

PhoneLink for Outlook is an add-in for Microsoft® Outlook® that manages inbound calls to multiple call appearances on a Tone Commander 7210, 7220, 7310, or 7320 VoIP telephone. Ringing, active, and held calls are shown in a popup window. You can answer calls or place calls on hold with a single click. PhoneLink for Outlook integrates with Outlook's Contacts for incoming call identification. Call details are recorded in Outlook's Journal.

The Tone Commander 'TAPI Service Provider: 7200/7300 series' driver allows Outlook and other Windows applications to place and manage calls through a 7210, 7220, 7310, or 7320 VoIP telephone. This driver is installed along with PhoneLink.

System Requirements

Computer: Pentium II, 350 MHz minimum

Operating System: Microsoft Windows XP, 2000, 98

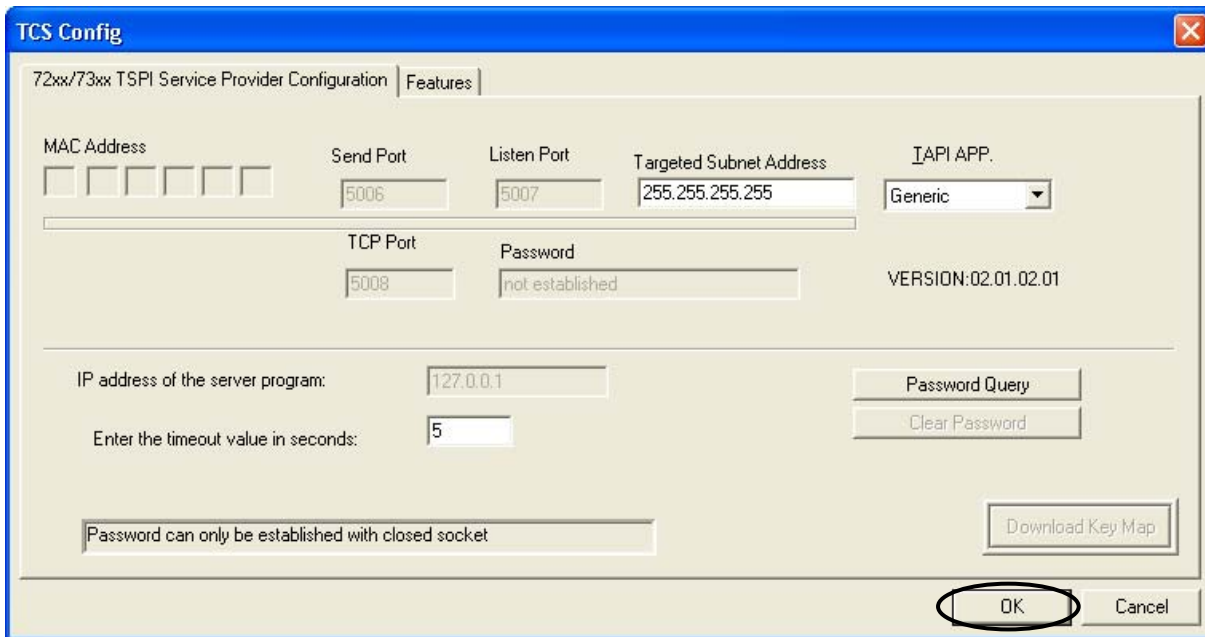
Microsoft Outlook: 2003, 2002, 2000, 98

Application and Driver Installation

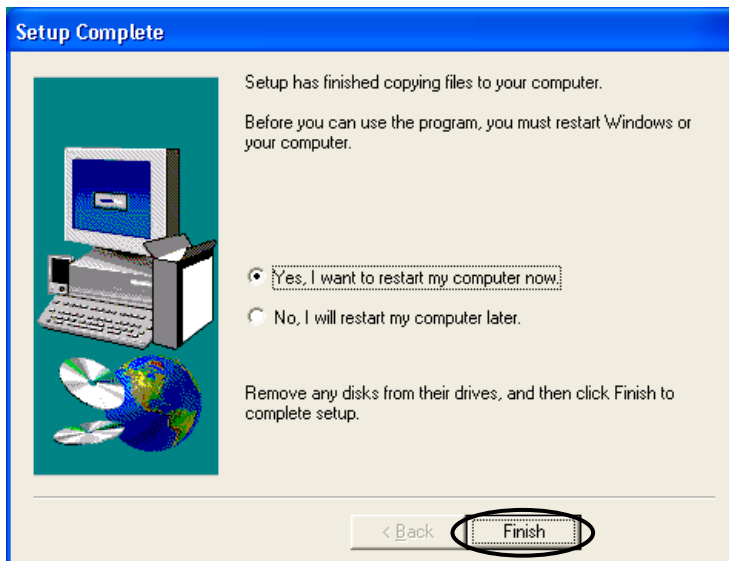
Uninstall any previous version of PhoneLink for Outlook or and/or the VoIP TSPI driver from the Windows "Add or Remove Programs" control panel.

You must be a member of the local Administrators user group to install PhoneLink for Outlook on a computer running Windows 2000 or Windows XP. Do not use "Run As" to install as a different user than the currently logged-on user.

1. Close any running applications.
2. Double-click the **PhoneLink_Setup_Vxxxx.exe** program.
3. Click the **Yes** button, then the **Next** button, to proceed with installation.
4. Read the displayed license agreement, and click the **Yes** button if you agree to the license terms. The PhoneLink program and TSPI driver files will be copied to your computer.
5. The "TCS Config" dialog will appear. Click the **OK** button.



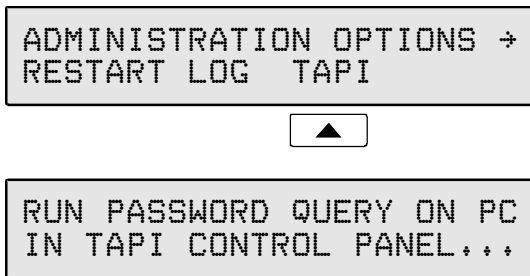
6. Click the **Finish** button. Your computer will restart.



7. Connect the computer's network interface to the phone's **PC** connector using a standard 10/100 BaseT cable.

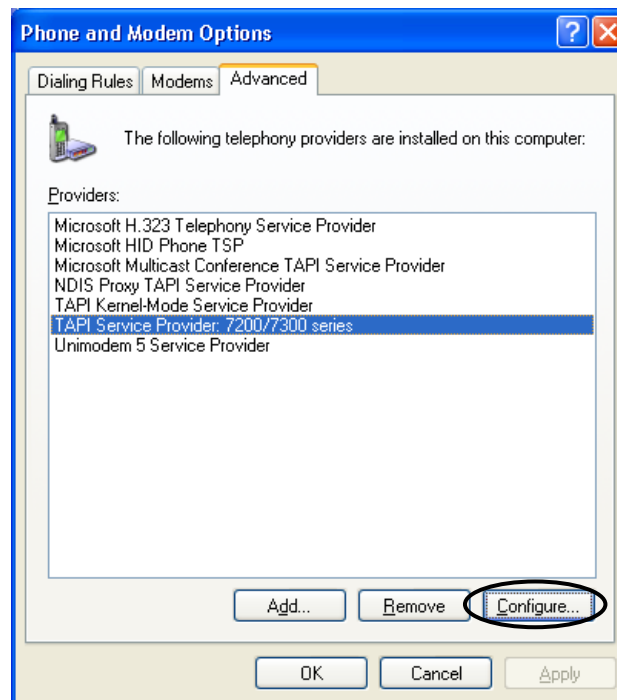
NOTE – The computer and phone must be on the same network.

8. 7310/7320: While the phone is idle, select TAPI (**Setup** → ADMIN → **More** → TAPI) from the phone's Administration Options menu.



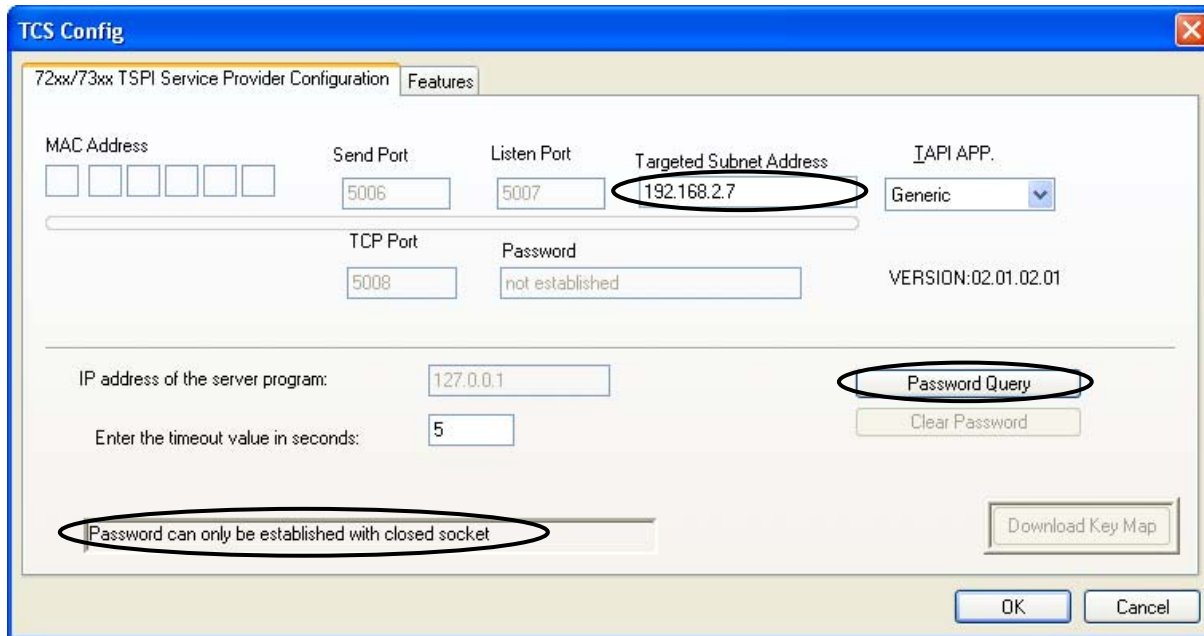
7210/7220: While the phone is idle, disconnect the phone from the network.

9. From the Start Menu, select Settings - Control Panel.
10. Double-click the **Phone and Modem Options** or **Telephony** icon. You may need to enter your area code before proceeding.
11. If the window has multiple tabs at the top, click the **Advanced** or **Telephony Drivers** tab.
12. In the Phone and Modem Options Control Panel, select **TAPI Service Provider: 7200/7300 series**, then click the **Configure** button.



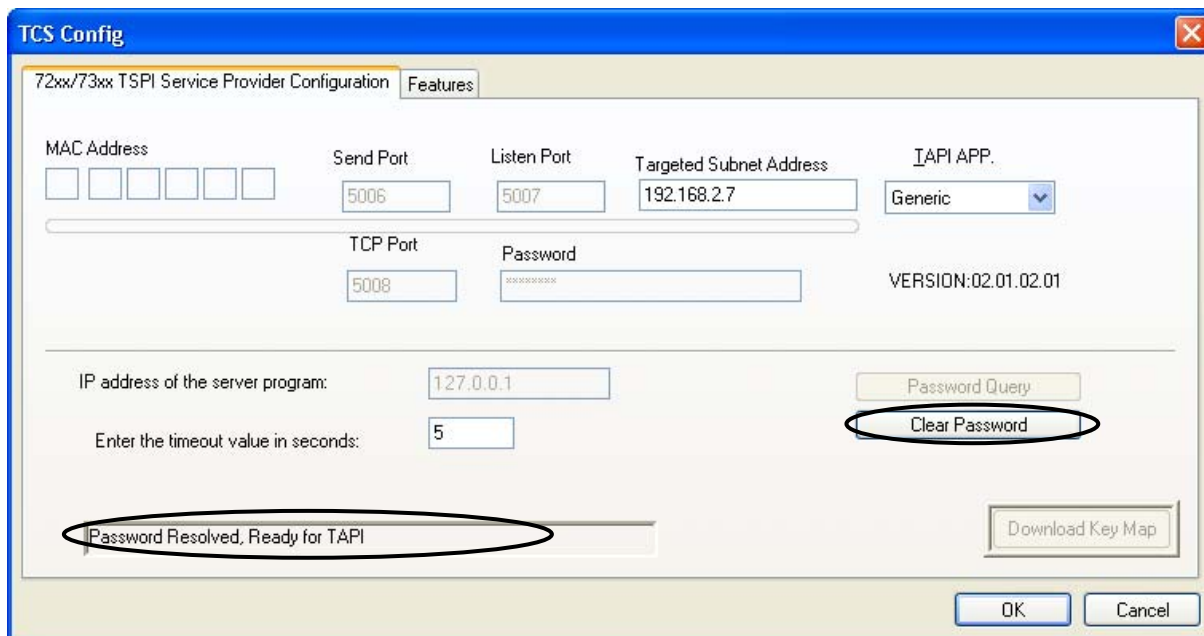
The "TCS Config" dialog will appear.

13. Change the **Targeted Subnet Address** to the subnet (*not* the subnet mask) of the phone; for example, 192.168.2.7.



14. Click the **Password Query** button in the TCS Config dialog to request a password from the phone. The message area in the dialog will indicate that a valid password was received.

NOTE – If the phone is reset (**Setup** → **INSTL** → **More** → **RESET**), new software has been loaded into the phone, or PhoneLink has been re-installed, the password stored in the PC will no longer be valid. Click **Clear Password**, then repeat the password query.



15. Click the **OK** button.
16. Close the **Phone and Modem Options** or **Telephony Control Panel**.
17. **7310/7320**: Press the **Setup** key to exit the TAPI password option.
7210/7220: Reconnect the phone to the network.

TSPI Driver Setup

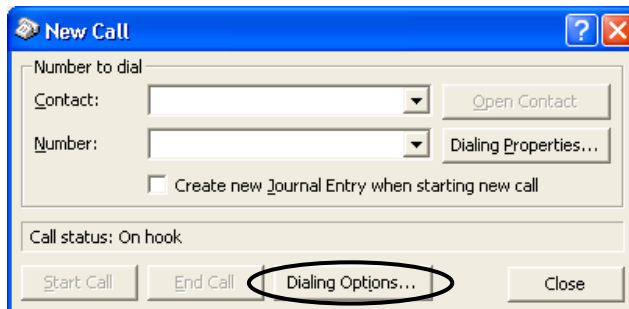
BEFORE PROCEEDING –

- Outlook 2003, 2002, 2000, or 98 must be installed on your computer.
- The phone must be operating and connected to the computer serial port.

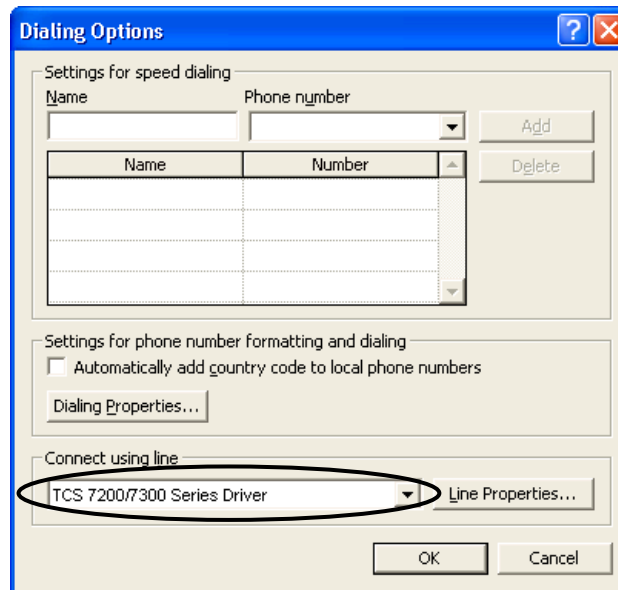
Driver selection for PhoneLink is automatic. The steps in this section set up Outlook to use the Tone Commander driver for call dialing.

Outlook Driver Selection

1. Open Outlook. PhoneLink will automatically start.
2. Select **Contacts** in the Outlook Bar or folder list.
3. On the **Actions** menu, point to **Call Contact**, and then click **New Call**.



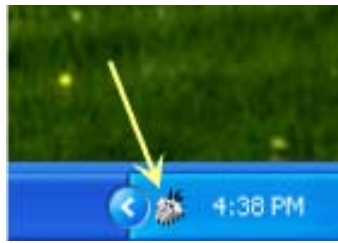
4. Click the **Dialing Options...** button.



5. In the **Connect using line** box, select **TCS 7200/7300 Series Driver**. You may need to scroll down the list to see this driver.
6. Click the **OK** button.

Using PhoneLink for Outlook

PhoneLink will open automatically when you start Outlook, and it closes when Outlook is closed. Whenever PhoneLink is running, an icon is shown in the system tray. This icon will flash when a call is ringing. Right-clicking the icon brings up a menu with several options, described on pages 8 and 9.



A popup window is shown on screen whenever inbound calls are active, ringing, or on hold at call appearances on the telephone. You can move the window to any location on the screen by dragging the title bar. Click the [X] Close button in the upper right corner to hide the window until the next call rings.



Details for each call are displayed in colored bars in the popup window, with the most recent call at the bottom.




The first line in each call bar shows the call appearance (telephone button) number, followed by the called number if available. If the **Lookup Called Number** option is selected, and an Outlook contact is found with a phone number that matches the called number, the name from the contact is shown in place of the called number.

The second line shows the contact name if an Outlook contact is found with a phone number that matches the calling number, or the calling number if no match is found. This line is blank if the calling number is not available.

If a contact match was found, the third line shows the caller's company name, if available from the contact.

NOTE – By default, only Business and Mobile contact phone numbers in Outlook are searched for called and calling number matches; see Phone Type Lookup on page 9 to search in other phone number fields.

The state of a call is indicated by the bar color and the telephone icon; see the table on the following page. Left-click on a call bar to invoke the default action as shown below in bold print, or right-click to display a menu of actions you can select for the call. Available actions depend upon the call state.

Call Type	Color	Icon	Menu Actions (Left-click default shown in Bold)
Ringing Call	Yellow		Answer Add Contact <i>or</i> View/Edit Contact
Active Call	Green		Hold Disconnect Add Contact <i>or</i> View/Edit Contact
Held Call	Red		Un-hold Add Contact <i>or</i> View/Edit Contact

Answering Calls

Click a yellow call bar to answer a ringing call. The call state will change to Active. Any currently connected call will be placed on hold.

Holding Calls

Click a green call bar to place an active call on hold. An active call will be automatically held when you answer or place another call.

Click a red call bar to retrieve a held call.

NOTE – Calls dialed from Outlook, and automatically placed on hold, must be retrieved from the telephone.

Disconnecting Calls

Right-click an active or held call, then select **Disconnect** from the popup menu.

Viewing or Editing a Contact

If an Outlook contact was found that matches the calling number for an active or held call, you can open the contact for viewing or editing. Right-click the call bar, then select **View/Edit Contact**.

Adding a Contact

If no Outlook contact was found that matches the calling number, you can create a new contact. Right-click the call bar, then select **Add Contact** to open a new Outlook contact with the calling number entered into the Business phone number field.

Placing Calls

Select or open a contact in Outlook. Click the telephone icon in the toolbar to open a dialing dialog. If the contact has multiple phone numbers, select the number to dial. Click the **Start Call** button to dial the call.

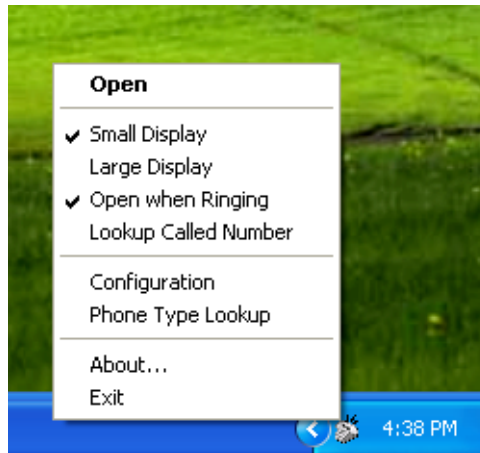
Call Journaling

Call details are recorded in the Outlook Journal for incoming calls. An option in the dialing dialog selects journaling for individual outgoing calls. Journal entries for all outgoing calls can be created for a contact by selecting the contact's "Automatically record journal entries for this contact" option.

Program Options

If the call window is not visible, double-click the PhoneLink icon in the system tray to show the window.

Right-click the icon to show a menu with several program options.



Open

Select Open to show the call window.

Display Options

The Large Display option enlarges the call window, allowing you to see call activity when you are not close to the computer monitor. The program default setting is Small Display.

Open when Ringing

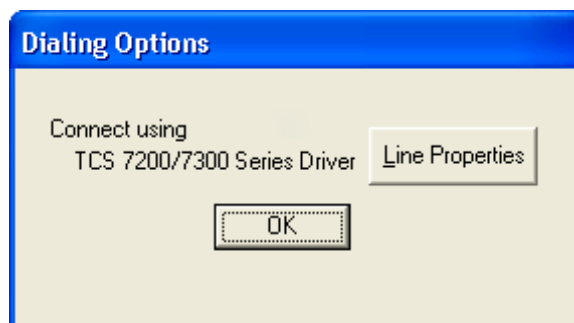
With this option selected (program default), the call window will open and appear on top of other windows when a call rings. To keep the call window hidden, deselect Open when Ringing.

Lookup Called Number

Select this option to search for a match in Outlook's contacts with the called party number. When this option is selected, incoming call display will be delayed during the name search; this can affect performance on slower computers and on systems with a large number of contacts.

Configuration

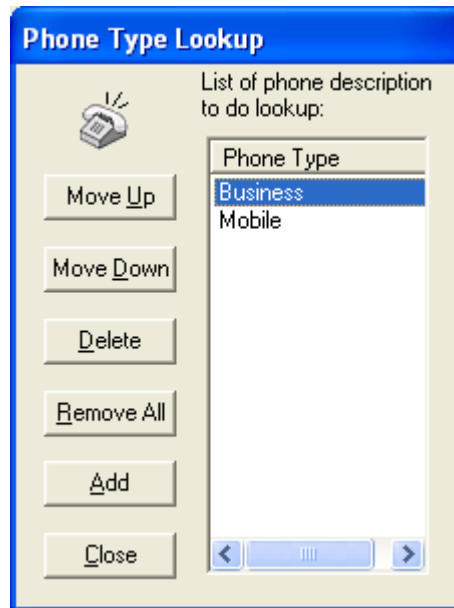
This item displays the currently selected TSPI driver. Click **Line Properties** to change TSPI driver settings; see page 4.



Phone Type Lookup

The program searches for calling and called numbers in the Business and Mobile phone number contact fields by default. You can select additional phone number types to search with the Phone Type Lookup option.

NOTE – Adding more phone number types to the list increases the time required to look up a number. This can affect performance on slower computers and on systems with a large number of contacts.



Click **Add** to select a phone type to add to the search list. To delete a phone type, click in the **Phone Type** list to highlight a phone type, then click **Delete**. **Remove All** deletes all phone types.

Move Up and **Move Down** moves the selected type up or down in the list; phone types higher in the list are searched first.

About...

Select this item to display PhoneLink for Outlook program version information.

Troubleshooting

Symptom	Troubleshooting Action
<p>When Outlook is opened, the telephone icon does not appear in the system tray.</p>	<p>Using the PC, select Control Panel/Add-Remove Programs. Verify that "PhoneLink for Outlook App and Driver" is listed. If is not, reinstall PhoneLink.</p> <p>If it is listed, select Control Panel/Telephony/Telephony Drivers tab (Windows 98) or select Control Panel/Phone and Modem Options/Advanced tab (other Windows versions). Verify that "TAPI Service Provider; 7200/7300 series" is listed. If is not, reinstall PhoneLink.</p>
<p>When Outlook is opened: a PhoneLink pop box appears stating that the "phone is not detected", and the telephone icon does not appear in the system tray.</p>	<p>Verify that both the PC and the phone are connected to the same subnetwork.</p> <p>Verify that a security password has been previously negotiated between the phone and the TSPI driver. In the Phone and Modem Options Control Panel, select "TAPI Service Provider: 7200/7300 series", then click the Configure button. In the TCS Config dialog, the Clear Password button should not be grayed out.</p> <p>Reboot the PC.</p>
<p>When Outlook is opened, the telephone icon appears in the system tray; however, when an inbound call arrives at the phone, the 'Tone Commander Telephone' pop box does not appear at the desktop.</p>	<p>Verify that the Open when Ringing option in the PhoneLink menu is selected.</p> <p>Verify that the CA/DN key where the call is arriving is set for immediate ringing (KEYnn=ALWAYS RING), using the USER/RING/CONTROL menu.</p> <p>Verify that the phone is neither in the CALL or SETUP menus.</p>
<p>When an inbound call arrives, the corresponding call bar within the 'Tone Commander Telephone' pop box does not include a calling party number.</p>	<p>Verify that there is a calling party number showing in the phone display.</p>
<p>Upon answering a call via the application, another call arrives. When the call bar for the second call is clicked, the first call is disconnected.</p>	<p>Verify that network provisioning for the associated ISDN phone is optioned for Auto-hold (versus auto-drop).</p>
<p>When attempting to originate an outbound call via Outlook Contacts view, a pop box appears stating that "an internal error affecting the automatic phone dialer has occurred".</p>	<p>Using the PC, select the Outlook Contacts view. Select any contact file, then select the telephone icon in the tool bar. With the Dial Phone dialog box showing, click the Dialing Options button.</p> <p>Verify that "TCS 7200/7300 Series Driver" is selected in the "Connect using line" text field. If it is not the driver selected, select it using the drop down list, then click the OK button.</p>

Support

If you experience any difficulties using PhoneLink for Outlook, please contact Tone Commander Customer Technical Support for assistance.

Tone Commander
Technical Support Department
11609 49th Place West
Mukilteo, WA 98275-4255 USA

Phone: (425) 349-1000
(800) 524-0024

Fax: (425) 349-1010

E-mail: tech@tonecommander.com

Web: www.tonecommander.com

Tone Commander is committed to meeting the product needs of our customers. Please write or call us with any suggestions for improvement.

