

## MDS Procall Business Microsoft Outlook plug-in



# **Installation Guide**

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## Table of contents

1) Ir	ntroduction	2
1.1)	TAPI driver	2
1.2)	Procall Business	2
2) Ir	nstallation	4
2.1)	Stage 1: Installing the TAPI driver	4
2.2)	Stage 2: Installing Procall Business	7
2.3)	Configuring the MS Outlook plug-in	10
3) 0	ther applications	12





## 1) Introduction

## 1.1) TAPI driver

The Telephony Application Programming Interface (TAPI) enables PCs running Microsoft Windows to use telephone services. MDS Gateways delivers a basic TAPI driver with each system free of charge. This basic version makes it possible to make calls and hang up calls using your pc. By installing Procall Business, the TAPI driver is upgraded to a professional version. With the professional version it is possible show the telephone status, show incoming calls, transfer, conference, redirect and pickup calls using your pc.

	<b>Basic TAPI</b> Free of charge	<b>Professional TAPI</b> License required
Dialling/Hangup from the PC	Yes	Yes
Show telephone status	No	Yes
Show incoming calls	No	Yes
Transfer, conference	No	Yes
Redirect, pickup	No	Yes

MDS Gateways supports a single user software version only. This means that the software will be installed, used and configured locally on the workstation. The license will also be entered locally. The phone is directly connected to the workstation over the computer network, where the TAPI-driver will be installed, that allows the communication and control of the phone.

### 1.2) Procall Business

ProCall Business extends the capacity of the telephone at your workstation. It is used as a Microsoft Outlook plug-in. The product has a phone call display with names, a journal of all phone calls, a list of unanswered phone calls, extended search of names and phone numbers.

Single user - ProCall Business controls all important telephone functions, e.g. dial, accept, hang-up, consultation, transfer, brokerage, redirect and establish a phone conference. In case of an incoming call, all contact numbers are compared with the stored callers number. So you can recognize immediately who is calling and all associated information is displayed. Incoming calls are recorded to the journal. This gives you a perfect overview of all calls.

The table below shows an overview of the properties of Procall Business.

Procall Business Functions	
Dialing, answer, hangup	v
Configurable Pop-Up (bubble window, contact info, call log)	v
Hotkey dialing (Dial, answer, hangup from all applications; dial through marking the	v
number and pressing a predefined button)	
Customizable redialing	v

2





Hold, unhold, brokerage, consultation, transfer	V
Pickup, redirect	V
conference	V
Call diversion (internal / external calls)	V
Powerdialer	V
Number pad	V
Project pins (for use with journal)	v
Vanity numbers	v
Door opener	V
Charging information	v
Telephone state (connected, busy)	v
Prearrange calls	v
Call journal	v
Primary Line	V
Two lines (Operate 2 phones from one workplace)	v
Programmable actions	
Sounds (individual sound for each caller)	v
Fast search (number, name, company)	V
Display of additional information (company,)	v
Creation of contacts, number assignment	V
Add-In Client (Microsoft Outlook)	
Add-In technology	V
Contacts / journal / tasks	V
Powerdialer	V
Displays unanswered calls in the mailbox	V
Redirection of "unanswered call" e-mails	
Access to public Exchange folders *)	V
Installation	
MSI (Microsoft Windows Installer)	V
Domain / group policy (managed installation)	v

#### Requirements

- ? Windows 95/98/Me, Windows NT, Windows 2000/2003 or XP
- ? Outlook 97, 98, 2000, 2002 or 2003





## 2) Installation

The installation consists out of two stages that will be described in the following paragraphs:

- Installation of the TAPI driver
- Installation of Procall Business

Only during the second stage, a license key needs to be filled in.

## 2.1) Stage 1: Installing the TAPI driver

Please follow the steps listed below to install the TAPI driver on your pc.

> Run "setup.exe"



> Click "next" until you get to the "connection" screen.







- > Fill in the IP address of the PBX and click next.
- > If the application is able to contact the PBX, all lines will be loaded from the system.

🖬 MDS Tapi-Link	<b>X</b>		
Connection Setup the parameters for connecting th	e PC to your PBX		
Enrection	1		_
		Query PBX system	$\mathbf{\times}$
		The Lines are now loaded from your PBX System.	
Network (TCP/IP)		Status: Connection OK	
Port 5001			
K Ving	e Volgende> Annuleren Help	Cancer	

- > Please select "single workstation" as shown below.
- > The server version is not supported and the license key will not be accepted.

🖬 MDS Tapi Link 🛛 🔀	
Operation mode Workstation or serves	
Desizion node	
Single receivatetion (1 st party)	
The driver offers one telephone extension as Tapi line. This mode should be used for a single workstation.	
Server (3id party)	
The diver offers all extensions of the PBX as Tapi lines. This is required for a CT1 network solution.	
(⊻onge Vojgende>) Annuleren Help	
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> On the next screen, <u>no</u> license key needs to be entered. Click "next" to continue.

conses Enteryour license keys for the PBK s	yotem here.	md
Licenses in the PBX		
License Key	Received and	
Basic licenses (dialling only)	unimited	
Professional licenses	0	
Piotessional with ESTDS ProCal	unlimited	
Hardware ID:	000919000081	
Valid to	(h) (h)	
Add Licenses		Query PBX system.
Lizenzen wiederherzteilen		Verwandung anzeigen
Apply for a trial license		

> On the screen below, the extension should be selected that will be linked to the pc. In the example below, extension 11 (11-Tst 11) is linked to the pc.

MDS Tapi Link	8	MDS Tapi Link	<b>X</b>
Advanced Advanced Interface Parameters	mds gateways	Lines Which extension do you want to use	mds
Phone Number Formal Edit Formal	You may apply rules for the signaling of phone sumbars. You may for example stip the access codes from all numbers. For prostinking you may enter location information.	Single workstellern (Tot porty) Extension	11 - Tat 11 V Uses professional licenses Load Lines from PBX.
( Yange	Volgende > Annuleren Help	( Vaige	Volgende > Annuleren Help





The TAPI driver is now successfully installed on your pc.

## 2.2) Stage 2: Installing Procall Business

Now that the TAPI driver is installed, the pc and the selected extension of the PBX are linked to each other. Now it is possible to install procall busines. In this stage the license will be entered.



> Click "next" until you get to the "installation type" screen.





> Please select "single workstation" and click "next" to continue.

> In the screen below, "procall business for Outlook" should be selected. The other options are <u>not</u> supported. Click "next" to continue.







> In the screen above, please select "procal standard / business". Click "next" to continue and enter the license key in the screen below.

ProCall Client Setup - User Settings	5
Licensing Enteryour License code	ESTOS
Enler your name (License name) Here	
Fries your license code here: The iconies code looks like 1000/1234512345 or 1000000000000000000000000000000000000	Yalidate
License Status:	Notregistered

> Click "next" and finish the installation. Procall business is now successfully installed.





### 2.3) Configuring the MS Outlook plug-in

After the installation of Procall business, Microsoft outlook needs to be started. The plug-in will now be configured with use of the following wizard. It will start automatically.

> In the step below, the extension should be specified that will be linked to the pc. In the example below, extension 11 is linked.

ProCall Settings	ProCall Settings	
Welcone	OS Choosing the tokphone device	
Welcome to ESTOS ProCall We will now apply some settings that are required for this software. Choose Next to proceed.	Use IAPI Line (preferred)     Revise      Interference      Provide      Provide the address for outgoing calls      Show phone calls only for this address      Interference       Interference	
	Redial Device Settings	
	Charging Settings Device govanced	
	C Line(SON Controle) (EAFI) (AFI Advanced	
< ympe Vogende >	teb (Volgendes) Heb	

> Please follow the steps below to configure the client. If help is desired, please click the corresponding "help" button.

ProCall Settings		ProCall Settings
Location Setup the location of your telepho		Personal data Sefup for quickdal and cell torwarding
Location Country/Plegion Area Eade: Cacation has beliephone system	Hadated 071 Databa	For a quick setup of quickdal and call forwarding entries please enter some phone numbers.  Esternal phone numbers  Your inchile phone numbers
- Advanced - Use Providers - Use Projectodes/PIN's - Use Projectodes/PIN's	Progder Settings	
I™ Usa Yanky numbers, area code □ Usa Porrendialer	Powerdieler Settings	
	Varige Volgende >	Heb Volgende > Heb



Communications made easy

mds gateways

ProCall Settings	ProCall Settings
General Window appearance on cells	General Window appearance on cells
Incoming calls           Story Placal Window           Story Placal Window           Story Quickinto (bubble window)           Deen found contact water what           Open created pland entries automatically	Insoming calls           Insoming calls           Show Proceal Window           Show Quickinto (bubble window)           Deen found contacts automatically           Deen created journal critics automatically
Bulgding calls     Show ProCall vendow     Show Quick Wid (bubble window)     Open found contects automatically     Open created journal entries automatically	- Dutgsing calls Show ProCall window Show Dutishing (bubble kindow) Open found contacts automatically Open created journal entries automatically
Custon Actions Advanced Settings	Custon Actions Advanced Settings



Sound Play sounds an incoming a	al and	and and	estos
incoming calls			
Sring, wav			
	Elay	Browse	
Play individual sound for	each found contact		
Flay individual cound for     Tack reminder	each found contact		
Task reminder	each found contact		
Play individual cound for     Task reminder     Play Sound     Sveminder very	each found contact		
Play individual cound for     Task reminder     Play Sound     Veninder very	each found contact	Biganse	
Play individual cound for     Tack remainder     Play Sound     Venninder verv	each found contact P(ay	Biganasa	

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11



Procall Business is now configured and ready for use.

## 3) Other applications

On top of the TAPI driver other applications can also be installed. On the internet a lot of these third party applications are offered.

