

Infodesk Phone

**The simple telephone system integration for
Microsoft Outlook[®]**

**Manual
Version 4.2**

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1. Introduction

Infodesk Phone from **Fischer Software – Berlin** is a simple telephony integration for Microsoft Outlook ©: Let's get your Outlook - contacts show with incoming phone calls automatically! The program was created in cooperation with the firms AVM and Microsoft.

Infodesk Phone is available in three versions:

Version 4.0	Infodesk Phone (freeware)	Infodesk Phone (also evaluation)	Infodesk Phone for Microsoft CRM
FRITZ.Box TAPI-connection	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
any TAPI-connection		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CAPI-support		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Backwardssearch on the internet		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Journalsupport		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Any Outlook-addressfolder		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Screen MSN		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create new Contact automatically		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
optimized companysearch		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Outgoing dialing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dialing from marked numbers		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MS CRM connection			<input checked="" type="checkbox"/>
No advertising (after 10. call)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BCM (Business Contact Manager)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Support after service concept		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Prices (plus VAT)	0,- €	39,- €	85,- €

Infodesk Phone offers after installation the full functionality for 30 days (excluding CRM). If there is no licensing during the test phase of the **Infodesk Phone** the freeware version with the specified restrictions is for further use.

Please ask for an evaluation license **Infodesk Phone for Microsoft CRM** via e-mail.

Note: Please bear with us that no support is available for the freeware version.

2. Installation

2.1. System requirements



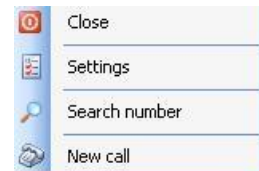
The installation is done on the local PC (client), local administrative rights and installed a TAPI or CAPI driver is needed.

To operate a version of Microsoft Outlook (versions 2002/XP, 2003 or 2007) is required.

Installation of .NET.Framework version 3.5 SP 1 is required and will be installed from Setup when it isn't installed. To do this run the "setup.exe"

2.2. Deinstallation

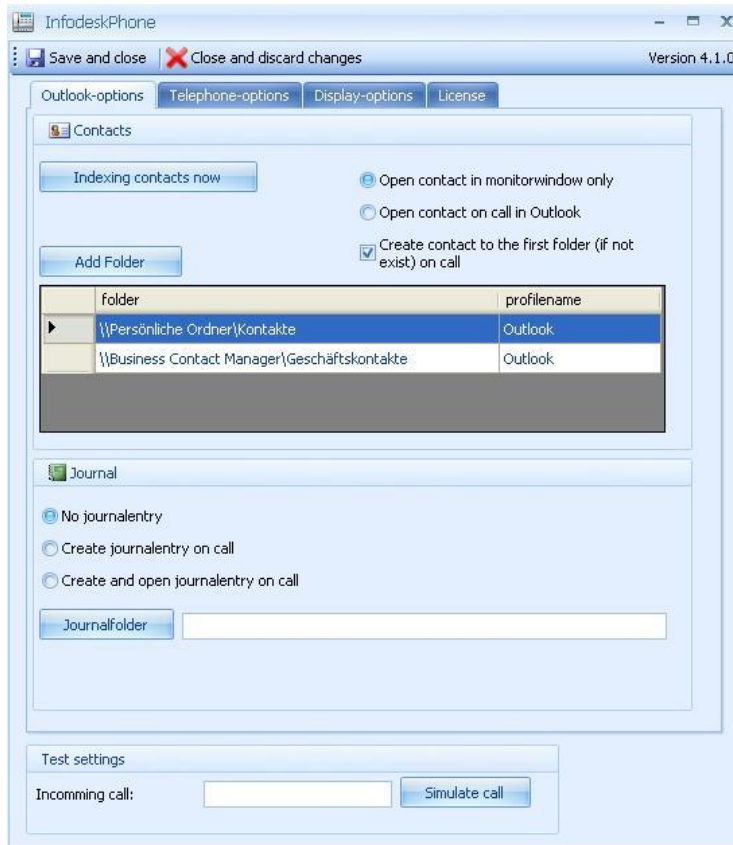
To uninstall you first close Microsoft Outlook, then click the right mouse button on the **Infodesk Phone** - system tray icon and exit **Infodesk Phone** with the button "Close".



Then you can uninstall (in the control panel under software) **Infodesk Phone**.

3. Infodesk Phone Settings

The Infodesk Phone settings can be made via the Options window. You can reach it on the little telephone icon at the bottom right of the taskbar by right mouse button and the menu item "Preferences."



3.1. Outlook options

In the Outlook options you choose, if only the call monitor (a small window in the lower right) or also open the contact. We recommend the option "Contact not open", otherwise when calling a contact window will appear and it can prevent you from the current work.

3.1.1. Add folder

With the function "Add Folder" you can add monitored Outlook address folders. If the folder or contacts changed or added, then you should manually review index on the button "contacts reindex". In the future, then every time Infodesk Phone (Windows Logon) developed the index.



Optionally, the contact by means of radio button is automatically created in Outlook, so far this contact does not exist. When activated, the contact will be created in the top folder. In order to position the folder at the top, need to delete the folder above and then reassign them again.

3.1.2. Creating a Journal entry

If an incoming call a number indicates a journal entry is automatically created in your personal journal folder with date and time. This entry is now also carried out on outgoing calls, and start the timer. If **Infodesk Phone** finds an appropriate contact it is linked in this journal entry. This gives you a perfect call log of all incoming and outgoing calls, even when you are at work.

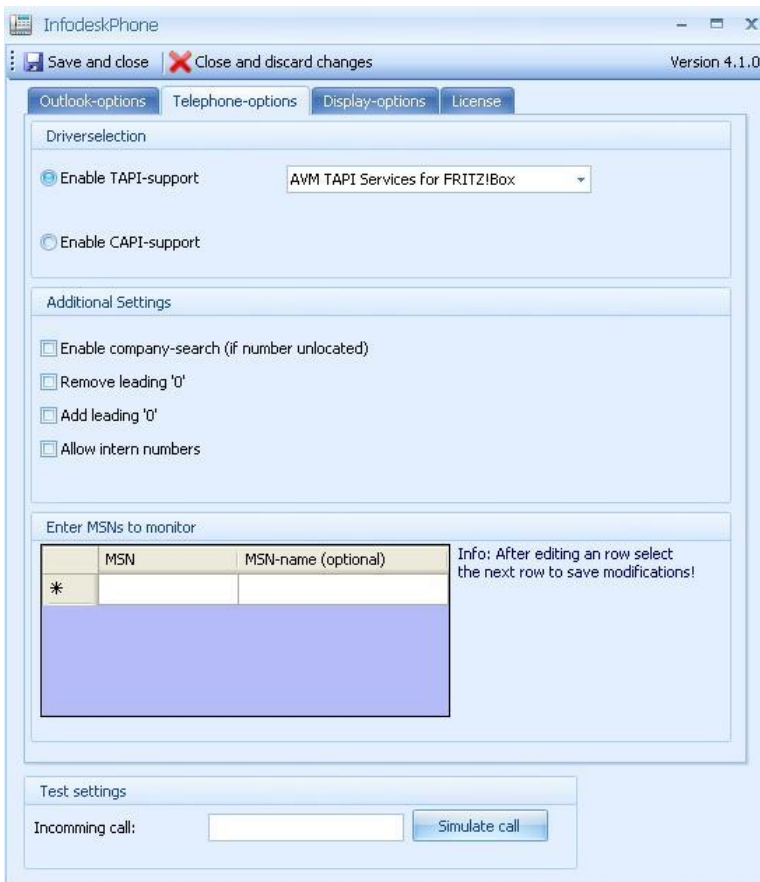
If no journal folder specified (e.g. a published network journal in the public folder of Exchange server), the default Journal folder is always the standard journal folder of the mailbox used.

3.1.3. Test Settings

Enter in the field "Incoming call" one number that exists in the Outlook contacts telephone numbers and click "Simulate call".

Now opens, depending on the settings, the Outlook contact or the call monitor.

3.2. Telephone options



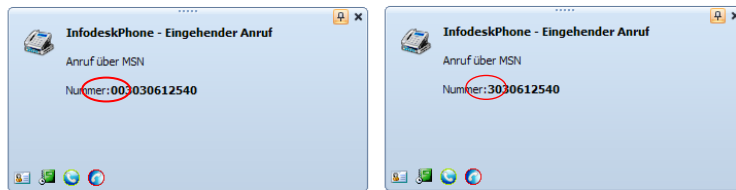
3.2.1. Use additional CAPI / TAPI-driver

In the freeware version, only the TAPI driver "AVM FRITZ! Box Fon" is supported. In the full version are all installed TAPI driver detected and you can select the TAPI-driver to be monitored. Alternatively, a CAPI driver can be used.

3.2.2. Company search

With the function "Company Search" also contacts are found, which were stored with a central number (123 456 - 0) when called by a direct-dial telephone (123 456 - 40). Will be considered up to 5 direct dial numbers.

For some bindings, the TAPI option add / remove "Leading 0" will be chosen if there are problems with the signaled number of the caller.



By setting the radio button "Allow internal number", internal calls will be displayed. Requirement is an entry in a phone field of contacts in the appropriate format (e.g. 4213 or 610 ** in FRITZ.box). Users of Outlook Infodesk use two preceding stars, because the phone number otherwise automatically converted into the canonical format.

3.2.3. MSN filter

If there are several MSN's signals on your TAPI adapter, here you can limit the screen of monitored MSN's. Enter in the complete ISDN telephone number without any spaces or characters without area code, including area code for VoIP. Normally, this window can be left blank.

3.3. Display options



3.3.1. Settings Call monitor

Here you can specify the desired display duration, the speed of the window opening and the position of the call monitor.

3.3.2. Dialinghelp – ShortCut

Define yourself your own global shortcut for activating the Infodesk Phone Dialer and then register it via the Button "Register shortcut now".

With this function you can directly dial the marked number with the ShortCut.

3.4. License

In the menu bar of **Infodesk Phone** at the tab "license" the setting for the details of your license data can be changed. This information may be in a file (InfodeskPhoneConfig.xml), including the storage path (e.g. stored in the network). Other workstations can use license file then from there. Please note that you need for each used workstation a license from **Infodesk Phone** (Client - Licence).

4. Use Infodesk Phone

4.1. Start

For the first time please use the **Infodesk Phone** - icon on the desktop.

After that **Infodesk Phone** starts at each reboot of the system automatically. The icon is located after starting the program in the taskbar at the bottom right of the screen. Also, your contacts - folders automatically indexed and the TAPI support for the fritz.box is activated. Other settings are possible at any time, except in the freeware version.

4.2. Inbound Telephony

At incoming calls a transparent small window with the number of the caller and the called MSN opens at the bottom right of the screen. If found and this option was previously selected, the corresponding contact will open in the Outlook address form.

4.2.1. Backwardssearch of numbers on the internet

If the incoming phone number is not found in the Outlook address folders a backwardsearch on the Internet through the telephone service www.GoYellow.de will be executed. Can the number be resolved there, it is shown on the monitor screen and, if applicable, the name of the company name.

If the user clicks on "Open contact" or if this option is already preseted, a new Outlook address form, in which are all founded data from www.GoYellow.de initialized, will be opened.

4.2.2. Additional functions of the call monitor

While call monitor is open, the following functions can be selected for display.

The associated contact can be opened by clicking on the "Open Contact".

By pressing "Open journal", the journal entry linked with timing will be opened in Outlook.

The two buttons with the receiver symbols are used to answer the call or to put on (e.g. for headsets).

The timings, the display speed and the position of the call monitor can be adjusted in the settings as needed.

4.3. Outbound Telephony

4.3.1. Calls with the Infodesk Phone Dialer

Launch the dialinghelp with a mouse click (left one) on the Infodesk Phone - icon in your taskbar.



Enter the phone number manually or copy a phone number to the clipboard and then into the field and start the call with one click on "start call".

4.3.2. Call via ShortCut


Mark in any application (e.g. an internet site) a phone number, and then press the self-defined shortcut (e.g. Ctrl + Alt + W).

The Infodesk Phone Dialer will be opened and the call will start automatically.



Quit the call by clicking „Quit call“.

4.4. Search a Number

Simply search for phone numbers on Infodesk Phone by clicking the right mouse button on the Infodesk Phone icon  in the taskbar.

Select „Search number“ and the following window will be displayed.



Enter a phone number (e.g. in the phone display or the call list) and start the search with the "Search".

It will search the Outlook contacts and displays the founded contact in the call monitor.

Open the contact by clicking on the small contact icon bottom left of the Call monitor.

5. Contact

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