

SmartPhone Documentation Contents

SmartPhone Documentation Contents	1
SmartPhone End User License Agreement	2
SmartPhone Installation Guide	4
SmartPhone User Manual	5
Getting More Out Of SmartPhone	30
SmartPhone Frequently Asked Questions	39

SmartPhone End User License Agreement

This End-User License Agreement (EULA) covers the SmartPhone Suite of software products, including, but not limited to SmartPhone, SmartTSP, SmartCmd and SmartUpdate.

IMPORTANT - READ CAREFULLY: This End-User License Agreement ("EULA") is a legal agreement between you (either an individual or a single entity) ("YOU") and Tiger Software Ltd ("TIGER") for the TIGER software 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 TIGER. 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 TIGER. YOU may not copy the printed materials accompanying the SOFTWARE PRODUCT. This EULA grants YOU no rights to use such content. TIGER reserves all rights not expressly granted under this EULA.

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 TIGER 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.

THIS SOFTWARE, AND ALL ACCOMPANYING FILES, DATA AND MATERIALS, ARE DISTRIBUTED "AS IS" AND WITH NO WARRANTIES OF ANY KIND, EXPRESS OR IMPLIED. THIS INCLUDES ANY WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. YOU must assume the entire risk of using the program. THIS DISCLAIMER OF WARRANTY CONSTITUTES AN ESSENTIAL PART OF THE AGREEMENT.

TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL TIGER, OR ITS PRINCIPALS, OFFICERS, EMPLOYEES, AFFILIATES, CONTRACTORS, SUBSIDIARIES, OR SUPPLIERS, BE LIABLE FOR ANY DIRECT, SPECIAL, INDIRECT, INCIDENTAL, CONSEQUENTIAL, OR PUNITIVE DAMAGES WHATSOEVER (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, LOSS OF INFORMATION, BUSINESS INTERRUPTION OR ANY OTHER PECUNIARY LOSS) RELATING TO THE USE OF, MISUSE OF, OR INABILITY TO USE THE SOFTWARE PRODUCT, OR YOUR RELATIONSHIP WITH TIGER EVEN IF TIGER HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

IN ADDITION, IN NO EVENT DOES TIGER 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 TIGER HARMLESS FROM ANY CLAIMS OR LOSSES RELATING TO SUCH UNAUTHORIZED USE.

All rights of any kind in THE SOFTWARE PRODUCT that are not expressly granted in this EULA are entirely and exclusively reserved to and by TIGER. 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.

SmartPhone Installation Guide

To install SmartPhone, first make sure no programs are running. Next, proceed to the appropriate step below:

Installing from 3.5" floppy diskettes

If you are installing SmartPhone from floppy discs, insert Disc 1 into your floppy drive, click **Start, Run** and enter **A:\Setup** in the box that appears. Click the **OK** button and installation will begin.

Installing from a CD-ROM

If you have a SmartPhone CD-ROM, insert it into your CD-ROM drive and installation should begin automatically. If it doesn't, click **Start**, then **Run** and enter **D:\SmartPhone 1.40\Setup** (where **D:** is the letter of your CD-ROM drive) in the box that appears. Click **OK** and installation will begin.

Installing from an internet distribution

If you downloaded SmartPhone from our web site, click **Start, Run** and enter **C:\Smart\Setup** (where **C:\Smart** is the directory that you saved the downloaded file in). Click the **OK** button and installation will begin.

After you have been through all the installation screens, the SmartPhone files will be copied to your computer. After the files have been copied, SmartPhone is ready to use. It will automatically be loaded next time you start your computer, or you can access it by clicking **Start**, pointing to **Programs**, pointing to **SmartPhone** and clicking the **SmartPhone** item.

Uninstallation

If you ever wish to uninstall SmartPhone, open the **Control Panel**, double-click **Add/Remove Programs**, and in the list that appears, highlight **SmartPhone** and click **Add/Remove**.

SmartPhone User Manual

Welcome to SmartPhone!

Thank you for choosing SmartPhone - the worlds premier CTI software. This document will attempt to explain in as simple a way as possible how to use SmartPhone. 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 SmartPhone; (iii) an FAQ which answers common questions posed by SmartPhone users; and (iv) an installation/uninstallation guide which talks you through installing SmartPhone on your computer. If you do not have these, they are available from the Tiger Software web site at: www.tiger-software.com

This manual is broken up into eleven sections:

Introduction: shows you how to start SmartPhone, 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 SmartPhone'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 SmartPhone to make it work the way you want.

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

Introduction

What Is SmartPhone?

SmartPhone is a Computer Telephony Integration (CTI) product. This means it links your desktop computer and telephone system together. Many believe that CTI is at the heart of the future office and SmartPhone was one of the first CTI products of its kind to be released in the United Kingdom.

What Does SmartPhone Do?

SmartPhone 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 SmartPhone 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 can also connect your databases of contacts to SmartPhone 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 SmartPhone do it for you!

SmartPhone also supports scripts written in the popular VBScript language 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 dialling from the SmartPhone **Address Book**, you can use SmartTSP to dial from programs that support TAPI dialling (via SmartPhone).

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.

SmartPhone 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 **SmartPhone**. On the menu that appears, click on **SmartPhone**. If you are presented with a Tiger Software login screen, enter your extension number in the Username box, and your SmartPhone password in the Password box. These can be obtained from your network administrator.

◀ Feature
◀ Last Number Redial
 Set absence text
 To do list
 Address Book
 Extension Status
 Phone
 Call History
 Configure
 Unload

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, SmartPhone will not login. Instead, the icon will go grey 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 SmartPhone's features, you use the SmartPhone icon in the System Tray. The System Tray is the sunken area in the very bottom-right corner of your screen. It has 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 any virus scanners you may have loaded. The SmartPhone icon is the circle. The circle may be red, green or grey, 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 icon is flashing, it means your phone is ringing.



When this document tells you to open a certain SmartPhone screen or window, it means click the SmartPhone 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 coloured circle near the clock. This circle is the SmartPhone icon. A menu will roll out showing up to ten 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.

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 SmartPhone, set Callbacks, pick-up other people's calls, ring people, and see who people are on the phone to.

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. 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 contacts information (like from the **Address Book**).

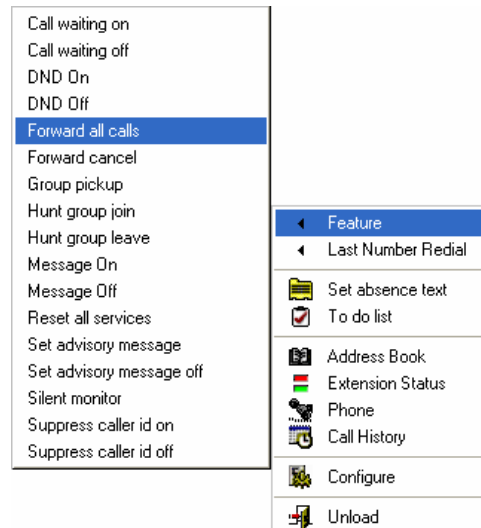
Configure: Shows the configuration screen. This is where you can edit your information such as name, department, and password, and change your options like whether or not to "pop" the **Phone** window on incoming phone calls.

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

Quick Features

If your system is set up for it, you may have a Features sub-menu on the SmartPhone 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 dialled 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 it's 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 dialling the selected feature code at your handset. The features themselves are controlled by your telephone system, not by the SmartPhone software. Therefore, if they do not work as expected, it is likely because of a telephone system fault, not a bug in SmartPhone.

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.

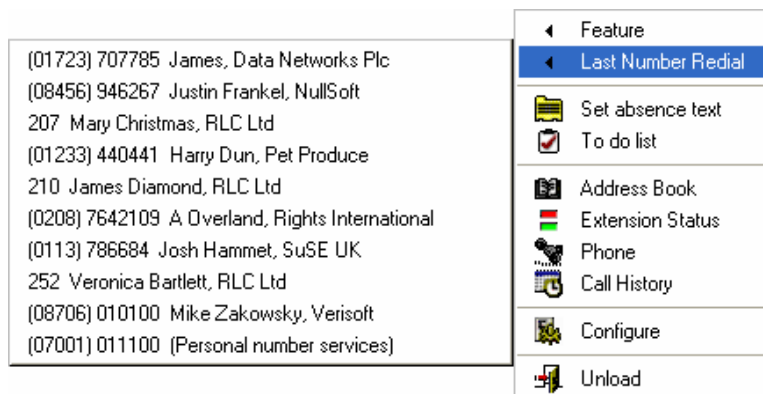
These numbers are stored locally on each SmartPhone machine, so the numbers you see on your machine may differ to those on another person's machine.

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 SmartPhone. 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.

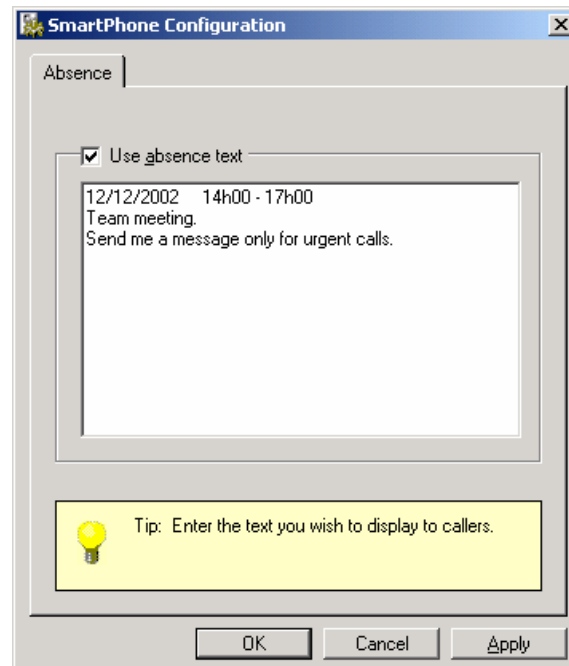
Only calls where the telephone number is known will be displayed. If you receive a call from an unknown number, it will not show up in the **Last Number Redial** list. Also, any phone calls you make or receive while not logged in to SmartPhone will not show up in the **Last Number Redial** list even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



Absence Text

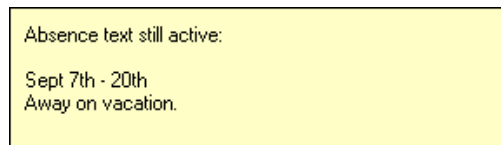
In many popular email programs, it is possible to set an "Out Of Office Auto-Reply" which will inform people who send you email that you are absent and therefore cannot respond. You can also set Advisory Messages on certain telephone systems that will display a pre-defined message to callers such as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

SmartPhone's equivalent feature is called **Absence Text**. When you have an absence text set, if a SmartPhone 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 SmartPhone tray menu. The **SmartPhone 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 SmartPhone, 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 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 anybodies 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 SmartPhone, you can send and receive instant SmartPhone text messages to other SmartPhone 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 SmartPhone, you can also set Callbacks – these are used when someone you need to speak to is on the phone. If you set a Callback, SmartPhone 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 SmartPhone 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.

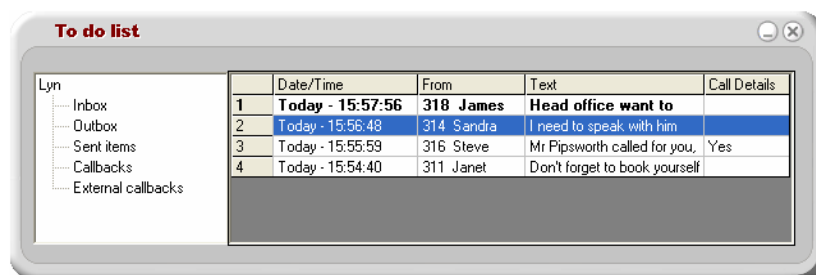
Outbox – click on this to view a list of the messages you have sent that have not yet reached their destination (normally because the person you sent them to hasn't logged in to SmartPhone since you sent the message. Whilst a message is still in your Outbox, you may cancel sending it by opening and then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

Sent items – this folder lists the SmartPhone 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, SmartPhone 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.

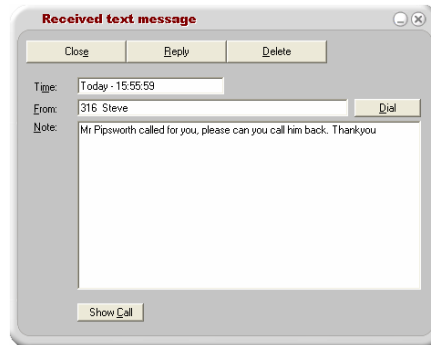
To view a message that is in any of the other folders apart from **External callbacks**, simply double-click it from the list. It will open up into a window from which you will be able to reply to the sender of the message, call the sender of the message, or delete the message.



For more information on setting Callbacks and sending SmartPhone 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 SmartPhone, 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.

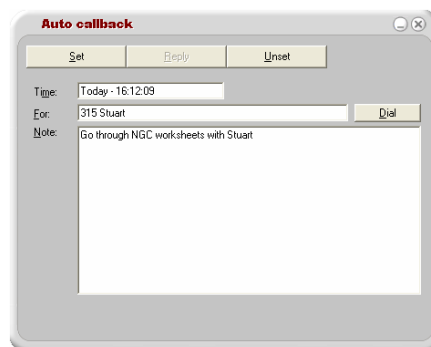


If you have received messages when you have not been logged in to SmartPhone, they are saved on the SmartServer computer for you. The next time you log in to SmartPhone, the **To do list** will be automatically displayed with the **Inbox** folder open.

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 SmartPhone 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**.

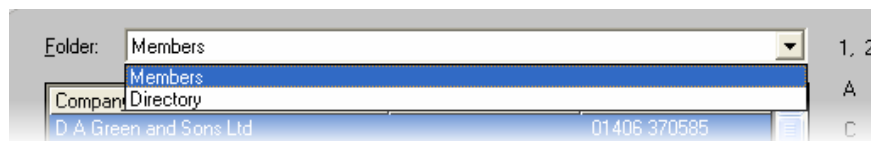
NB Each extension may only set a maximum of one Callback per contact.

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.

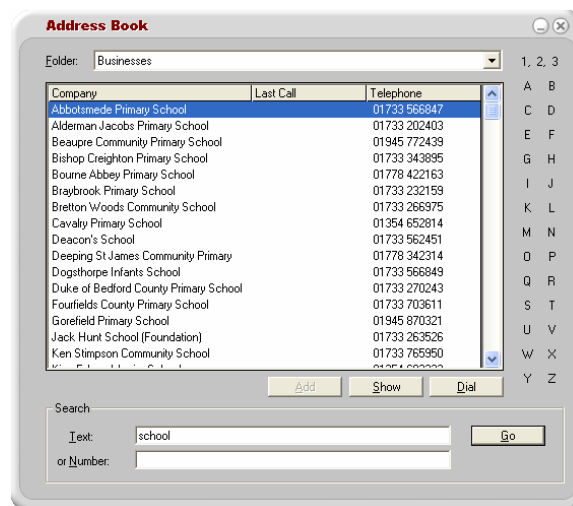
Selecting Address Book

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.



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, all 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, all 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 (labelled **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, all 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.

Dialling 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, SmartPhone 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

SmartPhone 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. SmartPhone 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. It contains the following fields and values:

- Name: Barney Rubble
- Company: ESG Consulting
- Business: 01484 484484 (with a "Dial" button)
- Mobile: 07797 484159 (with a "Dial" button)
- Home: (empty) (with a "Dial" button)
- Address: ESG Consulting, 1st Floor, Seirs Park Offices
- Town: Bedrock
- 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 SmartPhone 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 SmartPhone 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.

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 SmartPhone 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, deflect calls, send SmartPhone messages, set Callbacks and view Call Histories. You can also use it to see which users are logged into SmartPhone 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.



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 square to the left of the extension. It will be coloured in green or red, 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 colour, it means that the telephone at that extension is in use (off the hook). If the lamp is flashing green 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 colour, 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 SmartPhone in order to make use of this feature. This feature only works on compatible switches.

The Extension's Number

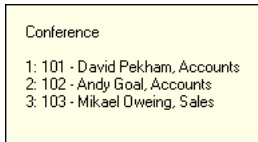
After the status lamp is a three or four digit number indicating the internal telephone number of the extension. This is the number you would dial on your telephone, not the number external callers would need to dial.

The Extension's Name

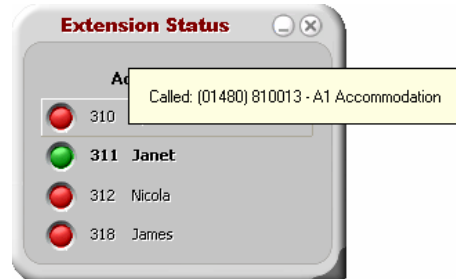
The last part of the extension status indicator is the name that SmartPhone associates with that extension. Your system administrator can change all names, and you can change your own name.

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.

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



If an extension is shown as being off hook (a red square), you can check who they are 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 instead of 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 SmartPhone 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 SmartPhone.

Viewing Call Histories

Just like the Call History that is kept for your contacts in the Address Book, SmartPhone 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 other 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 **Minimise** (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 SmartPhone. 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 SmartPhone.

To send a SmartPhone 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.

Deflecting Calls

Imagine that you work in sales and a customer who you know has outstanding accounts calls the sales department in your company. Rather than letting them talk to somebody sales, you wish them to speak to somebody in accounts. Rather than answering the call, taking their details, putting them on hold, and transferring the call, it would be easier to simply deflect the call directly to their account manager's extension without even needing to answer your telephone.

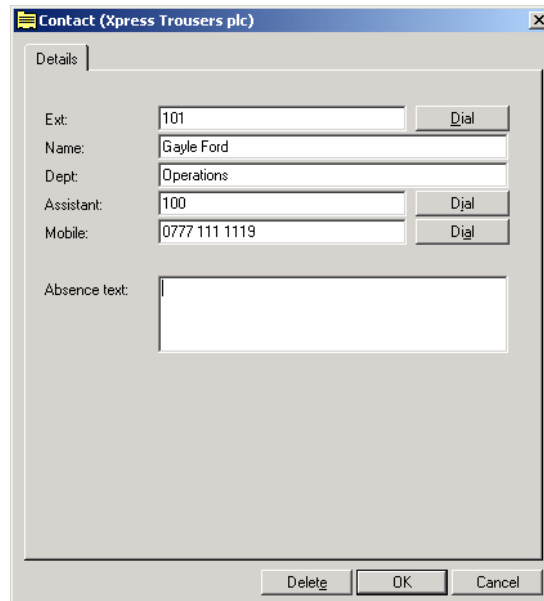
SmartPhone enables you to do this as follows:

When your telephone is ringing, go to the **Extension Status** screen and click on the extension that you wish to deflect the caller to. From the context-menu that appears, select **Deflect**. The call will automatically be diverted to the extension you selected and all other phones that were ringing will stop ringing.

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 (Xpress Trousers plc)". Inside, there is a "Details" tab. The form contains the following fields and buttons:

- Ext: 101 (with a "Dial" button)
- Name: Gayle Ford
- Dept: Operations
- Assistant: 100 (with a "Dial" button)
- Mobile: 0777 111 1119 (with a "Dial" button)
- Absence text: (empty text area)

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

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 SmartPhone 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 SmartPhone 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.

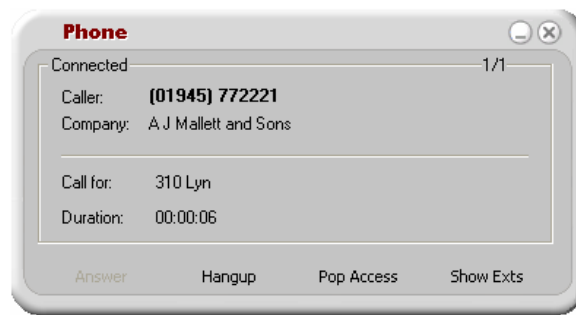
The Phone Window

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 SmartPhone 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 persons 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 dialled your number, or whether the caller has just dialled 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 dialled.

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.

Call History

The **Call History** window shows the last 50 calls made to/from a given extension. It can show: All calls, Internal calls, External calls, or Missed calls. 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

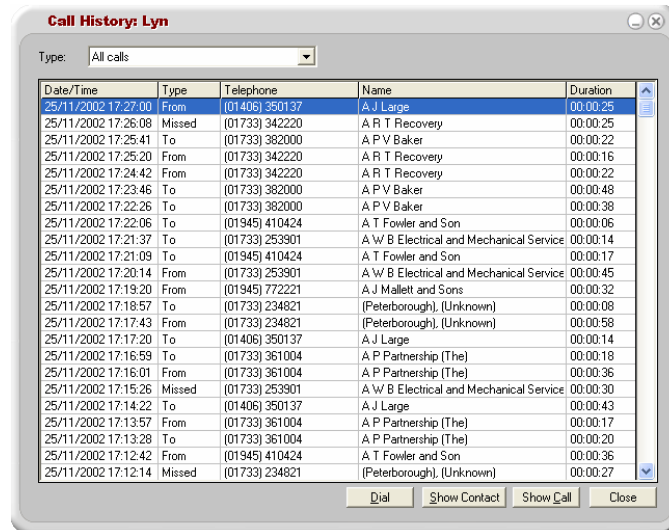
The types of call that can be shown in the Call History window are:

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.



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.

Dialling 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 SmartPhone 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 SmartPhone's settings is by using the **SmartPhone Configuration** screen, accessed by selecting the **Configure** item from SmartPhone's tray menu. This screen has up to four 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 SmartPhone. 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 SmartPhone as.

Name – the name displayed by SmartPhone 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 SmartPhone.

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

The image shows a 'SmartPhone Configuration' dialog box with the 'General' tab selected. The fields and their values are: Extension: 100, Name: Joe Wright, Department: (empty), Password: (masked with asterisks), Assistant: 555, and Mobile no: 0776 667 7667. The 'Auto login' checkbox is checked. A yellow tip box at the bottom states 'Tip: Please enter your extension number.' The dialog has 'OK', 'Cancel', and 'Apply' buttons at the bottom.

Extension

Entering a different extension number in this box will change whose settings and privileges you use when you use SmartPhone 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 SmartPhone 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 SmartPhone 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 SmartPhone, it will appear in this box, but the actual letters will be replaced with asterisks (*).

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

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

If you currently use a password to access SmartPhone, 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 SmartPhone.

Auto login

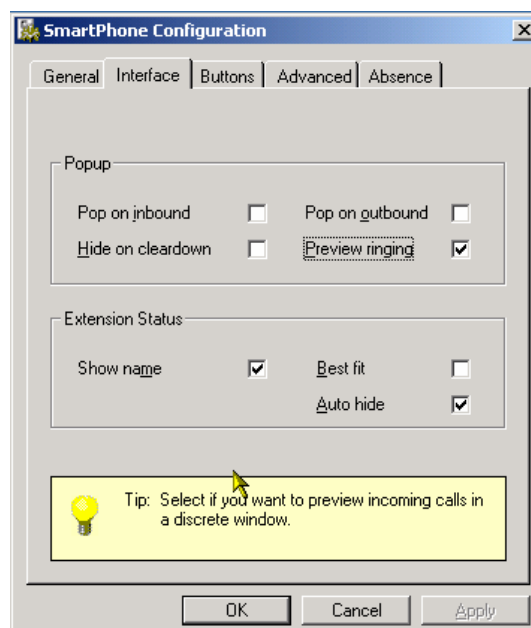
The **Auto login** check box enables you to decide whether or not SmartPhone will ask you to enter an extension number when it is started.

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 SmartPhone 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 SmartPhone 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 SmartPhone 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.

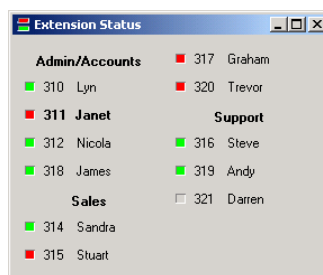
By default, the **Preview** window appears at the left-most corner of your monitor, however you can move it where you want by holding down your left mouse button over it's top edge and dragging the window. The next time the window pops, it will appear in this new position, but still on the bottom of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

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 **SmartPhone 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.

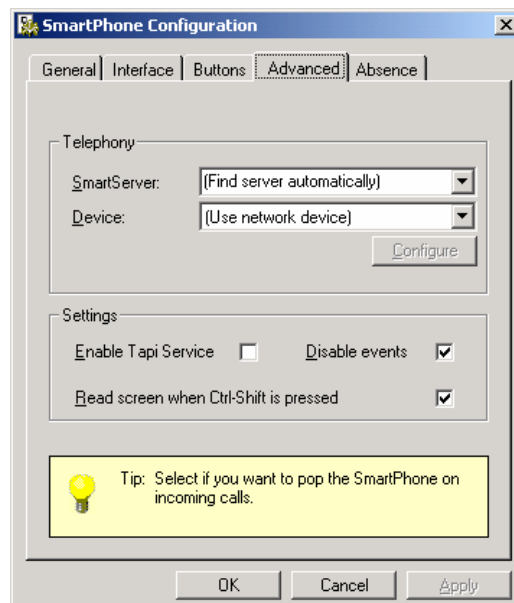
The buttons in the list are numbered left to right, top to bottom. If you have 4 buttons, there will be one row of four buttons in it. If you select 8 buttons, there will be two rows with four buttons in each row.

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

The available button types are enumerated in the document entitled Getting More Out Of SmartPhone.

Advanced Options

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



SmartServer

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

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

If SmartPhone cannot find an instance of SmartServer to login to, it will sit quietly in the system tray area and its icon will stay greyed 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)**.

Device

This lists all telephony devices installed on your system. If you have a 1st Party TAPI device installed and wish to use SmartPhone with it, you may select it from the list. Click the **Configure** button to bring up the manufacturer's configuration screen for the selected device.

If you wish to use SmartPhone over the network (i.e. connecting to SmartServer), select **(Use network device)** from this list.

The default setting is **(Use network device)**.

Enable Tapi Service

Check this box to automatically install and enable the SmartTSP telephony service provider, which enables you to dial through SmartPhone 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).

Read screen when Ctrl-Shift is pressed

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. SmartPhone 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.

Absence Text

The **Absence** tab configures exactly the same settings as clicking **Set absence text** from the SmartPhone 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.

You may have other tabs on your system like **MS Outlook** or **Goldmine**. These tabs are used to configure the various plug-ins available for SmartPhone and are only visible when you have the appropriate plug-ins enabled for your extension. For more information on plug-ins and how to configure them, see the document entitled Getting More Out Of SmartPhone.

Getting More Out Of SmartPhone

Introduction

This document will guide you through the advanced features of SmartPhone, showing you how you can get more out of it, like dialling 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 SmartPhone users; and (iv) an installation/uninstallation guide that talks you through installing SmartPhone on your computer. If you do not have these, they can be found on the Tiger Software web site: www.tiger-software.com

This document has five sections:

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

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

Dialling with TAPI – shows you how you can use SmartTSP to dial from TAPI enabled applications

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

Using Plugins – all about the plug-ins that you can get to further enhance SmartPhone.

Programmable Buttons and Scripts

The **Phone** window of SmartPhone 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 **SmartPhone Configuration** screen. To find out how to set up buttons, refer to the appropriate section of either the SmartPhone 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.
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 a not a SmartPhone 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.
(Script)	Script name	Runs the selected script. See below for more on scripts.

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".

Scripts

SmartPhone scripts are short pieces of code that can be set to execute on certain events or when users click buttons on their **Phone** window. They are generally used to do things like opening your company database at a specific record depending on who is calling. For instance, you could have your database show the account details of customers that are calling you, so that you can start thinking about how to answer the call before you answer it.

The scripts SmartPhone uses are written in the popular Microsoft VBScript language. This language is very easy to code in and is often used in web pages. If you want information on the VBScript language, please go to Microsoft's web site: www.microsoft.com.

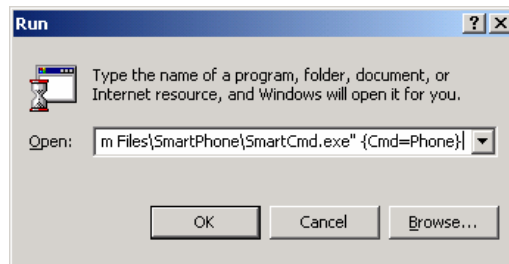
If you want Tiger Software to write a custom script for you, please contact us. Email addresses and telephone numbers can be found on the Tiger Software web site: www.tiger-software.com.

To find out how to import a script you have written into SmartPhone, look at the SmartServer documentation, in the SmartServer Configuration Guide section.

Using SmartCmd

SmartCmd is a small utility that you can use to gain quick access to frequently used SmartPhone 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 SmartPhone 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 SmartPhone tray menu.
CallLog	Displays your Call History . You may also use Show Call History .
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 SmartPhone.

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

Dial	Dials an external telephone number as specified by <number> .
TAPIDial	Dial the telephone number specified by <number> using a TAPI PBX.

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

ExtACB	If the logged in user already has a SmartPhone 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=ExtText}{Date=<date>}{Ext=<ext>}{Text=<text>}[{Display=<display>}]**
 Description: Sends a SmartPhone 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 SmartPhone 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 SmartPhone 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=ShowMsg}{Id=<msgid>}**
 Description: Displays the SmartPhone 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.

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

Setting up SmartTSP

To turn the SmartTSP on, you should be able to simply go into the **SmartPhone 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 Tiger Software who will be happy to advise you of what needs to be done.

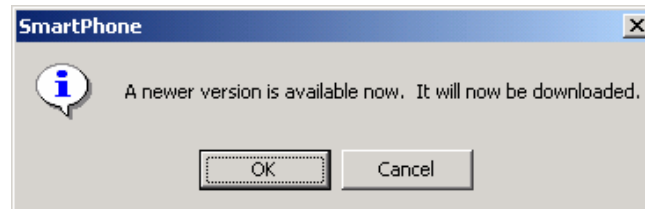
Removing SmartTSP

If you no longer wish to use SmartTSP and would like it removed from your system, simply clear the **Enable Tapi** checkbox from the **SmartPhone** Configuration screen. You may optionally delete the **SmartTSP.dll** file from your System directory.

Your computer may need rebooting after enabling or disabling SmartTSP.

Keeping SmartPhone Up-to-date

To ensure that keeping all the clients running the same version of SmartPhone is easy, your system administrator may have set up SmartServer to automatically send updates of SmartPhone to your computer when you load up SmartPhone. If this is the case, and you are running an outdated version of the client software, when SmartPhone 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 SmartPhone. 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 SmartPhone connect to the Internet to download updates of SmartPhone. Your system administrator obtains them from an authorised Tiger Software distribution point and they are stored on one of your company's file servers.

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

Using Plugins

There are a number of Plugins available for SmartPhone that help it integrate fully with local (or stand-alone) database applications such as Access, Sage Line 50, Goldmine, or even the Contacts folder in Microsoft Outlook.

If you use a database application on your local machine that you would like SmartPhone to search, but you do not want to make the data publicly available to all SmartPhone users, contact Tiger Software to see if there is a Plugin available for it yet. New Plugins for different databases are being developed all the time.

Another great advantage of Plugins is that when a contact calls in, rather than popping the data in SmartPhone where only limited functionality may be available, SmartPhone will display the actual record pertaining to the caller from within your database.

If your system administrator gives you access to a Plugin, it will be downloaded onto your machine the next time you start SmartPhone and you will see one new tab appear on your **SmartPhone Configuration** window for every Plugin that you are using.

The configuration of each of the different Plugins is relatively similar. You simply tell the Plugin where the database you wish to use is located, which tables contain the telephone numbers you want to search, and whether or not you want to make copies of the contacts found in your local database available in the global SmartServer directory.

For more help with a specific Plugin, please contact Tiger Software.

SmartPhone Frequently Asked Questions

Contents

Part 1: Loading SmartPhone

How do I stop SmartPhone from loading every time I start my computer?
How do I make SmartPhone load every time I start my computer?

Part 2: Phone screen

How do I stop the **Phone** screen from popping?
How do I make the **Phone** screen pop up?
How do I make the **Phone** screen hide when I hang up?
How do I stop the **Phone** screen from hiding when I hang up?
Can I answer my telephone from the **Phone** screen?
Can I hang up my telephone from the **Phone** screen?
Can I put people on hold from the **Phone** screen?
How do I view the **Extension Status** screen from the **Phone** screen?
Why does the **Phone** screen say that I am on a call when I am not?

Part 3: Address Book screen

How do I search for numbers from the **Address Book**?
How do I search for names from the **Address Book**?
Can I search for part of a number from the **Address Book**?
How do I dial from the **Address Book**?
How do I view all entries that begin with a certain letter from the **Address Book**?
How do I change which list of telephone numbers I use to find names in the **Address Book**?
Where do I find extra information about a contact?
Why can't I see the Call History of a contact?
Why can't I view the **Address Book**?
Why can't I edit details in the **Address Book**?

Part 4: Extension Status screen

Why is the **Extension Status** screen blank?
Why am I not on the **Extension Status** screen?
Why are some extensions not shown on the **Extension Status** screen?
How do I change the name shown next to my extension in the **Extension Status** screen?
How do I change which department I am shown under in the **Extension Status** screen?
How do I dial another extension from the **Extension Status** screen?
Is it possible to view another users Call History from the **Extension Status** screen?
Why are some icons on the **Extension Status** screen grey?
How do I make the **Extension Status** screen show only numbers instead of names and numbers?

Part 5: Call History screen

Why are some calls that I made a while ago not in the **Call History** screen?
What does **Missed calls** mean?
Why are some calls that are shown in the Missed/External/Internal calls list not in the **All calls** list?
Why does the **Name** column contain place names instead of caller names for some calls?
What does **<Unknown>** mean in the **Telephone** column of the **Call History** screen?
Why can't I view my Call History?
Can I have a larger Call History?
How does SmartPhone recognise local numbers?
How does SmartPhone know which town the caller is in?
Why is the town SmartPhone shows wrong?

Part 6: General

How do I change which extension I am logged in as?
Can I set a password for my extension so people cannot log in as me?
Can I stop SmartPhone from asking me to enter my user name/password every time SmartPhone loads?
How do I make SmartPhone prompt me for a user name/password when it loads?
How do I quit SmartPhone?
Why can't I dial from any of the screens in SmartPhone?
Why can't I change my name or department?
Now that I have CTI, can I dial from other programs?
Can SmartPhone integrate with other applications on my desktop?
Is there an easier way to access the SmartPhone features?

Part 1: Loading SmartPhone

How do I stop SmartPhone from loading every time I start my computer?

If you wish to disable SmartPhone from loading automatically when your computer starts, click **Start**, point to **Settings** and click **Taskbar & Start Menu...** On the **Taskbar Properties** screen that appears, click the **Start Menu Programs** tab. Click the **Remove...** button. On the **Remove Shortcuts/Folders** screen that appears, click the + next to the **Startup** icon, then highlight the **SmartPhone** entry and click **Remove**. Finally, click **Close**, then **OK**. SmartPhone will now no longer start when your computer does.

If you are running Windows 2000, Windows XP, or later, simply click **Start**, **Programs**, **Startup** and then right-click on the **SmartPhone** icon in the list and select **Delete** from the context-menu.

How do I make SmartPhone load every time I start my computer?

SmartPhone should be set to load automatically when your computer starts; however, if you used the steps above to remove SmartPhone from the **Startup** folder, you may do the following to restore it. Click **Start**, point to **Settings** and click **Taskbar & Start Menu...** Click the **Start Menu Programs** tab and then click the **Add...** button. Click the **Browse...** button on the **Create Shortcut** screen that appears. Next, browse to the directory that you entered when you installed SmartPhone. This is **C:\Program Files\SmartPhone** by default. Highlight the **SmartPhone** icon from the list and click **Open**. Back in the **Create Shortcut** screen, click **Next >**. Scroll down, highlight the **Startup** folder, and click **Next >** again. Enter **SmartPhone** for the shortcut name and click **Finish**. Click the **OK** button to close the **Taskbar Properties** screen and SmartPhone will now start every time your computer starts.

Alternatively, if the **SmartPhone** icon that you deleted is still in your computer's **Recycle Bin** you can simply open the **Recycle Bin** (by double-clicking on it), select the **SmartPhone** icon, and select **Restore** from the **File** menu.

Part 2: Phone screen

How do I stop the Phone screen from popping?

The **Phone** window can be set to appear every time you make a call from your extension and every time your extension receives a call. If you wish to prevent this from happening, click the SmartPhone icon in the System Tray (bottom-right corner near the clock) and click **Configure** from the menu that appears. Click the **Interface** tab and clear the **Pop on inbound** and **Pop on outbound** boxes to prevent the **Phone** screen from appearing when calls are received / made respectively. Click **OK** and the **SmartPhone Configuration** screen will close after saving the new options.

How do I make the Phone screen pop up?

Click the SmartPhone icon in the System Tray (bottom-right corner of the screen near the clock) and click the **Configure** menu item. On the **SmartPhone Configuration** screen, click the **Interface** tab.

Check the **Pop on inbound** checkbox to make the **Phone** screen pop when calls are received. Check the **Pop on outbound** checkbox to make the **Phone** screen pop when calls are made. Click **OK** to save changes and close the **SmartPhone Configuration** screen.

How do I make the Phone screen hide when I hang up?

Click the SmartPhone icon in the System Tray (the green or red circle near the clock) and click **Configure**. On the **SmartPhone Configuration** screen, click the **Interface** tab and click to check the **Hide on cleardown** checkbox. Click **OK** to save changes and close the **SmartPhone Configuration** screen. The **Phone** screen will now hide when you hang up your telephone.

How do I stop the Phone screen from hiding when I hang up?

Click the green or red circle that represents the SmartPhone icon (in the System Tray, near the clock) and click **Configure**. Click the **Interface** tab on the screen that appears and click to clear the **Hide on cleardown** checkbox. Click **OK** and the **Phone** screen will no longer disappear when you hang up.

Can I answer my telephone from the Phone screen?

You can set up 0, 4, or 8 buttons to be shown on the bottom of your **Phone** window. Set one of these buttons to be **Answer** or **Answer/Hangup** and when you click the button, your extension will be put into speakerphone mode and the call will be answered. For more information on setting up buttons, see the document: Getting More Out Of SmartPhone.

Can I hang up my telephone from the Phone screen?

You can set up 0, 4, or 8 buttons to be shown on the bottom of your **Phone** window. Set one of these buttons to **Hangup** or **Answer/Hangup** and when you click the button, SmartPhone will hang up your extension for you, disconnecting the currently active call. For more information on setting up buttons, see the document: Getting More Out Of SmartPhone.

Can I put people on hold from the Phone screen?

Set up a **Hold/Unhold** button for your extension. Now, on the **Phone** window, you can click **Hold** when you have an active call and the active call will be put on hold. For more information on setting up buttons, see the document: Getting More Out Of SmartPhone.

How do I view the Extension Status screen from the Phone screen?

You can create a button (**Show Extensions**) that will appear on your **Phone** window. When you click the button, the **Extension Status** screen will be displayed above all open windows. For more information on setting up buttons, see the document: Getting More Out Of SmartPhone.

Why does the Phone screen say that I am on a call when I am not?

If, for some reason, the machine running SmartServer is restarted or turned off when you are in the middle of a phone call, SmartPhone will have no way of knowing when the phone call ends. This means the **Phone** screen will think you are still on a call. If this ever happens, you will have to restart SmartPhone. First, click the SmartPhone icon (the red circle) in the System Tray and click **Unload** from the menu that appears. Then, click **Start**, point to **Programs**, point to **SmartPhone** and click the **SmartPhone** item.

NB In this instance, although SmartPhone will be giving you inaccurate information, other user's Extension Status screens will show the correct information (that you are not on a call).

Part 3: Address Book screen

How do I search for numbers from the Address Book?

To search for a telephone number from the **Address Book** screen, enter the telephone number to search for in the **Number** box and click **Go** or press **<return>** on your keyboard. A list of contacts that have that telephone number will fill the list.

How do I search for names from the Address Book?

Make sure the **Number** box is empty and enter the contact/company name in the **Text** box. Then click **Go** or press **<return>** on your keyboard. All contacts that contain the text you entered will fill the list.

Can I search for part of a number from the Address Book?

Yes. Just enter the part of the number you know in the **Number** box (making sure the **Text** box is clear). For instance, to search for all contacts that have **3280** in their telephone number, enter **3280** in the **Number** box and click **Go** or press **<return>**. You may also search for part of a name, for instance every company with the word **Tech** in their name by entering **Tech** in the **Text** box.

How do I dial from the Address Book?

To call someone from the **Address Book** screen, search for the contact you wish to dial, highlight them in the list and click the **Dial** button. If the contact has more than one telephone number (e.g. company, cellular, home) a list will appear. Click on the number you wish to dial and it will start ringing.

How do I view all entries that begin with a certain letter from the Address Book?

If your system has Alpha searching enabled, there will be an alphabetical index on the right-hand side of the **Address Book** screen. Depending on how your system is set up, clicking one of these buttons will either bring up all contacts whose name begins with that letter, or whose company name begins with that letter. If you have a large contact list and select a popular letter, it may take a few moments to fill the list.

How do I change which list of telephone numbers I use to find names in the Address Book?

If your system is configured to use more than one Address Book, you may choose which one you use when searching. You do this by selecting the appropriate item from the **Folder** drop-down list at the top of the **Address Book** screen.

Where do I find extra information about a contact?

SmartPhone does more than just store a contact's name and telephone numbers. Highlight a contact from the list on the **Address Book** screen and click the **Show** button. A new screen will appear showing the selected contact's name, company name, telephone numbers, address, and, on the **Extra** tab, custom information that your system administrator has included in the Address Book. There is also a **History** tab where, if you have clearance, you can view the last 50 calls made/received to/from that contact.

Why can't I see the Call History of a contact?

Your system administrator can set which SmartPhone features you have access to and which you do not. If you cannot see the Call History of a contact, it is because your system administrator has turned that feature off for your extension. Contact your system administrator if you feel you should be allowed to view contact history.

Why can't I view the Address Book?

The **Address Book** is a feature of SmartPhone that not all users can have access to. Only those users that have been granted the privilege of viewing the **Address Book** screen by the system administrator may do so. If you need access to the **Address Book** screen, but have not got it, contact your system administrator.

Why can't I edit details in the Address Book?

Editing Address Books is something that only users who have been granted the ability by the system administrator may do. This is to prevent mistakes making your Address Book data being wrong. If you need to make a change to one of the Address Books, ask your system administrator.

Part 4: Extension Status screen

Why is the Extension Status screen blank?

If SmartServer is no longer running, or if you lose your network connection to SmartServer, SmartPhone will not be able to retrieve the list of extensions from SmartServer. When this happens, the **Extension Status** screen will be blank. Check that SmartServer is running and then re-load SmartPhone.

Why am I not on the Extension Status screen?

Your system administrator has the ability to exclude certain extensions from the **Extension Status** screen. If your extension has been excluded and you believe it shouldn't have been, contact your system administrator.

Why are some extensions not shown on the Extension Status screen?

As explained above, the system administrator can exclude extensions from being displayed on the **Extension Status** screen (e.g. fax lines/dial-up connections). Also, some extensions may not have been entered in SmartServer Configuration. If there are extensions missing that you believe would be useful to show, contact your system administrator.

Why can I only see my department on the Extension Status screen?

The privilege to be able to see extensions in other departments must be set by your system administrator. This feature is useful for large companies to help keep the size of the **Extension Status** screen small. Also, in most situations, only reception would need to see the status of all the extensions in the company.

How do I change the name shown next to my extension in the Extension Status screen?

Your system administrator sets the name shown next to your extension lamp on the **Extension Status** screen initially. To change it, open the **SmartPhone Configuration** screen (click **Configure** from the tray menu) and type a new name in the **Name** box.

NB Your system administrator may have disabled your ability to change your name.

How do I change which department I am shown under in the Extension Status screen?

Open the **SmartPhone Configuration** screen (by clicking **Configure** from the tray menu). Enter a new department in the **Department** box. Click **OK** and you will be shown under a new department in the **Extension Status** screen.

NB Your system administrator may have disabled your ability to change your department.

How do I dial another extension from the Extension Status screen?

Click the extension you wish to dial and click **Dial**. If you are already on a call, clicking the extension will give you the choice of either putting the current call on hold and talking to that extension (click

Consult) or transferring the call to that extension unannounced (click **Transfer**). If you **Consult** with another extension and then hang up, the call you were originally on will be transferred to the extension you were just talking to.

Is it possible to view another users Call History from the Extension Status screen?

Only users who have the right privileges may view others Call Histories from the **Extension Status** screen. Your system administrator can set **Call History** viewing privileges.

Why are some icons on the Extension Status screen grey?

If there is a problem with an extension, such as if there is a break in the line, or if the extension is not plugged in to the wall socket, SmartServer cannot tell the state of the extension. Therefore, when SmartPhone loads the **Extension Status** screen, it doesn't know whether to make an icon's extension lamp green (on hook) or red (off hook) so it leaves the lamp grey, to signify it being turned off.

How do I make the Extension Status screen show only numbers, instead of names and numbers?

To change what is displayed in the **Extension Status** screen next to the lamps, open the SmartPhone **Configuration** screen, click on the **Interface** tab and click to check or clear **Show name** to either show or hide names on the **Extension Status**.

Why is this extension yellow on the Extension Status screen?

A yellow lamp indicates that particular extension is unavailable due to a forward being in effect on their telephone. If you hover your mouse over them, you will see a ToolTip telling you which types of calls are being forwarded, e.g. All calls, Internal calls etc and the name and number of the person that calls are being diverted to. The forward is turned on using the phone system (or by making use of the quick feature list in SmartPhone)

Part 5: Call History screen

Why are some calls that I made a while ago not in the Call History screen?

Although SmartPhone stores information on all the calls you make/receive, only the 50 latest calls are shown in the **Call History** screen. This is to keep the time taken to load the **Call History** screen to a minimum. Using the **Type** drop-down list, you can display Internal, External, or Missed calls on the **Call History** screen as well as All calls. This can enable older calls to be shown than if you were just showing All calls. Administrators can use SmartServer's **Export Calls** tool to see more than the last 50 logged calls, or they can use Statistics Manager for in-depth reporting on logged calls.

What does Missed calls mean?

Missed calls are inbound and outbound external calls (i.e. not calls between local extensions in the company) that ended before they were answered. For example, a customer called but hung up before the telephone was answered. If you made a call and nobody answered, the call is shown as being of type **No answer**.

Why are some calls that are shown in the Missed/External/Internal calls list not in the All calls list?

The **Call History** screen only shows the latest 50 calls of any given type. So if you made 70 internal calls, then 50 external calls, then missed 30 calls, the missed calls and 20 of the external calls would be shown on the All calls list (because they are the latest 50). The last 50 internal calls would be shown on the Internal calls list. All 50 external calls would be shown on the External calls list and all the missed calls would be shown on the Missed calls list.

Why does the Name column contain place names instead of caller names for some calls?

If the telephone number was not in any Address Books in use by SmartPhone, SmartPhone automatically uses the place name according to the area code in the telephone number. If the telephone number is a cellular number (i.e. **07...**), SmartPhone specifies (**Mobile Services**) for the **Name** field. If the number is a special service (e.g. **08...**, **09...**) SmartPhone specifies (**Special Services**) for the **Name** field.

What does <Unknown> mean in the Telephone column of the Call History screen?

If **<Unknown>** is displayed in the **Telephone** column, it means the caller was calling from a telephone system that does not give out telephone numbers (or they deliberately withheld their number).

Why can't I view my Call History?

Either you haven't made or received any calls since SmartServer was installed, or your system administrator has disabled viewing the **Call History** screen on your extension.

Can I have a larger Call History?

Although a larger number of calls are stored, with the current version of SmartPhone the number of calls that can be displayed in the **Call History** screen is limited to 50. However, this situation may change in a later release of SmartPhone.

How does SmartPhone recognise local numbers?

When your System Administrator configures SmartServer, they enter the area code of the town where your site is located. Whenever you dial a local telephone number without an area code in front, this number is automatically added to the front of the dialled telephone number.

How does SmartPhone know which town the caller is in?

Tiger Software regularly acquires a list of area codes from OfTel, which is used in SmartPhone to match area codes with place names.

Why is the town SmartPhone shows wrong?

If the place name shown by SmartPhone is incorrect, it is because the list of area codes you have is out of date. Please contact Tiger Software and we will be happy to update your version of SmartPhone to include the new/changed area code(s).

Part 6: General

How do I change which extension I am logged in as?

If you want to be logged in as a different extension, open the **SmartPhone Configuration** screen (by clicking the SmartPhone icon in the system tray and clicking **Configure**), delete the number in the **Extension** box and enter a new one. Click **OK** or **Apply**. If the extension you chose has a password, you will be prompted to enter it. You will now be logged in as a different extension.

Can I set a password for my extension so people cannot log in as me?

Yes. Click the SmartPhone icon in the system tray and choose **Configure** from the menu. Next enter a password in the **Password** box, click **OK** and now every time you try to start SmartPhone, you will be asked to provide your password (unless you choose to Auto login, in which case you will only be asked for a password if you try to log in from a different computer or from a different logon account).

Can I stop SmartPhone from asking me to enter my extension/password every time SmartPhone loads?

Check the **Auto login** box when SmartPhone asks you to enter your extension number and password. Alternatively, go to the **SmartPhone Configuration** screen and check the **Auto login** box there instead.

Now, whenever you start SmartPhone you will not be prompted for your extension number or password. However, the **Auto login** setting is stored by SmartPhone on a per user, per computer basis. This means that if you start SmartPhone from a different computer, or use the same computer but log on to the network with a different user name, SmartPhone will once again ask you to enter your extension number and password.

How do I make SmartPhone prompt me for an extension/password when it loads?

To make SmartPhone prompt you for an extension/password every time it loads, select **Configure** from the SmartPhone tray menu and click to clear the **Auto login** checkbox.

How do I quit SmartPhone?

Click the SmartPhone icon in the bottom right corner of your screen (i.e. the green or red circle next to the clock) and click **Unload** on the menu that opens.

Why can't I dial from any of the screens in SmartPhone?

Your system administrator has disabled your ability to dial from SmartPhone. You should still be able to dial manually (using your telephone). If you feel you should be able to dial from SmartPhone, contact your system administrator.

Why can't I change my name or department?

Your system administrator has not enabled the option to let you edit your own name/department. If the information is incorrect and needs changing, consult your system administrator.

Now that I have CTI (Computer Telephony Integration), can I dial from other programs?

The SmartTSP that was installed on your computer when you installed SmartPhone gives you the ability to dial from any application that supports TAPI (Telephony Application Programming Interface).

NB: The SmartTSP is not guaranteed to work with all applications or on all computer configurations. Tiger Software has tested the TSP with Windows 95, 98, NT, 2000, and XP.

Can SmartPhone integrate with other applications on my desktop?

You can use scripts to integrate with other applications, such as databases or accounts programs. Scripts are written in the popular VBScript language and can be custom written for you by Tiger Software. To enable you to use a script, your system administrator must use SmartServer Configuration to install and enable the script on your extension.

SmartPhone also supports Plugins – small libraries of code that SmartPhone can utilise to enable enhanced communications with many popular desktop applications such as Goldmine and ACT!

Is there an easier way to access the SmartPhone features?

Yes. Using the SmartCmd program that is installed with SmartPhone, you can have direct access to SmartPhone screens from the command line, or with assigned hotkeys. Hotkeys are combinations of keys pressed at the same time that can be used to load programs that are in your **Start Menu** or on your **Desktop**.

To find out how to use SmartCmd, look in the document entitled Getting More Out Of SmartPhone.