SmartConnect

Quick-Start Guide

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This guide will show you quickly and simply how to get started using your new SmartConnect. After reading through this guide, you will know how to use SmartConnect to help you work more efficiently. Even after you have read this guide, you might still want to keep it handy for future reference.

Loading up SmartConnect

Your SmartConnect will automatically load when you turn on your computer. If for any reason you need to close SmartConnect, or if the auto-start feature has been disabled, you can use the following steps to load it up:

1) Click the **Start** button at the bottom-left corner of your screen.
2) Point your mouse at the **Programs** item, which appears when you click **Start**.
3) Point your mouse at the **SmartConnect** item, which now appears.
4) Click on the **SmartConnect** item.

Logging In

If you have never used SmartConnect on this computer before, a screen will

appear asking you to enter your telephone extension number (and password if supplied). If you check the box that says **Auto-login**, you will not be prompted to give your extension number on this computer again.

NB: If you ever forget your password,

you will have to ask an administrator to change it before you can successfully log on to SmartConnect.

The SmartConnect Status Indicator

When SmartConnect has loaded, an icon will appear in the system tray area (i.e. near the clock at the bottom-right of your screen). This icon is a circle and will be one of four colors depending on the state of your extension:

Green: Your telephone is on the hook.
Red: Your telephone is off the hook.
Flashing Red: Your telephone is ringing.
Gray: Status unknown (This won't happen often. If it does, simply lift and replace the receiver of your telephone and the icon should go green.)

The Main Menu

The way to access all of SmartConnect's features is from the system tray icon. Click on it using your left or right mouse button and a menu will appear. Most items are self-explanatory, but here is a list anyway:

Feature: Quick access to selected telephone features like Do Not Disturb etc.
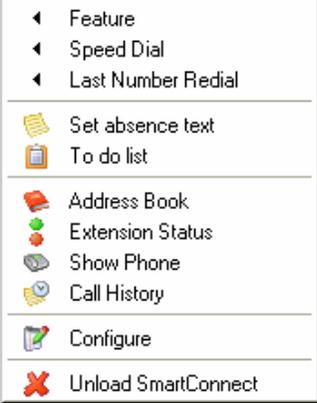
Speed Dial: Stores your personal speed dials list, for quick and easy access to your most common telephone numbers.

Last Number Redial: Remembers the last 10 numbers you received calls from or called so that you can ring back at the click of a button.

Set absence text:	Turn on/off and configure the text to be displayed to SmartConnect users if you are going to be absent.
To do list:	Shows your list of sent and received text messages and callback requests.
Address Book:	Loads your **Address Book**, from which you can phone contacts, view their information, and see a history of when you have been in contact with them.
Extension Status:	Displays the status of all extensions monitored by SmartConnect, and enables you to call; transfer calls to; and consult with other extensions.
Show Phone:	Brings up the **Phone** screen. You can also set this screen to popup when you make/receive a call. You can also set a number of buttons on this screen to do such things as answer, hang-up, hold, speed dial etc.
Call History:	Shows a list of the last calls made to or from your extension. Call information includes date, time, telephone number, length of call etc. From this screen, you can also view a call in more detail.
Configure:	Lets you change the way SmartConnect works on your computer. All the items in the **Configure** window have a tip displayed to let you know what they do.
Unload SmartConnect:	Quits SmartConnect.

NB: Your network administrator may have disabled some features.

The Address Book

The **Address Book** is one of the features you will use most often with SmartConnect. The screenshot and explanations below show you how to use it.

Click this to select from which address book you will view data.

Click one of these buttons to view 50 entries that begin with the selected letter.

This is where the selected data that you have searched for will appear.

Click **Show** to view further details about the selected contact. (See below)

Click **Dial** and a list of the selected contacts telephone numbers will appear, allowing you to call the contact with just a couple of clicks.

Search for the entered information.

To search for a company or contact name (or part of one), enter the text here and click **Go.**

To search for part of a telephone number, enter the number here and click **Go**.

NB: Depending on your system configuration, you may not have access to all of the features on this screen.

Contact Details

Clicking the **Show** button in the Address Book brings up this screen. It shows the selected contact's name, address, telephone numbers, and other custom information specifically selected by your administrator. This screen also shows the contact's **Call History**. From here, you can see the time/date and length of the last 50 calls this contact made to you or calls you made to him. Double-clicking one of the calls in the list shows you more details on that call (the contact History feature may have been disabled on your SmartConnect). You may also have access to the **Callback** tab, which lists the users that will be informed when the selected contact calls your company.

Extension Status

This screen shows you the status of all the extensions on your telephone system (some extensions may be invisible). The colors of the lights mean the same as the color of your tray icon explained above with one exception: if somebody's light is yellow, it means their telephone is set to Forward All Calls. If someone is on a call, rest your mouse over his or her name and a small window will pop up telling you who he or she is on the phone to. Click this window and you can see further information like when the call was started etc. Clicking on an extension brings up a popup menu. The contents of this menu depends on your and the selected extension's current extension status. If you are on the phone and they are not, you can view the selected extension's last 50 calls, transfer your current call to them unannounced, or consult with them and then transfer your call. If their phone is ringing, you can use the context menu to answer their call (for instance if they are out of the office). If they are on a call, you can set a callback for them so that you
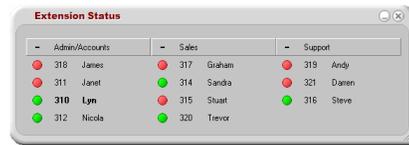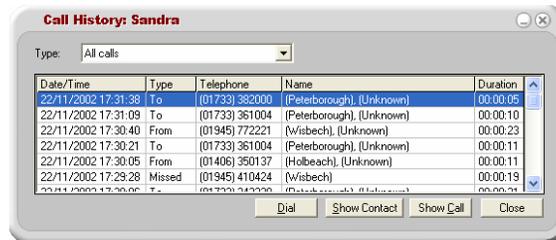

will be informed when they hang up their phone. You can also send SmartConnect text messages to users from the context menu. Extensions that are logged in will appear **Bold** on this screen so you know you can send them messages.

NB: The options available from this screen depend upon your privileges (assigned by your system administrator).

Call History

If you enter this screen from the main menu, you will view your Call History. Administrators can enter it from the **Extension Status** screen to view other peoples Call Histories.

This screen lists the last calls made/received at a given extension. The list is sorted by date/time with youngest call at the top. You can resize this screen to view more or less information at one time.

Select a call and click **Show Call** to view extra details about that call. Click **Dial** and the telephone number of the selected call will be automatically dialled. Select a call and click **Show Contact** to view contact information (like from the **Address Book** screen).

You can choose whether to view Missed, External, Internal, or All calls.

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Phone

This screen can be configured to popup when you make or receive a call, and hide when you hang up (see **Configure** below).

This shows the name and company of the caller

This shows the name of the person called and the duration of the call

This shows how many calls you are on.

You can set up to 8 context-sensitive buttons at the bottom of the window to perform specific tasks, like running scripts.

Configure

From this screen, you can set up various details about SmartConnect and the way it works. There are tips at the bottom of the screen to let you know what each option does.

The **General** tab lets you set up your personal details and decide whether to use **Auto-login**.
The **Interface** tab lets you change how SmartConnect should pop and hide various windows.
The **Buttons** tab lets you select which buttons to show on the **Phone** window.
The **Address Books** tab lets you personalize the configuration information of address books on your system.
The **Absence** tab lets you set your absence text and turn it on or off.
The **Speed Dials** tab lets you configure your personal speed dial list.
The **Advanced** tab lets you configure advanced options such as 1st Party TAPI devices.