the **Launch SmartConnect now** checkbox checked SmartConnect will start after you click **Finish**.

Uninstallation

If you ever wish to uninstall SmartConnect, make sure it isn't running, double-click the **My Computer** icon on your desktop, double-click **Control Panel**, double-click **Add/Remove Programs**, and in the list that appears, highlight **SmartConnect** and click **Add/Remove**.



On the SmartConnect Maintenance screen, select **Remove** and click **Next**. When SmartConnect has finished being uninstalled from your computer, click **Finish**.



Section Two Using SmartConnect

Using SmartConnect

Welcome to SmartConnect!

Thank you for choosing SmartConnect - the world's premier CTI software. This document will attempt to explain in as simple a way as possible how to use SmartConnect. This document was designed for persons who have only a limited knowledge of computers.

There is also: (i) a Quick-Start guide; (ii) a guide to getting more out of SmartConnect; (iii) an FAQ which answers common questions posed by SmartConnect users; and (iv) an installation/uninstallation guide which talks you through installing SmartConnect on your computer. If you do not have these, please visit the Oak Telecom web site at: www.oak.co.uk

This manual is broken up into eleven parts:

Introduction: shows you how to start SmartConnect, and explains some of the terms used in this manual.

The Tray Menu: explains a little about the tray menu and what the items on it do.

Quick Features: an introduction to SmartConnect's one click features menu.

Last Number Redial: explains the **Last Number Redial** sub-menu.

Absence Text: what it is and how to use it.

To do list: tells you all about the **To do list** screen and explains how to use it.

Address Book: guides you through the **Address Book** screen showing you what everything does and some of the things you can do from the **Address Book**.

Extension Status: shows you around the **Extension Status** screen and shows you how to do things such as calling extensions and transferring calls.

The Phone Window: shows you what the various features of the **Phone** window are, and how to get the most out of them.

Call History: this section guides you around the **Call History** screen and explains what you can do there.

Configuration: shows you how to change the settings of your SmartConnect to make it work the way you want.

We are sure that after reading this manual, you will find SmartConnect easy to use and find it an immensely useful tool in your working day.

Introduction

What Is SmartConnect?

SmartConnect is a Computer Telephony Integration (CTI) product. This means it links your desktop computer and telephone system together. Specifically, it links your telephone handset to your database of contacts. CTI is at the heart of the future office and SmartConnect was one of the first CTI products of its kind to be released in the United Kingdom.

Also available from Oak Telecom are other CTI products including SmartPhone and SmartOperator. They enable control of your telephone handset from your PC, and SmartOperator is enhanced to make it easier for operators and receptionists to control queues of calls.

What Does SmartConnect Do?

SmartConnect links over your network to a computer running SmartServer. The SmartServer computer is connected to the switchboard your company uses to make and receive all its telephone calls. So the SmartServer computer knows at any time what telephone calls are in progress. It uses this information to tell all the computers running SmartConnect who is on the telephone to whom. Using this information, you can tell if somebody you need to speak to is on the telephone or not. In addition, if you are a supervisor, you can monitor the amount of time spent by employees talking on the telephone.

You also connect your databases of contacts to SmartConnect so that when somebody in one of the databases calls your company, their name and their company name can be displayed instead of just their telephone number. This gives you the advantage of knowing who is calling before answering the telephone. It also eliminates the need of trying to remember people's telephone numbers. You can let SmartConnect do it for you!

SmartConnect also supports scripts written in VBScript to do such things as search for the person calling you in your company database and then popping their information onto your computer screen.

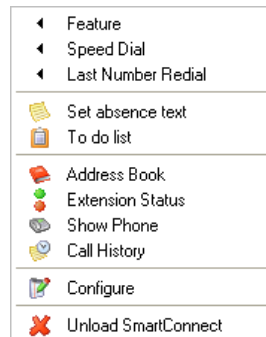
As well as dialing from the SmartConnect **Address Book**, you can use SmartTSP to dial from programs that support TAPI dialing (via SmartConnect).

With the **Call History** screen, you can view calls you missed – even if your computer was turned off when you received the calls. You can view who the calls were from and the date and time that the calls were made. You can also call the person back from this screen.

Getting Started

Throughout this document, whenever the word “click” is used, it means press and release your primary (left) mouse button. If the document reads “right-click”, it means press and release the secondary (right) mouse button. If the document reads “double-click”, it means press and release your primary (left) mouse button twice in quick succession.

SmartConnect will load when you turn on your computer. If it does not, click the **Start** button (in the bottom-left corner of your screen). A menu will pop up. On the menu, point your mouse cursor at **Programs**. Another menu will pop out of the side of the **Start** menu. On this new menu, point your mouse cursor at **SmartConnect**. On the menu that appears, click on **SmartConnect**. If you are presented with a SmartConnect login screen, enter your extension number in the Username box, and your SmartConnect password in the Password box. These can be obtained from your network administrator.



If you use a laptop, you may not be connected to your office network when you turn on your computer. If this is the case, SmartConnect will not login. Instead, the icon will go gray and will test every few minutes to see if your machine is part of a network with SmartServer running on it.

To access all of SmartConnect’s features, you use the SmartConnect icon in the System Tray (also known as the Notification Area). The System Tray is the sunken area in the very bottom-right corner of your screen. It might have such things in it as a clock (showing the current time), a picture of a speaker (if you have speakers attached to your PC) and security applications you may have loaded. The SmartConnect icon is the circle. The circle may be red, green, yellow, gray, or flashing.

If the circle icon is red, it means your telephone is off the hook (i.e. you are in the middle of a telephone call).



If the circle icon is green, it means your telephone is on the hook (i.e. you do not have any calls in progress).

If the circle is yellow, it means your telephone is in Do Not Disturb or Forward All Calls mode.

If the circle icon is flashing red and gray, it means your phone is ringing.

When this document tells you to open a certain SmartConnect screen or window, it means click the SmartConnect icon in the System Tray, and then click the said item from the tray menu that appears.

The Tray Menu

To access the tray menu, you click on the little colored circle described above. This circle is the SmartConnect icon. A menu will roll out showing up to twelve items (depending on your system privileges).

The items available are:

Feature: Displays a sub-menu listing the Feature Codes that your system has been set up to work with. Clicking one of the items will dial that feature code for you.

Speed Dial: Displays a sub-menu containing your personal speed dial numbers. Clicking one of the numbers makes your handset place a call to the number.

Last Number Redial: Displays a sub-menu with the last 10 telephone numbers of persons you spoke to. Click one of the contacts to start a telephone call to them.

Set absence text: Enables you to set or change your Out Of Office Absence Text.

To do list: Shows the list of messages you have sent/received and any internal or external Callbacks you have set.

Address Book: Shows the **Address Book** screen. From here you can search for contacts by name, company name, or telephone number. Then you can dial the contact, view their call history, edit their details, delete them, or set a Callback on them. You may also add new contacts to your contact database from this screen.

Extension Status: Displays the **Extension Status**, which is a list of all monitored extensions. From this screen you can transfer calls, view call histories, see who is using SmartConnect, set Callbacks, pick-up other people's calls, ring people, and see who people are on the phone to.

Show Phone: Shows the **Phone** window. From the **Phone** window you can see information on your active calls such as caller, called, and duration. You may also have up to 8 context-sensitive buttons on the phone window, which you can use to run scripts or hang-up the telephone etc.

Call History: Selecting this will display your history of last 50 calls of a certain type. You can select whether to show the last calls made internally, externally, just the calls you missed, or all calls. From the **Call History** screen you can also look at calls in more detail, ring people back, and look at contact information (like you can from the **Address Book**).

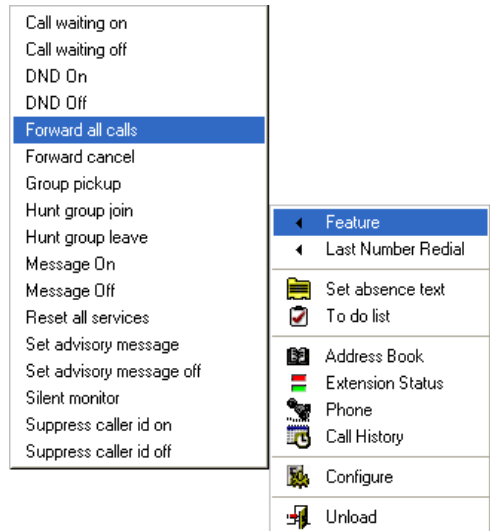
Configure: Shows the configuration screen. This is where you can edit your information such as name, department, and password, and change your options like whether or not to “pop” the **Phone** window on incoming phone calls.

Unload SmartConnect: Select this to exit SmartConnect. The icon from the tray will disappear, and you will no longer receive SmartConnect text messages, screen pops, or Callbacks. However, your call history will continue to be updated even when you do not have SmartConnect loaded.

Quick Features

If your system is set up for it, you may have a Features sub-menu on the SmartConnect Tray Menu. This menu may contain such items as: turn on/off Call Waiting, Do Not Disturb, Call Forwarding, Caller Id, Send Message etc.

To use these features, simply click on the desired feature. This is much simpler than having to remember long or complicated codes to turn on/off features that you may use often such as Call Forwarding or Do Not Disturb, leaving you free to concentrate on other things.



A list of the features currently supported and a description of each is listed below. Please note that some or all of these features may not be supported by your telephone system.

Call Waiting On/Off – turns on or off the warning beeps/indicators that your telephone makes to inform you that you have another call incoming. Some people find these tones distracting.

Door Open – if you have a Door Entry system at your offices, you can use this to unlock/open the door for staff and visitors.

DND On/Off – turns on or off the Do Not Disturb mode of your telephone. If you are in a meeting, and do not wish to be “disturbed” by the telephone ringing, select **DND On** and callers will hear a busy tone.

Forward all calls/Forward cancel – turns on or off forwarding of calls from your extension to another number. When you click **Forward all calls**, you will need to enter the telephone number to forward calls to from your telephone handset.

Group pickup – click this to have your extension answer a call if it is not ringing on your extension directly, but you are a part of the same group that the ringing extension is a part of. **Warning:** If your telephone supports it, and your receiver is on-hook, this will automatically put your telephone into speakerphone mode.

Hunt group join/Hunt group leave – join or leave a “hunt group.” When you are in the hunt group, and somebody directly phones another extension in the group, if the originally dialed extension does not answer after a predetermined amount of time, your telephone will start to ring also, allowing you to pick up their call. If you leave the hunt group, you will not be able to do this.

Message On/Off – turn on or off an Advisory Message, a message light, a broken dial tone, or other feature to indicate that an extension has a message. Clicking this will require you to enter an extension number to send the message to from your telephone handset, and possibly other options depending on your telephone system.

Night Answer On/Off – turn on or off the Night Service mode of your telephone system. Usually, during Night Service only certain phones will ring, or all calls will be diverted to the company voicemail system. You may also use Night Service during lunchtimes or at any time when nobody will be available to answer your phones. Depending on your telephone system, you may only be able to do this from certain extensions.

Page – This will place a call to another extension, and have that extension’s telephone put into speakerphone mode automatically without ringing so that you can have a conversation with them without having to shout across the office! This feature is also known as “Speaker call” on some telephone systems.

Reset all services – this resets your telephone back to its default settings. E.g. it turns off Forwarding, Do Not Disturb, Night answer, etc.

Set Advisory Message/Set Advisory Message Off – sets or turns off an Advisory Message or Absence Text so that whenever another extension calls your extension, they get a message indicating that you are unavailable to take the call. This could be useful when you go out to lunch to let others in the office know why you aren't answering your telephone.

Silent Monitor – silently listen in on another extension's telephone call. When you click this, a dialog box may appear on the computer screen asking you to enter the extension number you want to monitor. Only super-administrators can perform silent monitoring. Using this may be illegal in certain countries/jurisdictions.

Suppress Caller Id On/Off – when turned on, your telephone will not give out any Calling Line Identification to the person you called. This means your telephone number will not show up on their telephone or telephone system. To restore caller id, use Suppress Caller Id Off.

NB Clicking an item in the Quick Feature list simply emulates dialing the selected feature code at your handset. The features themselves are controlled by your telephone system, not by the SmartConnect software. Therefore, if they do not work as expected, it is likely because of a telephone system fault, not a problem with SmartConnect.

Speed Dial

The **Speed Dial** list is a list of frequently used telephone numbers that you have entered, so you can call them without having to remember the number or search for it. You are probably familiar with a similar function on your telephone handset.

To call one of the numbers in the **Speed Dial** list, you just have to click on it.

To configure the names and numbers that are displayed in the list, please read the SmartConnect Configuration section later in this manual.

Speed dials are unique to each user. That means you can't share a speed dial list with other users.

Last Number Redial

The **Last Number Redial** list shows a menu of up to 10 telephone numbers. Clicking on one of the numbers will place a call to that person.

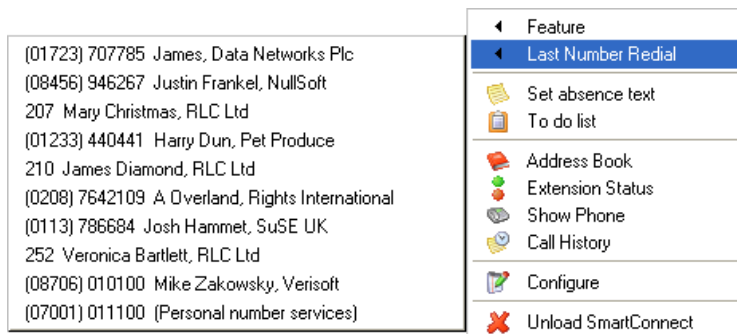
These numbers are stored locally on each SmartConnect machine, so the numbers you see on your machine may differ to those on another person's machine.

The numbers that get stored are the last 10 telephone numbers that you either called, or received a call from while you were logged in to SmartConnect. This includes unanswered calls, missed calls, and calls to your group.

If you call a number more than once, it will still only show up in the list once. However, it will move the entry to the top of the list.

If the telephone number was resolved to a contact name found in an Address Book, then by the side of the number, the contact's name and company will be displayed. Otherwise, the originating number's town name will be displayed.

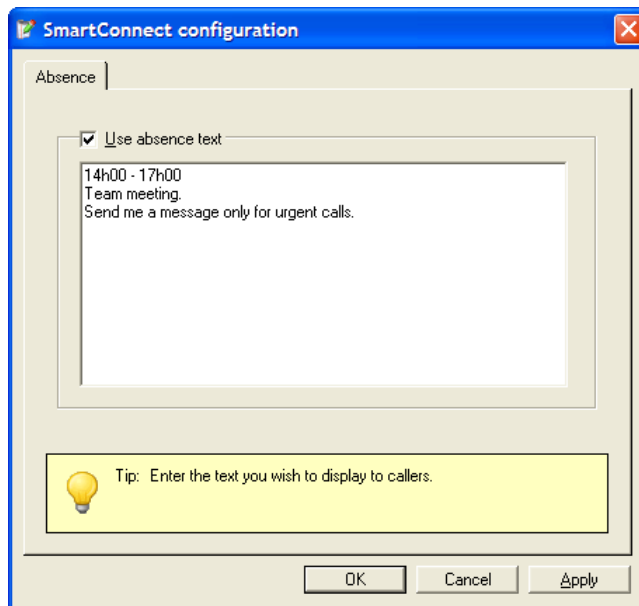
Only calls where the telephone number is known will be displayed. If you receive a call from an unknown number, it will not show up in the **Last Number Redial** list. Also, any phone calls you make or receive while not logged in to SmartConnect will not show up in the **Last Number Redial** list even when you do log in.



Absence Text

In many popular email programs, it is possible to set an “Out Of Office Auto-Reply” which will inform people who send you email that you are absent and therefore cannot respond. You can also set Advisory Messages on certain telephone systems that will display a pre-defined message to callers such as “Out to lunch” or “Vacation”.

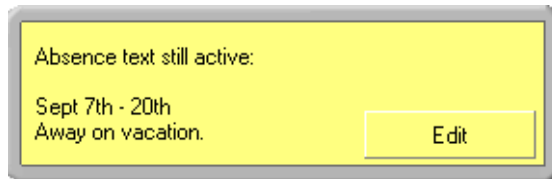
SmartConnect’s equivalent feature is called **Absence Text**. When you have an absence text set, if a SmartConnect user calls your extension they will see whatever absence text you set appear on their computer screen. They will also see your absence text when they rest their mouse cursor over your extension on the **Extension Status** window. Likewise, you will see the absence text that other users have set.



To turn on or off your absence text, click **Set absence text** from the SmartConnect tray menu. The **SmartConnect configuration** window will appear

enabling you to turn on or off your absence text by clicking the **Use absence text** checkbox. You can also change the text that is displayed by typing in the textbox that is on this screen.

Whenever you log in to SmartConnect, if your absence text is still turned on, a message will appear in the bottom-left corner of your screen to inform you so that you remember to turn it off if necessary. Click the **Edit** button on the window that appears to edit the text and/or turn it off.



NB Some users may not have the necessary security settings to use absence text. Also, administrators have the ability to change anybody's absence text and to turn it on or off.

The To Do List

This screen could be described as being like the Messages menu on your mobile phone or like an email program such as Outlook Express. Using SmartConnect, you can send and receive instant SmartConnect text messages to other SmartConnect users in your company. For instance, someone could send you a message asking you to call a customer, or to tell you the outcome of a telephone call they made earlier.

Using SmartConnect, you can also set Callbacks – these are used when someone you need to speak to is on the phone. If you set a Callback, SmartConnect will notify you as soon as that extension is off the phone so that you can call them and speak to them.

External Callbacks are useful to use on contacts or customers that call in from outside your company. If you have an External Callback set on someone, and they phone anybody in your company, you will be notified and optionally asked whether you want to pickup the call. Also, when somebody you have set an External Callback on contacts your company and you don't answer the call, you will be sent a SmartConnect text message informing you.

When you open the **To do list**, you will see a screen similar to the one below. The list on the left side of the screen represents the folders where your messages and Callbacks are stored.

Inbox – click on this folder to view a list of received text messages. New messages that you have not yet read will be in bold. The Date/Time column shows the date and time that the message was sent. If the message was sent the day you look at the **To do list**, rather than a date, the word **Today** followed by a time will appear in the Date/Time column.

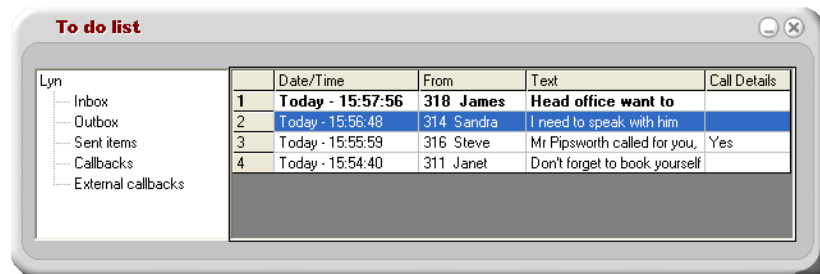
Outbox – click on this to view a list of the messages you have sent that have not yet reached their destination (normally because the person you sent them to hasn't logged in to SmartConnect since you sent the message. Whilst a message is still in your Outbox, you may cancel sending it by opening and then deleting it.

Sent items – this folder lists the SmartConnect messages you have sent. Messages in this list have already been delivered to the recipient's computer.

Callbacks – displays a list of the Callbacks that you have set on extensions. Every time one of the extensions in the list replaces their handset, SmartConnect will inform you using the message you provided when you set the Callback.

External callbacks – clicking on this will display a list of contacts that you have set External Callbacks for. The first column displays the name and/or company of the contact. The second column shows when somebody from your company last spoke with this contact. The third column shows the message that will be displayed to you when this contact calls/is called by your company. Double-clicking an item in this folder will bring up the **Contact Details** screen, opened at the **Callback** tab.

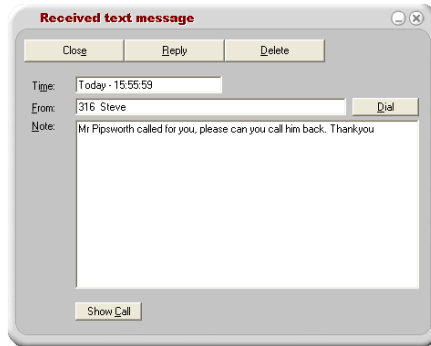
To view a message that is in any of the other folders apart from **External callbacks**, simply double-click it from the list. It will open up into a window from which you will be able to reply to the sender of the message, call the sender of the message, or delete the message.



For more information on setting Callbacks and sending SmartConnect text messages, see the Extension Status section later in this document.

Receiving Text Messages

When you receive a text message and you are logged in to SmartConnect, the **Received text message** window pops up. This window tells you the date the message was sent, who the message was from, and displays the contents of the message. To put the message into your Inbox, click **Close**. To reply to the message, click **Reply**. To permanently delete the message, click **Delete**. To call the extension that sent you the message, click **Dial**. If the message was sent with call details attached, you may click **Show Call** to view details about the call such as who originally answered it etc.

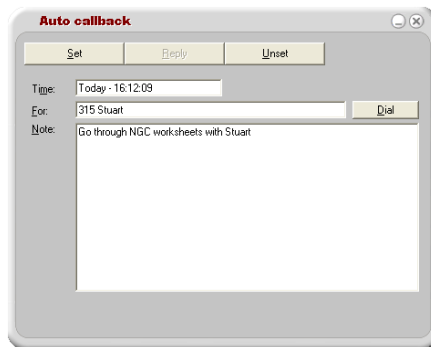


If you have received messages when you have not been logged in to SmartConnect, they are saved on the SmartServer computer for you. The next time you log in to SmartConnect, the **To do list** will be automatically displayed with the **Inbox** folder open.

NB If you have a very large amount of messages in your Inbox and other folders, it may take a couple of seconds longer for SmartConnect to completely start up.

Auto Callbacks

After you have set a Callback for an extension, every time the extension you set the Callback for gets off the phone, the **Auto callback** window is displayed. Then you can either click **Set** to cancel the **Auto callback** window, and have it re-appear when the extension hangs up their phone again, **Unset** to cancel the callback so that it is not shown anymore. Or you can click **Dial** to call the extension. To view a Callback that you have previously set, open the **Callbacks** folder in the **To do list**, and double-click the desired Callback. Another way to view a previously set callback is to click on the extension that the callback is set on from the **Extension Status** window and from the menu that appears, select **Show callback**.



External Callbacks

External Callbacks are Callbacks that you can set on contacts found in your Address Books. When you view a contact's details from the **Address Book** screen or from the **Call History** or **Call Detail** screen, you can use the **Callback** tab to add an External Callback for that contact. When you add an External Callback for a contact, every time that contact rings anyone in your company, you will be informed with a message and/or given the opportunity to answer the call even if the contact didn't ring your department.

To delete an External Callback that you have set on a contact, double-click it in the **External callbacks** folder of the **To do list**, and from the **Callback** tab of the **Contact Details** window, click **Remove**.

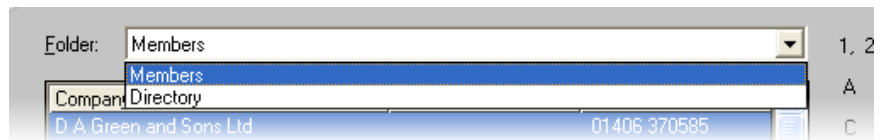
NB Each extension may only set a maximum of one Callback per contact.

The Address Book

From the **Address Book** screen, you can search through your databases of contacts; find out the date and time of the last call to/from a contact; view extra Contact Details (such as address); Dial a contact; view the Call History of a contact; add, edit, and delete contacts; and set External Callbacks on contacts.

Selecting Address Book

If your system uses more than one Address Book to store contacts, you may select which one to search through. First, click the down-arrow button to the right of the **Folder** drop-down list. Next, select which Address Book you want to search from the list shown. This will become the active Address Book which will be used for searching, adding, and for the alphabetical index list.

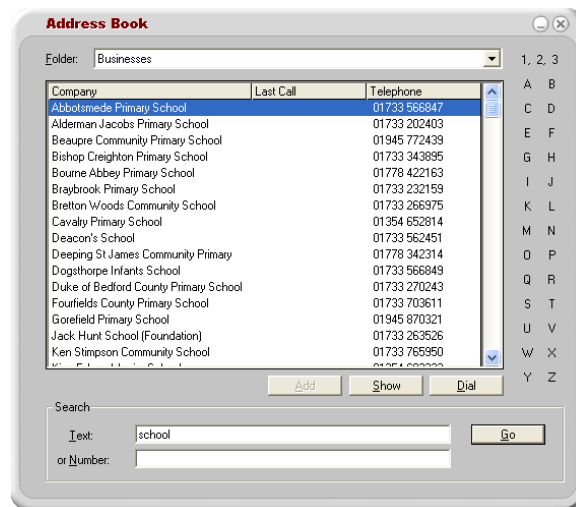


The Extensions folder stores a list of all the extensions that work at your company, so you can search and dial an extension if there are too many to see on the Extension Status window.

The Directory folder represents SmartServer's own internal address book which you can use to add, edit, and remove contacts.

Searching for Contacts

To search for a contact, you may use their name, their company name, or their telephone number (or part of their name, company name, or telephone number). You may also search by the first letter of the contact's name or company name (depending on how your system has been set up).



To search for a contact using their name or their company name, first make sure the **Number** box is empty (has no telephone number in it). Now, enter the text to search for in the **Text** box (near the bottom of the window) and either click **Go** or press the return (or enter) key on your keyboard.

A second later, up to 50 contacts in your Address Book that match the entered text will appear in the results grid (the main area of the **Address Book** screen).

To search for a contact by telephone number, make sure the **Text** box is empty, enter the telephone number in the **Number** box and click **Go** (or press return on your keyboard).

As before, up to 50 contacts in your Address Book whose telephone numbers match the one you entered will appear in the results grid.

If you can search by first letter, there will be a number of buttons (labeled **1, 2, 3** and **A** through **Z**) down the right hand side of your **Address Book** screen. Clicking on these buttons will display all contacts in the selected Address Book that begin with that letter. This is like an alphabetical index of contacts in your Address Book.

For instance, if the active Address Book is set up to search by company name, and you click the **F** button, up to 50 contacts whose company name begins with the letter **F** will be displayed. If the active Address Book is set to search by contact name, contacts whose name begins with **F** will be displayed.

Dialing a Contact

Once you have found the contact you are searching for, you will probably want to call them. You can do this by clicking on the contact you wish to dial (so that they are highlighted) in the main grid, and clicking on the **Dial** button. If the contact has more than one telephone number stored in your Address Book, clicking **Dial** will bring up a list of the telephone numbers so that you can choose which one to dial. If the contact has only one telephone number, SmartConnect will dial it as soon as you click the **Dial** button.

It is also possible to dial from the **Contact Details** screen, which is described below.

Viewing Contact Details

SmartConnect can store more details on your contacts than just their names and telephone numbers. It can also store such things as addresses, e-mail addresses, notes and any custom information that your company may store about customers, such as account details etc. SmartConnect also automatically stores a contact's Call History, so you can view when they were last in contact with your company.

To view the **Contact Details** screen, first highlight the contact whose details you wish to see (do this by clicking on them in the results grid). Now click **Show**. Alternatively, just double-click the contact in the results grid. A new screen opens showing the basic information (name, company, address, telephone numbers) on the contact. Next to each telephone number on this screen will be a **Dial** button. Clicking on it will dial the telephone number.

If your system allows it, you may make changes to the selected contact's details from this screen. Just edit the information you wish to change and click the **OK** button to close the screen and save the changes you have made. Clicking the **Delete** button will remove this contact from the Address Book they are in. If you delete a contact, you will lose their Call History, but that contact's name will still show in individual extension's Call Histories.

The screenshot shows a window titled "Contact (Directory)" with three tabs: "Details", "Callback", and "Call History". The "Details" tab is active. The form contains the following fields and buttons:

- Name: Barney Rubble
- Company: ESG Consulting
- Business: 01484 484484 (with a "Dial" button)
- Mobile: 07797 484159 (with a "Dial" button)
- Home: (empty field) (with a "Dial" button)
- Address: ESG Consulting, 1st Floor, Sears Park Offices
- Town: Bedlock
- Post Code: BE7 1EF
- Notes: Awaiting payment of invoice

At the bottom of the window are three buttons: "Delete", "OK", and "Cancel".

There may be an **Extra** tab on this screen. Clicking on this will display the custom extra information on the contact that your system administrator has provided. You may also make changes to this information if your system administrator has allowed it.

There will also be a **Callback** tab on this window. This tab lists all the users that have an External Callback set on this contact. If you do not have the privilege of viewing the extensions that have an External Callback set on a contact, this tab will just indicate whether you have one set. The top half of the tab contains a grid showing the extension numbers and names of people who have set an External Callback on the contact. Selecting one of the items of the grid list will display extra details about the External Callback in the bottom half of the tab. It displays the **User** who set the External Callback, the **Type** of External Callback, and the **Note** that will be sent to the user when the contact has been in touch.

If you have set an External Callback on a contact and wish to edit or remove it, highlight your name/extension from the list on the **Callback** tab and either click the **Remove** button to remove the External Callback, or edit the text and type of External Callback from the bottom half of the tab and click **Save** to save the changes.

To create an External Callback on a contact, press the **Add** button. This will only work if you do not already have an External Callback set on the contact whose details you are viewing. Choose the type of External Callback from the **Type** dropdown list. The types available are:

Send message – sends you a SmartConnect text message containing the text that you specify every time the contact calls anybody in your company. The text message is received once the call has ended.

Offer call – tells you on your computer when the contact is ringing any of the extensions monitored by SmartConnect so that you can answer the call if required. It does this by displaying a small window similar to the **Preview** window but that has a button on it allowing you to pick up the call if pressed.

Offer call and send message – Displays the **Pickup** window when the contact calls any extension in your company, and then sends you a text message when the call ends.

The last tab on this screen is the **Call History** tab. You may not be able to see this tab if your system administrator has not given you the privilege to see it. This tab shows the last 50 times that the selected contact called your company/was called by your company on any of their telephone numbers. The grid shows: the Date/Time the call was made; the Type of telephone call (**To** means your company called the contact, **From** means the contact called your company); the other Telephone number involved in the call (i.e. not the Contacts telephone number); the Name of the extension; and the Duration of the call. Highlighting one of the rows in the grid and clicking **Show Call** brings up further information on the call.

If the contact whose contact details record you are viewing comes from an external address book source (such as Goldmine) there will be an extra button in the bottom-left corner of the **Contact Details** window with the name of the address book type for a caption (in our example, **Goldmine**). Clicking this button will launch the external application and pop the contact's record.

Clicking the **Cancel** or **Close** button or clicking the **X** in the top right corner of the **Contact Details** screen will close the screen and return you to the **Address Book** screen without saving any changes you have made to the contact's details. Clicking **OK** will save the changes you have made and close the screen. Clicking **Delete** will delete the contact from your database and return you to the **Address Book** screen.

The Results Grid

The results grid is the main part of the **Address Book** screen. It shows the results of searches that you make, and is used to select which contact to dial/show details of. The columns in the results grid are as follows:

Name – name of the contact, displayed in surname, forenames format.

Company – company name associated with the contact.

Last Call – date and time of the last call made to/from the contact.

Telephone – the contact's telephone number(s).

Resizing

The **Address Book** screen can be resized bigger and smaller to make it the size that suits you. To do this, move your mouse over the "handle" in the bottom-right corner of the window (your mouse pointer will change to a diagonal line going top-left to bottom-right with an arrow at either end) then hold down the left mouse button and drag the mouse to make the window size change. When you are satisfied with the window size, release the mouse button.

The Extension Status

After the **Address Book**, the **Extension Status** is one of the most useful SmartConnect features. It enables you to see at a glance who is on the telephone, and who is not. It also enables you to see who people are on the telephone to, and how long the call has been in progress. From this screen, you can also dial extensions, transfer calls, pickup calls, send SmartConnect messages, set Callbacks and view Call Histories. You can also use it to see which users are logged in to SmartConnect and therefore are able to receive text messages.

Checking an Extension's Status

The **Extension Status** screen is divided into the departments different people in your company are in, so there may be a Sales department, a Technical Support department, a Customer Service department etc. Whether individual extensions can see all departments or just the department they belong to depends on the features the extension has enabled. The name of the department is shown in bold type at the top of the lists. The extensions are displayed in columns below the department name.



Depending on your security settings, you will either be able to see only extensions that are in your department or all extensions from all departments.

As you can see, each department can be expanded (shown) or collapsed (hidden) by clicking on the department name. This allows you to choose to see only the relevant departments, which is very useful if you have many extensions but only want to see the ones you are interested in.

Each extension is split up into three areas:

- The status lamp**
- The extension's number**
- The extension's name**

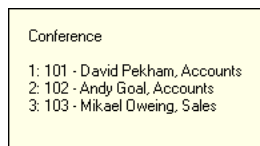
The Status Lamp

The status lamp is the small dot to the left of the extension. It will be colored in green, red, or yellow, or it will be flashing red. If the lamp is solid green, it means the telephone at that extension is on the hook. If the lamp is a solid red color, it means that the telephone at that extension is in use (off the hook). If the lamp is flashing gray and red, it means the telephone at that extension is ringing.

When an extension is diverting his or her calls, the lamp will appear a solid yellow color, indicating unavailable, and hovering your mouse over the extension will pop up a ToolTip telling you the name and telephone number that calls are being forwarded to. The Unavailable indicator is turned on automatically when you set your phone to divert etc. You do not need to do anything in SmartConnect in order to make use of this feature. This feature only works on compatible switches.

The Extension's Number

After the status lamp is a number indicating the internal telephone number of the extension. This is the number you would dial on your telephone, not the number external callers would need to dial.



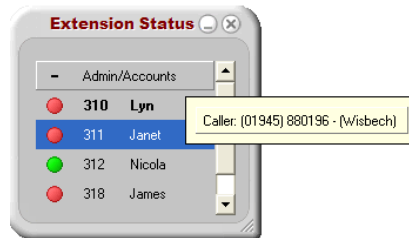
The Extension's Name

The last part of the extension status indicator is the name that SmartConnect associates with that extension. Your system administrator can change all names, and you can change your own name.

Later in the manual, you will learn how to change the display of the **Extension Status** screen to just display the extension numbers, and how to resize the window, and how to sort the window by name or extension number.

If an extension's name and number is in **bold type** it means they are logged in to SmartConnect. This means that any SmartConnect text messages you send to the extension will be received instantly.

If the status of an extension shows that the extension is off hook (a red circle), you can check who the extension is on the telephone to. You do this by resting your mouse over the extension. After a second or two, a small yellow window will pop up (like a ToolTip window). In this window will be displayed all calls in progress at the extension pointed to. It will display the Caller's telephone number and the Called person's telephone number. If the telephone number of the caller/called person is in your Address Book, their name and company name will appear in this screen as well as their telephone number. Clicking inside the yellow window will bring up a new screen showing when the call was started and how long it has been in progress. To make the yellow window disappear, simply move your mouse to somewhere else on the **Extension Status**.



Calling an Extension

If you wish to make a telephone call to one of the extensions in the **Extension Status** screen, all you have to do is click on the extension you want to call and click **Dial** from the menu that appears.

Transferring a Call

Using SmartConnect it is easy to transfer telephone calls. There are two types of transfer available, either announced or blind. An announced transfer is one where you consult with the person you are going to transfer the call to before actually making the transfer. This way, if they do not want to take the call, they do not have to. A blind transfer will transfer the call immediately, making the chosen extension's telephone ring. To transfer a call, you have to have an active call at your extension.

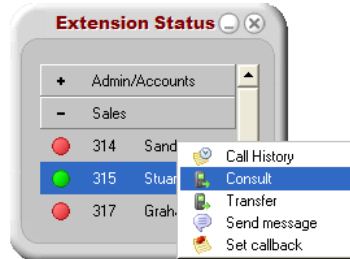
To make a blind transfer, open the **Extension Status** screen (if it isn't open already), choose the extension you want to transfer your call to and click on them. From the menu that appears, click **Transfer**. You will be disconnected from the call you were on and the extension that you clicked will be ringing.

To perform an announced transfer, click the extension you wish to consult with before transferring the call and click **Consult** from the menu that appears. The telephone call you are on will be put on hold, and when the extension you clicked on answers, you will be able to consult with them. To complete the transfer, replace your telephone handset. To cancel the transfer, have the person you were consulting with put their telephone down and then you will again be talking to the original person.

If, when clicking on the extensions in the **Extension Status** screen, you do not have the option to **Dial**, **Transfer**, or **Consult**, it is because your system administrator has stopped your extension from being able to dial using SmartConnect.

Viewing Call Histories

Just like the Call History that is kept for your contacts in the Address Book, SmartConnect keeps a Call History for all the extensions in your company. In addition, like a contact's Call History, your system administrator may have stopped certain extensions from viewing the Call History of other extensions. To check whether you can view the Call History of extensions in your company, click one of the extensions in the **Extension Status** screen. If on the menu that appears, there is an item called **Call History**, you are entitled to view this person's Call History. Click on the **Call History** item. A new screen will appear. You may want to **Close** (click the X button) or **Minimize** (click the _ button) the **Extension Status** screen now. The **Call History** window is described in the next section of this document. Remember, though, that this screen is showing calls from/to the extension you clicked on in the **Extension Status** screen – not calls from/to you.



Setting Callbacks

If you need to speak to someone urgently, but they are on the phone, you can set a callback using SmartConnect. Then, when the extension you wish to speak to puts their phone down, you will be notified immediately via a message on the screen. This enables you to call them as soon as they become available.

To set a callback, simply click the required extension in the list and click **Set callback**. The **Auto callback** window will appear. From here, you can cancel the callback (by clicking **Unset**) or so that you don't forget what you wanted to speak to the person about, you can enter some text in the **Note** box.

You can only set one callback per extension at one time. If you have already set a callback for an extension and you then click on the extension in the **Extension Status** screen, rather than a menu item which reads **Set callback**, there will be a menu item which reads **Show callback**. This enables you to edit the callback that has already been set.

For more information on Callbacks, including how to delete them, see the **To do list** section earlier in this document.

Sending Text Messages

If you have a message for someone, but you don't have time to tell him or her in person or call him or her, you can send him or her an instant text message instead. That way you won't forget to give them the message even if they are out of the office for a couple of days; as the message will be stored on SmartServer until the person logs back into SmartConnect.

To send a SmartConnect user a text message, click their extension in the **Extension Status** and click **Send message**. The **Send text message** window will appear. Here you can enter the message and then click **Send** to send it to the person.

If you are on a telephone call when you send the message, you can automatically send details of the call by putting a checkmark in the **Send current call details** box.

For more information on text messages, please see the **To do list** section earlier in this document.

Picking Up Calls

If someone is ringing an extension in your company, but you know that that extension is unavailable to take the call, you can pick up the call for them by using the **Extension Status** window to click on the extension that is being phoned and then clicking **Pickup call**. This will automatically transfer the call to your extension.

When you close the **Extension Status** screen, its position is saved and the screen will be restored to that position the next time that you open it.

Editing Details

Administrators can edit each extension's details from the **Extension Status** window. To do this, click on the extension that you wish to edit and select **Edit details** from the pop-up menu. The **Contact** screen is shown.

The screenshot shows a window titled "Contact (Demonstration)" with a blue header bar. Below the header are three tabs: "Details" (selected), "Callback", and "Call History". The main area contains several input fields and buttons:

- Ext:** A text box containing "314" with a "Dial" button to its right.
- Name:** A text box containing "Sandra".
- Dept:** A text box containing "Sales".
- Assistant:** A text box containing "00" with a "Dial" button to its right.
- Mobile:** An empty text box with a "Dial" button to its right.
- Absence text:** A large empty text area.
- Buttons:** "Send Message" (bottom right of the main area), "OK" (bottom center), and "Cancel" (bottom right).

From here you can change the extension number, name, department, assistant telephone number, mobile telephone number, and absence text of the extension. You can also click **Dial** to call the extension number, assistant number, or mobile number; and you can click **Send Message** to send a SmartConnect text message to the user.

If you have the right security privileges, you can also use the **Call History** tab to view the extension's call history – just like you can for an ordinary contact in a SmartConnect Address Book.

To save the changes you have made, click the **OK** button. To cancel the changes, click **Cancel**. To delete the extension so that SmartServer no longer monitors it, click **Delete**.

Using Auto-Hide

If you have the **Auto Hide** option turned on, your **Extension Status** screen will automatically slide out from the right hand edge of your monitor whenever you move your mouse to the right-most edge of your monitor. After a few seconds, the **Extension Status** will slide back in again (unless you move it). To find out how to turn this feature on and off, see the Configuration section of this document.

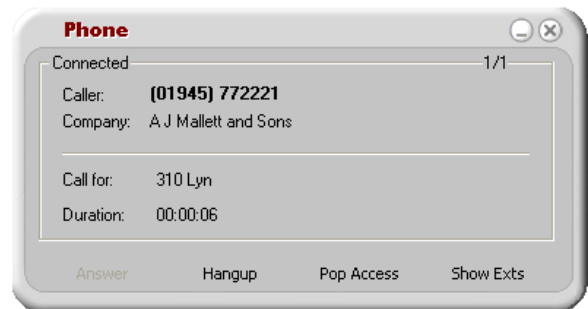
The Phone Window

The **Phone** window can be set to pop up when you make or receive a call, or you can open it normally by selecting it from the SmartConnect tray menu. You can also make the **Phone** window hide when you hang up your telephone. How to set these features will be explained in the **Configuration** section of this manual. The position of the **Phone** window will be saved when you close it.

The main parts of the **Phone** window are the **Called/Call from** and **Caller/Call for** labels. They change depending on whether you are making or receiving a call.

If you are making a call, the name of the person you are calling is shown next to the **Called** label and the name of the company is shown under it (next to the **Company** label). Next to the **Call from** label is your name.

If you are receiving a call, the calling person's telephone number/name will appear next to the **Caller** label. Under it, next to the **Company** label is shown the company this person is associated with. Next to the **Call for** label is the extension number or name called by the caller. This information can be useful because from it you can tell whether the caller has directly dialed your number, or whether the caller has just dialed the main number of your company and your telephone is ringing.



Once the call has been connected (or starts ringing), the **Duration** label will start to count up, showing the number of hours, minutes, and seconds the call has been active for.

If you are on more than one call at a time, you can view information about the active calls by clicking the left and right arrow buttons (<, >) that will be shown towards the top-right of the **Phone** window. These buttons will disappear if you are on one or less telephone calls. When you click the arrow buttons, the information contained in the **Caller**, **Call for**, **Company**, and **Duration** labels will be updated accordingly.

You can also configure up to 8 buttons along the bottom edge of the Phone window. These buttons can be set to perform various actions, including running scripts. For more information, see the Configuration section of this document.

To minimize the **Phone** window, click the **Minimize** button (the first button to the right hand side of the window's title bar: the _ button). When the window needs to pop again, it will re-expand to its last size and position.

To dial from the **Phone** window, you can either type numbers directly onto the window using your keyboard, or you can use Ctrl-V or Shift-Insert to copy text from the clipboard onto the window. When you are ready to dial, press **Return** on your keyboard and the number will be dialed.

You can also dial digits while on a call – for instance, to select menu options in an interactive menu such as a voice mail system. To do this, just type the digits on your keyboard and press the **Enter** key. This feature is not supported on all PBX types.

Call History

The **Call History** window shows recent calls made to/from a given extension. It can show: All calls, Internal calls, External calls, or Missed calls. By default it shows 50 calls of any particular type, but this number can be changed by your administrator.

If you look at the title bar (the blue horizontal bar that has an icon on the left, followed by the title of the window and three buttons on the right) you will see whose Call History you are viewing. The **Call History** screen shows the Date/Time the calls were made, the Type of the call, the Telephone number of the other party involved in the call, the Name of the other party and the call Duration. You can also phone a caller back, show calls in more detail, and show the **Contact Details** screen just like in the **Address Book**.

Filtering Displayed Calls

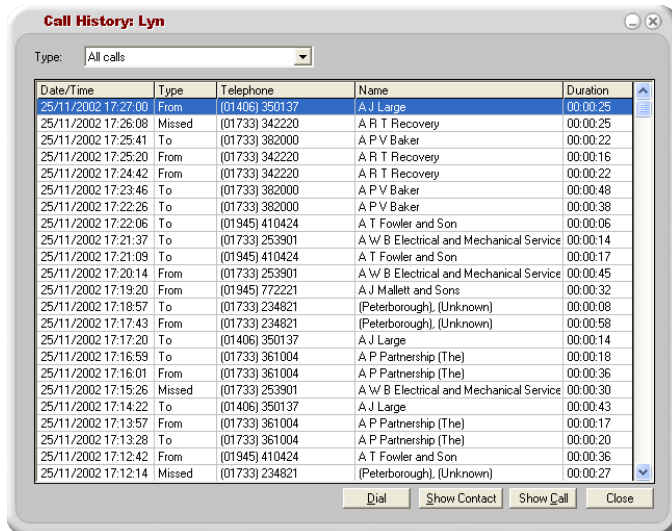
The types of call that can be shown in the Call History window are:

All calls – all telephone calls that this extension made, that made this extension ring, or that this extension answered.

Internal calls – excludes any calls that involved an external line.

External calls – excludes any calls that only involved extensions.

Missed calls – all telephone calls that ended before they were answered.



Call History: Lyn

Type: All calls

Date/Time	Type	Telephone	Name	Duration
25/11/2002 17:27:00	From	(01406) 350137	A.J. Large	00:00:25
25/11/2002 17:26:08	Missed	(01733) 342220	A R T Recovery	00:00:25
25/11/2002 17:25:41	To	(01733) 382000	A P V Baker	00:00:22
25/11/2002 17:25:20	From	(01733) 342220	A R T Recovery	00:00:16
25/11/2002 17:24:42	From	(01733) 342220	A R T Recovery	00:00:22
25/11/2002 17:23:46	To	(01733) 382000	A P V Baker	00:00:48
25/11/2002 17:22:26	To	(01733) 382000	A P V Baker	00:00:38
25/11/2002 17:22:06	To	(01945) 410424	A T Fowler and Son	00:00:06
25/11/2002 17:21:37	To	(01733) 253901	A W B Electrical and Mechanical Service	00:00:14
25/11/2002 17:21:09	To	(01945) 410424	A T Fowler and Son	00:00:17
25/11/2002 17:20:14	From	(01733) 253901	A W B Electrical and Mechanical Service	00:00:45
25/11/2002 17:19:20	From	(01945) 772221	A J Mallett and Sons	00:00:32
25/11/2002 17:18:57	To	(01733) 234821	(Peterborough), (Unknown)	00:00:08
25/11/2002 17:17:43	From	(01733) 234821	(Peterborough), (Unknown)	00:00:58
25/11/2002 17:17:20	To	(01406) 350137	A.J. Large	00:00:14
25/11/2002 17:16:59	To	(01733) 361004	A P Partnership (The)	00:00:18
25/11/2002 17:16:01	From	(01733) 361004	A P Partnership (The)	00:00:36
25/11/2002 17:15:26	Missed	(01733) 253901	A W B Electrical and Mechanical Service	00:00:30
25/11/2002 17:14:22	To	(01406) 350137	A.J. Large	00:00:43
25/11/2002 17:13:57	From	(01733) 361004	A P Partnership (The)	00:00:17
25/11/2002 17:13:28	To	(01733) 361004	A P Partnership (The)	00:00:20
25/11/2002 17:12:42	From	(01945) 410424	A T Fowler and Son	00:00:36
25/11/2002 17:12:14	Missed	(01733) 234821	(Peterborough), (Unknown)	00:00:27

Dial Show Contact Show Call Close

To select which type of calls to view, click the arrow to the right of the **Type** drop-down list. The list of selectable call types will appear. After selecting the one you want, the list of calls will update accordingly. The selection will be saved when you close the screen so that the next time the screen is opened, you won't have to choose from the list again.

Showing a Call

To show a call in more detail, highlight the one you want from the list and click the **Show Call** button. A new window will appear that shows you in more detail who was involved in the call, the time the call was started, the time that it was answered and the time it ended. It also shows other information such as if the call was transferred or put on hold etc. If the call was a conference call, all the parties involved in the call will be shown.

Showing a Contact

To open the **Contact Details** screen (like the one you can open from the **Address Book** screen) click the call with the contact that you want to view and click **Show Contact**. The **Contact Details** screen, which was described earlier, is now opened.

Dialing a Contact

If you wish to call a contact back from the Missed calls list, or for some other reason want to call a number stored in the **Call History** screen, you can do so. Simply select the call that has the required telephone number/contact in it and click the **Dial** button. If the contact has more than one telephone number, clicking **Dial** will not show you a list of numbers to select from. Instead SmartConnect will automatically dial the number that is stored in the Call History.

Resizing the Call History Screen

The **Call History** screen can be resized like an ordinary window by moving the mouse cursor over the border of the window, holding down the left mouse button and dragging the mouse. However, there is a minimum size for the window and once this size has been reached, you will not be able to make the window any smaller. The screen's size and position are remembered when you close and reopen the **Call History** screen.

You can also resize the columns of the grid in the **Call History** screen (so that you can see more or less information). Do this by moving the mouse cursor over the vertical lines that separate two columns (the mouse cursor will change shape when it is in the right position). Now hold down the left mouse button and drag left or right. When the column is at the desired width, let go of the mouse button. The column widths are not saved when you close the **Call History** window.

Configuration

The way to change SmartConnect's settings is by using the **SmartConnect Configuration** screen, accessed by selecting the **Configure** item from SmartConnect's tray menu. This screen has up to seven main sets of options, or tabs.

The first tab, **General**, allows you to change your user details like name, extension number etc.

The **Interface** tab allows you to change the way the **Extension Status** appears, and the way the **Phone** window behaves when you make and receive calls.

The **Buttons** tab lets you configure buttons for use in SmartConnect.

The **Address Books** tab lets you select which Plugins to use.

The **Absence** tab allows you to configure your absence text.

The **Speed Dials** tab is what you use to set up your speed dials.

The **Advanced** tab is used to configure advanced features such as Telephony settings.

General Options

The options configurable from the **General** tab are:

Extension – the extension you are logged in to SmartConnect as.

Name – the name displayed by SmartConnect on the **Extension Status** screen, and when you make internal calls.

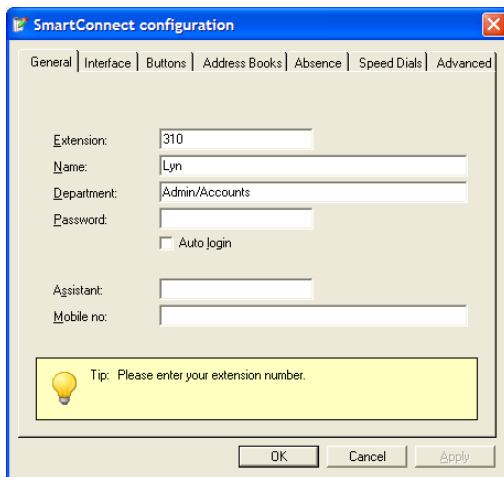
Department – which department column you are shown under on the **Extension Status** screen.

Password – change the password you use to log in to SmartConnect.

Auto login – change the way SmartConnect behaves when it starts.

Assistant – configure your assistant's extension number.

Mobile no – enter your mobile (cellular) telephone number here.



The image shows a screenshot of the 'SmartConnect configuration' dialog box. The title bar reads 'SmartConnect configuration' and includes a close button. The dialog has several tabs: 'General', 'Interface', 'Buttons', 'Address Books', 'Absence', 'Speed Dials', and 'Advanced'. The 'General' tab is selected. The fields are as follows:

- Extension: 310
- Name: Lyn
- Department: Admin/Accounts
- Password: (empty)
- Auto login:
- Assistant: (empty)
- Mobile no: (empty)

At the bottom, there is a yellow tip box with a lightbulb icon that says 'Tip: Please enter your extension number.' Below the tip box are three buttons: 'OK', 'Cancel', and 'Apply'.

Extension

Entering a different extension number in this box will change whose settings and privileges you use when you use SmartConnect as well as which telephone extension to dial from and show the **Phone** screen for. For instance, if you are a supervisor and you have certain privileges, like being able to view others Call Histories, you may want to access these privileges from a different computer than the one you usually use. To do this, just start SmartConnect on the computer you want to use and change the number in the **Extension** box to your extension number. To use the new **Extension** setting, click **OK**. The Login screen will then appear to confirm that you want to change user and to load all of the new extension's preferences.

Name

If you change the text in this box, the name that is shown next to your extension on the **Extension Status** screen will be changed, as well as the name shown to other SmartConnect users when you call them.

Department

If you change the text in this box, your extension will appear under a different department on the **Extension Status** screen. If you enter a department in this box that does not already exist on the **Extension Status** screen, a new one will be created. You may not be able to change the department you appear under.

Password

If you use a password to access SmartConnect, it will appear in this box, but the actual letters will be replaced with asterisks (*).

If you want to change your SmartConnect password, simply replace the contents of the **Password** box with your chosen new password.

If you do not use a password to access SmartConnect, but would like to, enter the password you would like to use in the **Password** box.

If you currently use a password to access SmartConnect, but do not want to use one anymore, delete the contents of the **Password** box.

The changes to the **Password** setting will be saved when you click **OK** or **Apply**. They will take effect the next time you start SmartConnect.

Auto login

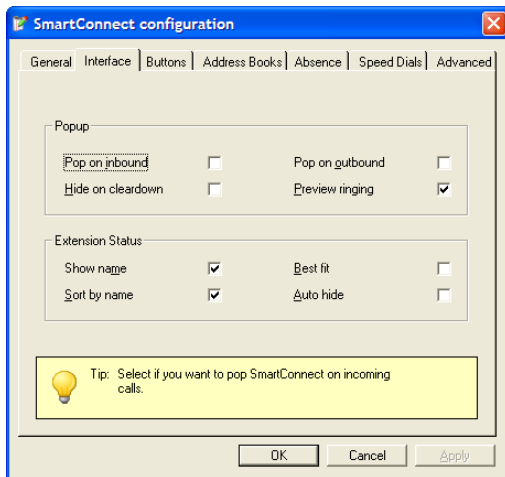
The **Auto login** check box enables you to decide whether or not SmartConnect will ask you to enter an extension number when it is started.

If you place a checkmark in this box (by clicking on it), you will not be prompted to enter your extension number and password when SmartConnect is started on your computer (and, where applicable, when you are logged in to Windows).

If this box is cleared (no checkmark), you will be prompted to enter your extension number and password every time SmartConnect is started.

Interface Options

The options on this tab affect the way the **Phone** window appears and disappears when you make and receive telephone calls. Also from this tab, you can make changes to the way the **Extension Status** appears. When you have finished making changes, just click **OK** or **Apply** and the new settings will take effect.



Pop on inbound

If you place a checkmark in this box (done by clicking inside the white area), the **Phone** window will “pop” or appear every time your extension starts ringing. When the **Phone** window pops, it appears above all the other windows on your desktop. Most people prefer to have this setting turned on so that they can identify who is calling before answering the telephone. The default setting is to not pop on inbound.

Pop on outbound

If you place a checkmark in this box, the **Phone** window will pop every time you lift your telephone handset or make a call (e.g. from the **Address Book**). Some people prefer this setting to be turned off. It is off by default.

Hide on cleardown

Placing a checkmark in this box causes the **Phone** window to disappear when you replace your handset or end your current call. The default setting is off (do not hide on cleardown).

Preview ringing

Check this option to make SmartConnect show a discreet window at the bottom of your screen when you make or receive a phone call, telling you the name and number of the caller. This window is smaller than the **Phone** window and some people prefer to use it instead of **Pop on inbound** because they can carry on working and typing without being too distracted by incoming phone calls. The default setting is to not use the **Preview ringing** window.

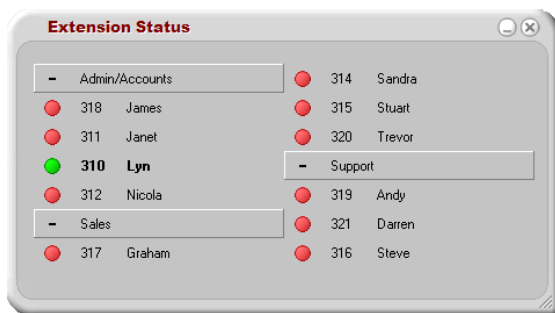
By default, the **Preview** window appears at the left-most corner of your monitor, however you can move it where you want by holding down your left mouse button over its top edge and dragging the window. The next time the window pops, it will appear in this new position, but still on the bottom of your screen.

Show name

Check this to have the **Extension Status** screen display the name of the extension next to their number. Operators may leave this turned off to save space if they have many extensions displayed on their **Extension Status**.

Best fit

When this option is selected, the **Extension Status** screen will automatically size itself with each department having all of the extensions belonging to that department in one column. If a user tries to resize the **Extension Status**, it will simply jump back to its original size. This can lead to wasted space, especially if you have many extensions in one department, and only two or three in another.



Having this option unselected means that you can resize the **Extension Status** to the height and width you would like it. The extensions will automatically rearrange themselves into flowing columns and the window will be just the right size.

Sort by name

When this option is selected, the Extension Status will be sorted by names (within departments). With this option unselected, the extensions in each department will be listed sorted by extension number.

Auto hide

When this option is ticked, the **Extension Status** window will automatically slide out from the right hand edge of your monitor screen whenever you move your mouse over to the rightmost edge. After a few seconds, the **Extension Status** will slide back in. This can be a timesaver if you often need to check the status of extensions, for you can do so without having to click or press anything – just move your mouse.

Buttons

The options on this tab are so that you can choose to have 0, 4, or 8 buttons along the bottom of the **Phone** window.

Choose the number of buttons to use by selecting **None**, **4**, or **8** from the **Style** dropdown list.

In the button grid, double-click the button you want to change (or highlight it and click **Edit**). The **Edit Button** window will appear. From here, select a button type, a name for the button, and any additional options needed and click **OK**. The changes to the button will be saved and will take effect as soon as you exit the **SmartConnect Configuration** screen.

The Preview button is the button that appears on the small **Preview** window that pops up if you have the **Preview ringing** option enabled. You can click on this button to perform the task of your choice.

The buttons in the list are numbered left to right, top to bottom. If you have 4 buttons, there will be one row of four buttons in it. If you select 8 buttons, there will be two rows with four buttons in each row.

System administrators may set up all users' buttons the same using the SmartServer Configuration program.

The available button types are enumerated in the section of this document entitled *Getting More Out Of SmartConnect*.

Address Books

This tab lets you configure address book settings. You can select which address book to add new contacts to by selecting an address book from the **New contacts** dropdown list.

There is also a list showing all the address books set up on SmartServer. If you want to use local integration functionality with an address book, place a tick in its checkbox. This will allow you to perform actions like adding contacts to the address book, or popping records in the external address book application.

You can also use the **Add**, **Remove**, and **Configure** buttons to edit private address books. For more information please see the *Getting More Out Of SmartPhone* section.

Absence Text

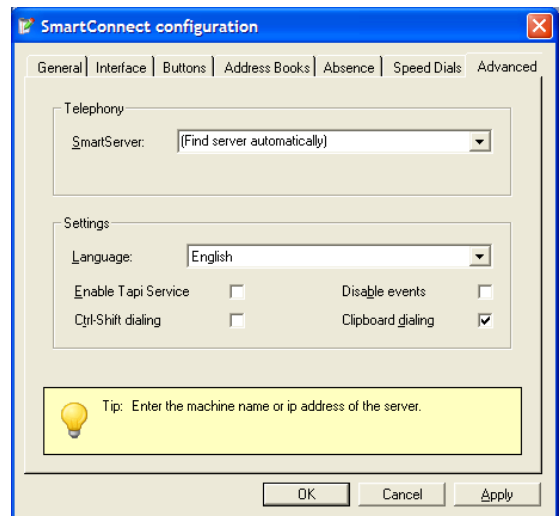
The **Absence** tab configures exactly the same settings as clicking **Set absence text** from the SmartConnect tray menu. To turn absence text on, put a checkmark in the **Use absence text** checkbox. To change your absence text, edit the text in the box. For more information, see earlier in this document.

Speed Dials

To add a speed dial to your personal list, click the **Add** button and fill in the **Caption** and **Telephone** fields, then click **OK**. To edit a speed dial, highlight it and click **Edit**. To remove a speed dial from the list, highlight it and click the **Remove** button. After you have edited a speed dial, you may be asked to log in again before the new list is used by SmartPhone.

Advanced Options

The options on this tab are for setting advanced options, and should never need to be changed once SmartConnect is installed and operating correctly.



SmartServer

This option enables you to manually tell SmartConnect where the SmartServer machine is located. Enter an IP address, Net BIOS machine name, or select **(Find server automatically)**.

When set to **(Find server automatically)**, SmartConnect will explore the network in an attempt to find the SmartServer machine by itself every time you start SmartConnect. However, if you have a modem device in your computer, if your computer is multi-homed, if you have a firewall that blocks UDP IP traffic, or if for some reason you have more than one instance of SmartServer running on the network, you will need to tell SmartConnect which machine to connect to.

If SmartConnect cannot find an instance of SmartServer to login to, it will sit quietly in the system tray area and its icon will stay grayed out. It will continue to attempt to connect to SmartServer once every minute until it succeeds. This is useful for laptop computers because they may not be permanently connected to a network.

The default setting is **(Find server automatically)**.

Language

From this dropdown list, you can select which language to display SmartConnect and all other Smart CTI products in. The list of languages available always includes English and whichever other languages you have installed. To get more SmartConnect language packs, please ask your dealer or visit our website.

Enable TAPI Service

Check this box to automatically install and enable the SmartTSP telephony service provider, which enables you to dial through SmartConnect from any TAPI enabled application just by clicking the application's **Dial** button.

Uncheck this box to remove the SmartTSP from your system. The default setting for this option is enabled (use SmartTSP).

Disable events

To turn off any event-driven scripts, select this option. The default setting for this option is disabled (events enabled).

Ctrl-Shift dialing

If you want, you can turn on screen reading. This is an easy way to dial from most databases. When this option is enabled, all you need to do to dial a telephone number that is displayed on screen is move your mouse over the telephone number and hold down the **Control** and **Shift** keys on your keyboard.

SmartConnect will read the telephone number that your mouse is over, try and match it to a contact in one of your address books, and display a ToolTip-like window with telephone number and contact name. All you then need to do to dial the number is click on the little yellow window. You don't have to highlight the number you want to dial, and you don't need to perform any complicated Copy & Paste actions.

Clipboard dialing

With this option turned on, if you highlight a telephone number in a database text field or a document, a new item will appear in the SmartConnect tray menu (accessed by clicking the SmartConnect icon near the clock in the bottom right of your computer screen). Clicking on the new menu item will enable you to dial the telephone number you highlighted. This works in Microsoft Internet Explorer web pages and Adobe Reader documents as well as Notepad, WordPad, and many other applications.



Section Three

Getting More Out Of SmartConnect

Getting More Out Of SmartConnect

Introduction

This document will guide you through the advanced features of SmartConnect, showing you how you can get more out of it, like dialing using TAPI and using the SmartCmd program.

Also available are: (i) a Quick-Start guide; (ii) a user manual; (iii) an FAQ that answers common questions posed by SmartConnect users; and (iv) an installation/uninstallation guide that talks you through installing SmartConnect on your computer. If you do not have these, please visit the Oak Telecom web site: www.oak.co.uk

This document has six sections:

Programmable buttons – talks about the buttons available for the **Phone** window.

Using SmartCmd – tells you what SmartCmd is and how to use it.

15 ways to dial using SmartConnect – shows you how you can use SmartTSP to dial from TAPI enabled applications

Keeping SmartConnect up-to-date – explains how clients are kept running on the latest version of SmartConnect.

Using private Address Books – guides you through the process of setting up and using private address books in SmartConnect.

Plugin Actions – all about the actions that can be done with the various Address Book Plugins.

Programmable buttons

The **Phone** window of SmartConnect can be pre-configured on a per-user basis to display 0, 4, or 8 buttons along the bottom edge. You can set these buttons using the SmartServer Configuration application or from the **SmartConnect Configuration** screen. To find out how to set up buttons, refer to the appropriate section of either the SmartConnect User Manual or the SmartServer Configuration Guide. This document merely explains the types of buttons available.

The types of button available for most telephone systems are:

Name	Options	Description
Answer	None	Answers your telephone and puts it in speakerphone mode. Only works when your phone is ringing.
Answer/Hangup	None	If your phone is ringing, it acts like an Answer button. If your phone has an active call, it acts like a Hangup button. If you have a call on hold, pending transfer, the button will read Cancel and pressing it will cancel the transfer and return you to the held caller.
Conference	None	Makes a conference between your extension, the active call, and the call that is currently "on hold pending transfer" at your extension.
Deflect Call	Ext Number	Deflects an incoming call to the specified extension.
Dial Clipboard	None	Dials a telephone number that has been copied to the clipboard.
Extension	Ext Number	Shows the status of the specified extension. Clicking it brings up the same context-menu you would see on the Extension Status screen.
Hangup	None	Ends the currently active call (if there is one). Produces the same effect as replacing your handset.

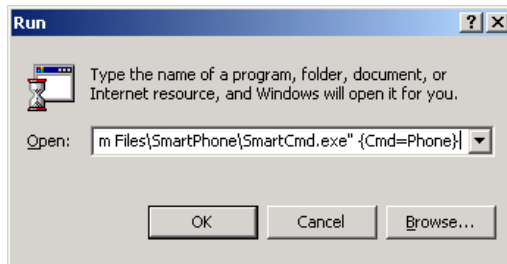
Hold/Unhold	None	If you have an active call, clicking this will put the other party on hold. If the active call is held, clicking this will retrieve the call. If there is a call on hold, pending transfer, the button will read Complete and pressing it will complete the transfer, putting the call through to the other party.
Reconnect	None	When a call is on hold pending transfer, pressing this will reconnect you with the on-hold party. This is the same as the Cancel state of the Answer/Hangup button.
Set Callback	None	Sets a callback on the called extension. This is not a SmartConnect Callback. This is a telephone system callback.
Set Result	Call types, Results	Enables you to mark a call as having a specific type and result. Enter a comma-delimited list of call types in the Call types box and a comma-delimited list of possible results in the Results box. This is only useful for statistics gathering purposes.
Show Address Book	None	Clicking this displays the Address Book screen.
Show Call History	None	Clicking this displays your personal Call History .
Show Contact	None	Shows the Contact Details screen for the contact involved in the current call.
Show Extensions	None	Displays the Extension Status screen.
Show Phone	None	Displays the Phone window (this is the default action for the Preview button).
Show Todo	None	Displays the logged in user's To do list .
Speed Dial	Number	Dials the predefined number at the click of a button.
Transfer	None	Completes a consultation transfer. Same as the Complete state of the Hold/Unhold button.

As well as choosing a button type and any options, you can change the name displayed on the **Phone** window on a per-button basis. For instance, you could have 2 speed dial buttons set up to dial different numbers and have one named "Jim Mobile" and the other named "Jim Home".

Using SmartCmd

SmartCmd is a small utility that you can use to gain quick access to frequently used SmartConnect features.

To do this, use the SmartCmd utility in conjunction with one of a number of command line parameters. For example, from the **Start/Run** dialog box, you would enter the SmartConnect path, followed by **SmartCmd.exe** **{<parameters>}**.



You would normally create a shortcut to SmartCmd with those parameters and assign a hotkey to the shortcut so that you can perform the action automatically. This will be discussed later.

SmartCmd Syntax

The parameters used by SmartCmd are:

{Cmd=<command>}
[Options]

The **Cmd** parameter is always included, but the **Options** parameters are only used by certain commands. The commands that can be used with SmartCmd are listed below.

The syntax for the following commands is **{Cmd=<command>}**:

AB	Displays the Address Book window. You can also use Show Address Book .
Absence	Shows the Set absence text screen to allow user to edit absence text.
BLF	Displays the Extension Status . You can also use Show Extensions .
Tray	Displays the SmartConnect tray menu.
CallLog	Displays your Call History . You may also use Show Call History or ShowLog .
ShowContact	Displays the Contact Details screen for the contact involved in the current call. Alternatively, use Show Contact .
Config	Displays the Configuration window. Or use Show Config .
Phone	Displays the Phone window. You can also use Show Phone .
Todo	Displays the logged in extension's To do list screen. Another way to this is to use Show Todo .
Unload	Exits SmartConnect.

The syntax for the following commands is **{Cmd=<command>}{Tel=<number>}**:

Dial	Dials an external telephone number as specified by <number> . You can also use MakeCall .
TAPIDial	Dial the telephone number specified by <number> but performs a special action such as start a transfer or conference call if there is already an active call on the local extension.
TPSDial	Makes a call to the specified telephone number from the local extension, even if the telephone number is in the TPS list.

The syntax for the following commands is
{Cmd=<command>}{Ext=<extension>}:

ExtACB	If the logged in user already has a SmartConnect Callback set on <extension> , this will display the Callback. Otherwise, this will allow a user to set a Callback.
ExtConsult	Perform an announced or supervised transfer to extension <extension> .
ExtDial	Dial the extension specified by <extension> .
ExtEdit	Show the Contact Details screen of the specified extension.
ExtLog	Display the Call History of extension <extension> .
ExtPickup	Answers the call that is ringing at the specified extension.
ExtXfer	Perform a blind transfer of the current call to extension <extension> .

The syntax for the following commands is
{Cmd=<command>}{CallId=<callid>}:

Answer	Answers the ringing call specified by <callid> .
Hangup	Hangs up the call specified by <callid> .
Hold	Puts the call specified by <callid> on hold.
Unhold	Takes the call specified by <callid> off hold.

Miscellaneous Commands

Syntax:	{Cmd=Button}{Index=<index>}
Description:	Simulates pressing one of the user's Phone window buttons, or the Preview window button. To specify the Preview window button, use an index of -1 . Or use a number from 0 to 7 to specify a Phone window button. The buttons are numbered from left to right, and top to bottom. So the button in the bottom-left corner of the Phone window would be button number 4.

Syntax: **{Cmd=Consult}{CallId=<callid>}{Tel=<number>}**
 Description: Begin a supervised transfer from the call with the specified id to the specified telephone number.

Syntax: **{Cmd=Deflect}{CallId=<id>}{Destination=<tel>}**
 Description: Deflects the specified call that is ringing at the local extension to the specified telephone number. If **<id>** is not present, it will deflect the "active" call (that is, the call that would have been answered if you picked up your handset).

Syntax: **{Cmd=ExtText}{Date=<date>}{Ext=<ext>}{Text=<text>}[{Display=<display> }]**
 Description: Sends a SmartConnect text message to the extension specified by **<ext>**. The text of the message will be as specified in **<text>**. If **<display>** is specified, that is the name that will appear in the **To** box. If **<display>** is not specified, the receiving user's extension number will appear in the **To** box. Use **<date>** to specify the date and time on which the message was sent. When this command is executed, the **Send text message** window will appear, requiring the user who initiated the action to either **Send** or **Cancel** the message.

Syntax: **{Cmd=Feature}{Code=<featurecode>}{Feature=<featurename>}**
 Description: Make SmartConnect dial a telephone system feature-code. You need only to specify **<featurecode>** or **<featurename>**. If you specify **<featurecode>**, use the exact code you would dial on the telephone system. If you specify **<featurename>**, you can use the "friendly" name of the feature. For more information on feature codes, see the SmartConnect User Manual.
 Feature names: ADVISEON, ADVISEOFF, CALLWAITON, CALLWAITOFF, DOOROPEN, DNDON, DNDOFF, FWDALL, FWDOFF, GROUPPICKUP, HUNTJOIN, HUNTLEAVE, MESSAGEON, MESSAGEOFF, MONITOR, NIGHTON, NIGHTOFF, PAGE, RESET, SUPPRESSON, SUPPRESSOFF

Syntax: **{Cmd=Pickup}{CallId=<callid>}{Ext=<extn>}**
 Description: Picks up the specified call that is ringing the specified extension number.

- Syntax: **{Cmd=Reconnect}{ActiveId=<call1>}{CallId=<call2>}**
- Description: This will cancel the supervised transfer that was set up for the call with id <call2>. You can also use **{Cmd=TransferCancel}** instead of **Reconnect**.
- Syntax: **{Cmd=RunScript}{Script=<scriptname>}[{Params=<params>}] [{Values=<vals>}]**
- Description: Runs the script named <scriptname>. You may optionally specify parameters and values for the parameters.
- Syntax: **{Cmd=SetResult}{CallId=<callid>}{Call Type=<calltype>}{Result=<result>}**
- Description: Marks the call whose CallId is as specified with the call type specified by <calltype> and the result specified by <result>.
- Syntax: **{Cmd=SetSpeedDial}{Index=<index>}{Caption=<caption>}{Telephone=<telephone>}**
- Description: Edits the speed dial with the specified index. If <index> is set to -1, adds a new speed dial to the list. Only works when the **SmartConnect configuration** window is not open.
- Syntax: **{Cmd=ShowMsg}{Id=<msgid>}**
- Description: Displays the SmartConnect text message with the given id number.
- Syntax: **{Cmd=Transfer}{CallId=<callid>}{Tel=<number>}**
- Description: Performs a blind transfer of the call specified by <callid> to the number specified by <number>.
- Syntax: **{Cmd=TransferComplete}{ActiveId=<call1>}{CallId=<call2>}**
- Description: Completes the transfer that was set up for the call with id <call2>. This function will merge together the two parties from the calls with id's <call2> and <call1>.

Creating Shortcuts

To create a SmartCmd shortcut that shows the **Extension Status** when you press the **F12** key on your keyboard, follow the instructions below:

1. Right-click on your desktop, point at **New**, and select **Shortcut**.
2. Type the full path, or Browse, to **SmartCmd.exe**. Insert **{Cmd=BLF}** at the end of the path string.
3. Click **Next >**. Enter a descriptive name for the shortcut e.g. **Show Extensions** and click **Finish**.
4. To assign a hotkey to the new shortcut, right-click it and select **Properties** from the menu.
5. Click inside the **Shortcut key** box and press **F12** on your keyboard.
6. Click **OK**. You can test your hotkey by pressing **F12**. The **Extension Status** screen should appear.
7. If you wish, you may move the shortcut onto the Start Menu, or you can leave it on your desktop.

NB: When creating a shortcut to SmartCmd, be sure to put double-quotes around the path, but not around the parameters.

If, during Step 5, when you push a key on your keyboard, the key you pushed does not appear in the **Shortcut key** box, it is because that key assignment is already in use (or cannot be used). Try pushing the same key with a different combination of **Ctrl**, **Alt**, and **Shift**.

You may have to reboot your machine before the hotkey works.

You may only keep the shortcut on your desktop or somewhere on the Start menu. If you keep it anywhere else, the hotkey will not work correctly.

15 ways to dial using SmartConnect

As well as making calls manually from your telephone handset, SmartConnect has over 15 other ways to allow you to make calls. Described below are 15 of the most popular ways you can make calls from SmartConnect.

Last Number Redial

SmartConnect remembers the last 10 contacts that you called, received a call from, or missed a call from while you were logged in to SmartConnect.

To quickly dial one of these numbers back, just bring up the tray menu, point to **Last Number Redial** and select the one you want to dial.

Speed Dials

Each user of SmartConnect has a personal speed dial list. This is a list of names with telephone numbers that you can call by simply pointing to **Speed Dial** on the tray menu and clicking the number.

You can set up your own speed dial list by going to the **Speed Dials** tab of the **SmartConnect configuration** window. Use the **Add** button to add a speed dial, the **Remove** button to remove a speed dial, and the **Edit** button to edit a speed dial.

Call History

You can dial from the Call History window too. Just highlight the line that contains the contact you want to dial and click the **Dial** button.

Extension Status

To call an extension on your extension status screen, you simply have to click on the person and select **Dial** from the menu that pops up. You can also start a consultation or blind transfer in a similar way if you are already on a call.

Address Book

To dial from the address book, you first need to search for a contact. When you have found your contact, highlight them in the results grid and click the **Dial** button. If the contact has more than 1 telephone number stored against them, a menu will pop up to allow you to choose the correct number to dial.

Contact Card

You can also dial from a contact's Contact Card. Contact Cards can be found in various parts of SmartConnect for instance by highlighting a contact on the Address Book window's results grid and clicking the **Show** button, or by clicking **Show Contact** on the Call History screen, or by clicking **Edit details** on the Extension Status window.

To dial from the Contact Card, you just have to click the **Dial** button that is next to the number you want to dial.

Type in Phone window

You can dial a number by simply typing in the **Phone** window and then pressing the **Enter** key. Just like you would while dialing from your telephone handset, except when you dial from your handset, you can't correct mistakes by simply pressing the delete key.

Paste in Phone window

The **Phone** window also allows you to paste telephone numbers into it by pressing the Ctrl-V or Shift-Insert shortcut keys and then pressing the Enter key. So you can copy a telephone number to the clipboard and then dial it easily.

Screen Reading

If you have **Ctrl-Shift dialing** checked on the **Advanced** tab of the **SmartConnect configuration** window, you can hold down the Control and Shift keys on your keyboard and move your mouse over a text field in most databases, and SmartConnect will intelligently read any telephone number contained in that

text field and display a little popup window allowing you to quickly dial the number.

Highlight Dial or Clipboard Dial

If you have **Clipboard dialing** checked on the **Advanced** tab of the **SmartConnect configuration** window, you can simply highlight a telephone number in your favorite application and bring up the SmartConnect tray menu. There will be a new item at the top which you can click to dial the number. This method works from almost all applications that use the Windows Clipboard. Unfortunately, Microsoft Office XP and 2003 do not use the Windows Clipboard so this method will not work with those applications.

SmartTSP and TAPI

TAPI stands for Telephony Application Programming Interface. A TAPI enabled application is one that supports the use of TAPI. Examples of TAPI enabled applications are Novell GroupWise Address Book and Microsoft Outlook. If you can use your application to make telephone calls (e.g. if it has a Dial button or menu item), it is probably TAPI compliant.

You would normally need a modem attached to your computer and plugged into an analogue phone line to make use of this feature. Most computers that you would find in your company would not normally have a modem so this feature of programs becomes somewhat useless.

SmartTSP is a simple Telephony Service Provider. This means that you can use it in conjunction with SmartConnect and the telephone on your desk to make calls with TAPI enabled applications – without the need for a modem.

The current version of SmartTSP is supported when used on Windows 2000, XP, and NT4; at present it is not officially supported when used on Windows 95/98/ME or any operating system newer than Windows XP although there should be no problems with using the SmartTSP on newer operating systems.

To turn the SmartTSP on, you should be able to simply go into the **SmartConnect Configuration** window, click on the **Interface** tab, and place a checkmark in the

Enable Tapi box. However, if this doesn't work, you may need to manually enable the SmartTSP.

To manually configure your PC to use SmartTSP, please contact Oak Telecom who will be happy to advise you of what needs to be done.

Your computer may need rebooting after enabling or disabling SmartTSP.

SmartCmd

Running SmartCmd.exe with the right command line arguments, you can make calls from other applications such as Access or from your own programs, or you can create shortcuts that you can place on your desktop or in your start menu or your quick launch toolbar. For information on the syntax required, please see the **Using SmartCmd** part of this document.

DDE

DDE stands for Dynamic Data Exchange and a lot of programming languages such as Visual Basic and Delphi let you use it to communicate with other applications. You can also use DDE from some database packages.

Using DDE calls you can make SmartConnect make a phone call. Simply start a DDE conversation with the **SmartCmd** application, with a topic of **System**. Then issue a command containing the telephone number you want to dial. SmartConnect will place a call to the telephone number, automatically formatting it correctly and filling in the trunk access code if needed etc.

Dial hyperlinks

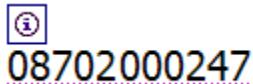
You are probably familiar with hyperlinks in web pages that allow you to visit other pages or send an email. If you have SmartConnect installed, you can also turn telephone numbers into hyperlinks meaning you can dial them just by clicking. This works anywhere where HTML is used – such as web browsers (Internet Explorer, Mozilla, etc), in Outlook HTML messages, and on your Active Desktop.

To turn a telephone number into a hyperlink that will make a call, use the following syntax:

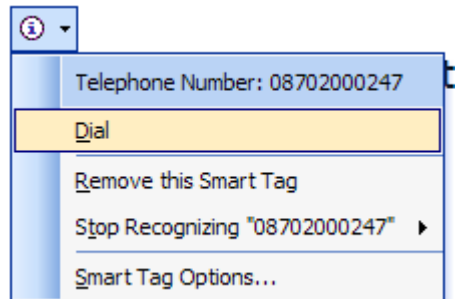
12345 where **12345** is the telephone number. Or in Outlook when you are editing an HTML email message, just type **dial:12345**.

Microsoft Office Smart Tags

If you have Microsoft Office XP or newer, SmartConnect will install a Smart Tag which will make any telephone number you type in Word, Excel, or Outlook able to be dialed with a click. To start using this feature, go to the AutoCorrect options window (from the Tools menu) in any Microsoft Office application, go to the **Smart Tags** tab, and make sure there is a tick against the Telephone Number tag. Then after clicking **OK**, restart all Office applications.

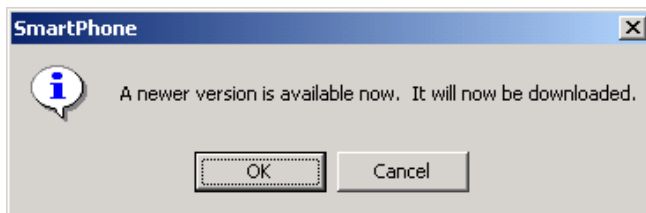


Now, whenever you type a telephone number, Office will recognize it and give it a red dotted underline (see the picture above). When you hover over the number, a box will appear which you can click on to display a new context menu (see the picture below). From the context menu, select **Dial** to place a call to the number.



Keeping SmartConnect Up-to-date

To ensure that keeping all the clients running the same version of SmartConnect is easy, your system administrator may have set up SmartServer to automatically send updates of SmartConnect to your computer when you load up SmartConnect. If this is the case, and you are running an outdated version of the client software, when SmartConnect loads, you will be informed that a newer version is available and you will be prompted to download it. Clicking **OK** will copy the new version to your machine from the SmartServer machine and restart SmartConnect. Clicking **Cancel** will delay updating to the new version. You should only click **Cancel** if you have been specifically told not to update by your system administrator.



NB: Neither SmartServer nor SmartConnect connect to the Internet to download updates of SmartConnect. Your system administrator obtains them from an authorized Oak Telecom distribution point and they are stored on one of your company's file servers.

For information on setting up SmartServer to send SmartConnect updates to clients, please review your SmartServer Documentation, in the SmartServer Configuration Guide section.

Using Private Address Books

As well as Public (or global) Address Books which all users share and can view and pop, SmartConnect also has the ability to use Private (or personal) Address Books.

A Private Address Book runs locally on the user's machine and the data is only visible to the user it is configured for, so they are useful for sales staff to keep their own personal leads in. An example of a Private Address Book source might be a user's Outlook Contacts list.

Each user can have a maximum of 4 Private Address Books. To set one up, bring up the **SmartConnect configuration** window by selecting **Configure** from the SmartConnect tray menu and then go to the Address Books tab. Click the **Add** button and the **Private Address Book** options window will appear.

To edit a previously defined Private Address Book, highlight it from the list on the **SmartConnect configuration** window and click the **Edit** button. This will display the **Private Address Book** options window.

On the **Private Address Book** options window, select the type of data that you want to link to from the **Type** dropdown list. Then click **Configure** to configure the specific settings for that address book type. For more information on the specific settings for each address book type, see the next section of this document entitled Plugin Actions.

You can enter a descriptive name for the address book in the **Name** box and use the **Alpha directory** dropdown list to select whether the address book will be indexed on the **Address Book** window.

When you are finished configuring your private address book, click **OK**. You will need to reload SmartConnect now before your new address book will be used. Select **Unload SmartConnect** from the tray menu and then load SmartConnect back up by clicking **Start**, going to the **Programs** menu, and then **SmartConnect**.

Plugin Actions

If you have an address book set up in SmartServer, or a private address book set up for your extension, you can set up a special type of button on the **Phone** window to perform a Plugin action. The actions available vary from address book to address book, but typically are used to control the external application that the address book's data comes from. For instance, you might be able to pop the current contact's record in the application, or create a new contact record, or log a call against the contact etc.

This section will go through the different types of Plugins and all the actions that can be performed with each. For more information on how to set up a button, see the Programmable buttons section earlier in this document and review the Configuration section of the SmartConnect User Guide.

All of the Plugins are installed automatically for you when SmartConnect is installed.

ACT! Actions

Show contact

This shows the current contact's record in ACT!

Show contact window

This shows the contact window at the tab selected in the **Tab** dropdown; one of: **Contacts, Contacts – Notes, Contacts – Activities, Contacts – Sales, Contacts – Groups, Contact list, Calendar day, Calendar week, Calendar month, Task list, Groups, Email, or Minicalendar.**



Add contact item

This adds an item to the current contact. The type of item to be added is specified in the **Item** dropdown list from one of the following: **Duplicate contact, Schedule call, Schedule meeting, Schedule todo, Insert note, Record history, Group membership, Email addresses, Write email, New sales opportunity, or Edit accounting link.**

Play macro

This plays the specified ACT! macro. The macro name to run should be entered in the **Macro** textbox.

ACT! Professional Actions

Show contact

This shows the current contact's record in ACT!

Show contact in list

This highlights the current contact in the contact list

Add contact history item

This adds an item to the current contact's history in ACT!

New contact

This creates a new contact in ACT! with the current SmartConnect contact's telephone number.

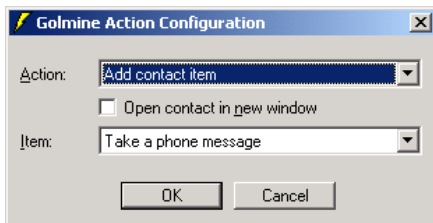
Goldmine Actions

Show contact

This will display the current contact's record in Goldmine. If you check the **Open contact in new window** checkbox, the contact will be displayed in a new window, rather than reusing the current contact window (if there is one).

New contact

This will show the new contact window in Goldmine and automatically fill in the Phone field with the current telephone number (if there is one). If you check the **Open contact in new window** checkbox, a new window will be opened for you to enter the contact details in.



Show contact tab

This will open the current contact's record in Goldmine and show a specific tab of the window – you can choose from: **Summary, Fields, Notes, Contacts,**

Details, Referrals, Pending, History, Links, Members, Tracks, or Opportunities. If you check the **Open contact in new window** checkbox, the contact will be displayed in a new window, rather than reusing the current contact window (if there is one).

Add contact item

This shows the current contact's record and enables you to add an item to it. The actions you can perform are: **Take a phone message, Assign a process, Telemarketing script, Schedule call, Schedule next action, Schedule appointment, Complete sale, Create opportunity, Add referral, and Add contact.**

Show contact list

This shows the **Contact Listing** window in Goldmine and highlights the current contact (if there is one).

Show calendar

This shows the calendar window in Goldmine.

Show activity list

This shows the activity list (the **Open Activities** window) in Goldmine.

Play macro

This makes Goldmine run the macro specified in the **Macro** textbox.

Lotus Notes Actions

Show contact

This shows the current contact's record in Lotus Notes

New contact

This adds a new contact to Lotus Notes and automatically fills in the telephone number field.

Maximizer Actions

Show contact

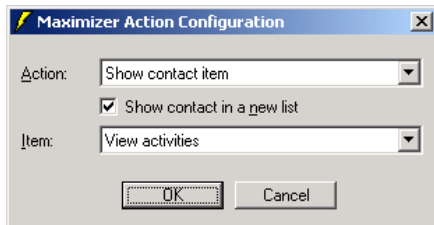
This will show the current contact's record in Maximizer. If you check the **Show contact in a new list** checkbox, the contact will be shown in a new list rather than replacing the current list (if there is one).

New contact

This will create a new contact record in Maximizer.

Show contact item

This will show a specific item related to a contact. If you check the **Show contact in a new list** checkbox, the contact and item will be shown in a new list rather than replacing the current list (if there is one).



Select which item to show from the **Item** dropdown list. You can select from: **View activities, View phone log, Create opportunity, Receive a call, Schedule a meeting, Schedule a call, Schedule a todo, and Write an email.**

Activate window

This will activate and display the Maximizer window you select from the **Window** dropdown list. The windows that you can choose from are: **Calendar, Address book, Hotlist, Opportunities, Journal, Expenses, Freetime, Email, and Marketing library.**

Run macro

This runs a Maximizer macro. The name of the macro that you would like run should be entered in the **Macro** textbox.

Microsoft Access Actions

Show form in edit mode

This opens the form specified in **Form**, moves to the current contact's record, and allows the data to be edited.

Show form in add mode

This opens the form specified in **Form**, creates a new record, and fills in the current telephone number.

Show table in browse mode

This highlights the current contact's record in the table that the contact came from.

Run macro

This runs the macro specified in **Macro**.

Run module

This runs the module specified in **Module**.

Microsoft Outlook/Exchange Actions

Show contact

This shows the current contact's record in Outlook.

Create mail message

This creates a new email message to the current contact in Outlook, automatically inserting the contact's email address.

Create appointment

This creates an Outlook appointment with the current contact. You will need to enter the date the appointment is to take place.

New contact

This creates a new Outlook contact based on the current telephone number.

Pegasus Opera II Actions

Show contact

This shows the current contact's record in Opera II.

Show supplier

This shows the current contact as a supplier in Opera II.

Show customer

This shows the current contact as a customer in Opera II.

Show SOP

This shows the sales order processing screen of Opera II.

SuperOffice CRM Version 5 Actions**Show contact**

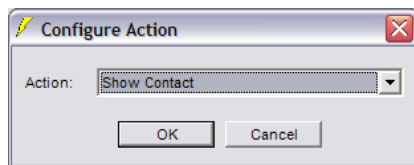
This shows the current contact's record in SuperOffice.

New contact

This creates a new contact in SuperOffice and automatically fills in the telephone number field.

Microsoft CRM Actions**Show contact**

This shows the current contact's record, whether it is a contact, an account, or a lead.

**New contact**

This creates a new contact in Microsoft CRM.

New account

This creates a new account in Microsoft CRM.

New lead

This creates a new lead in Microsoft CRM.