

PhoneLink® for Outlook is an add-in for Microsoft® Outlook® that manages inbound calls to multiple call appearances on a Tone Commander ISDN telephone. Ringing, active, and held calls are shown in a popup window. You can answer calls, transfer 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: 6200 series" driver allows Outlook and other Windows applications to place and manage calls through an 8810, 8610, or 8620 ISDN telephone equipped with an optional 8001TA, 8003TA, 8004TA, or 8005TA Terminal Adapter, or a 6210 or 6220 ISDN telephone equipped with an optional 6001TA Terminal Adapter. This driver is installed along with PhoneLink.

This manual applies to PhoneLink versions 10107 and later.

System Requirements

Computer Port: USB for 8004TA or 8005TA; RS-232 for 6001TA, 8001TA, or 8003TA

Operating System: Microsoft Windows 98, 2000, XP, Vista

Microsoft Outlook: version 98 or later

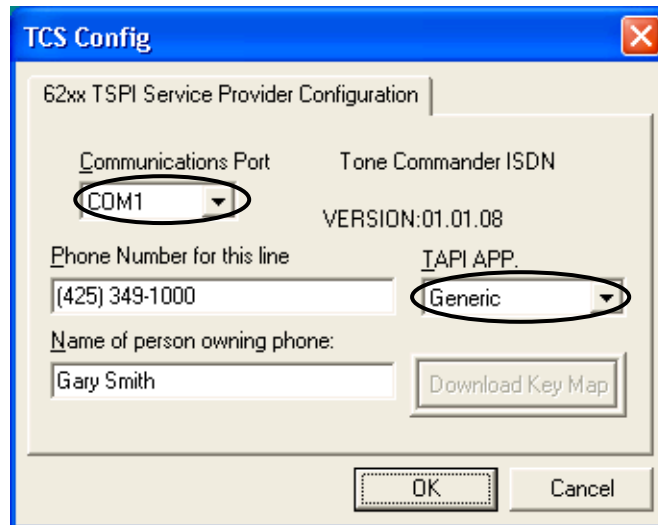
Application and Driver Installation

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

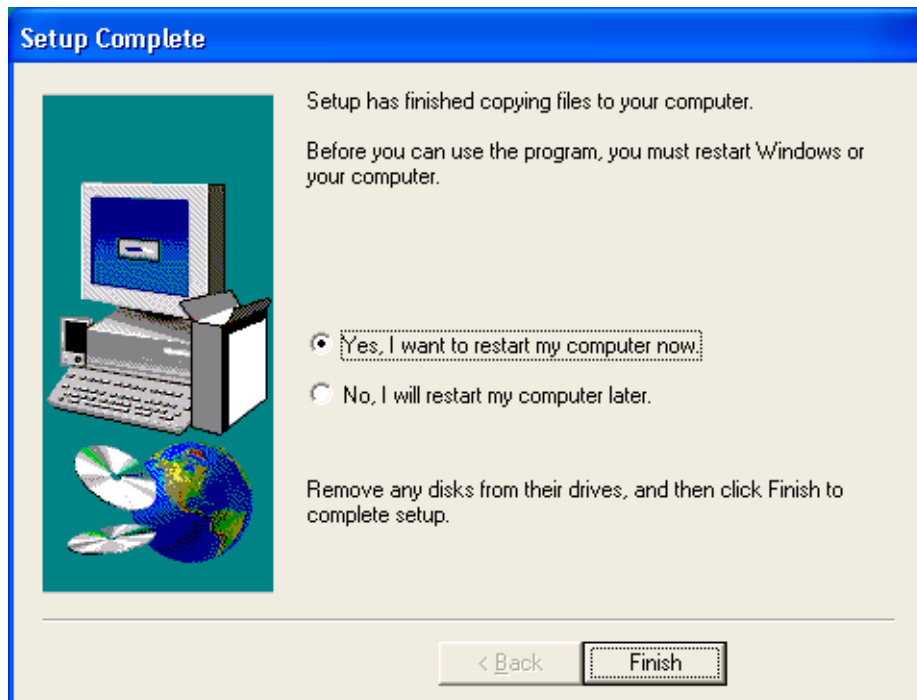
You must be a member of the local Administrators user group to install PhoneLink for Outlook on a computer running Windows 2000, XP, or Vista. Do not use "Run As" to install as a different user than the currently logged-on user.

1. Close any running applications.
2. Double-click the **PhoneLink_Setup_lxxxx.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" window will appear.

- In the **Communications Port** drop-down list, select the com port that will connect to the telephone.
- Enter the phone number for the telephone.
- In the **TAPI APP** drop-down list, select Generic.
- Optionally enter a user name.
- Click the **OK** button.



2. Click The **Finish** button. Your computer will restart.



TSPI Driver Setup

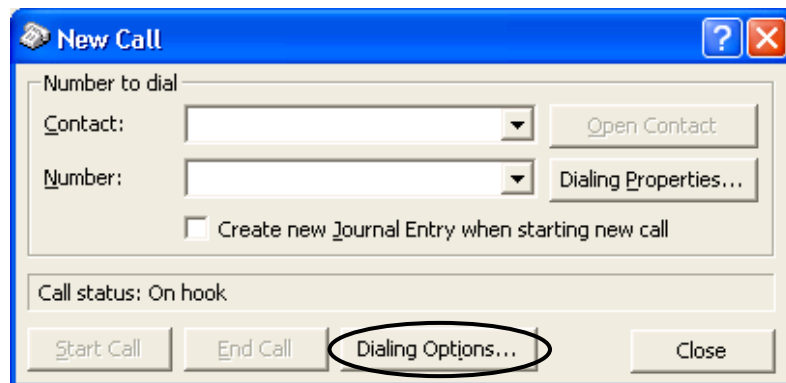
BEFORE PROCEEDING –

- Outlook must be installed on your computer.
- The phone must be operating and connected to the computer serial port.

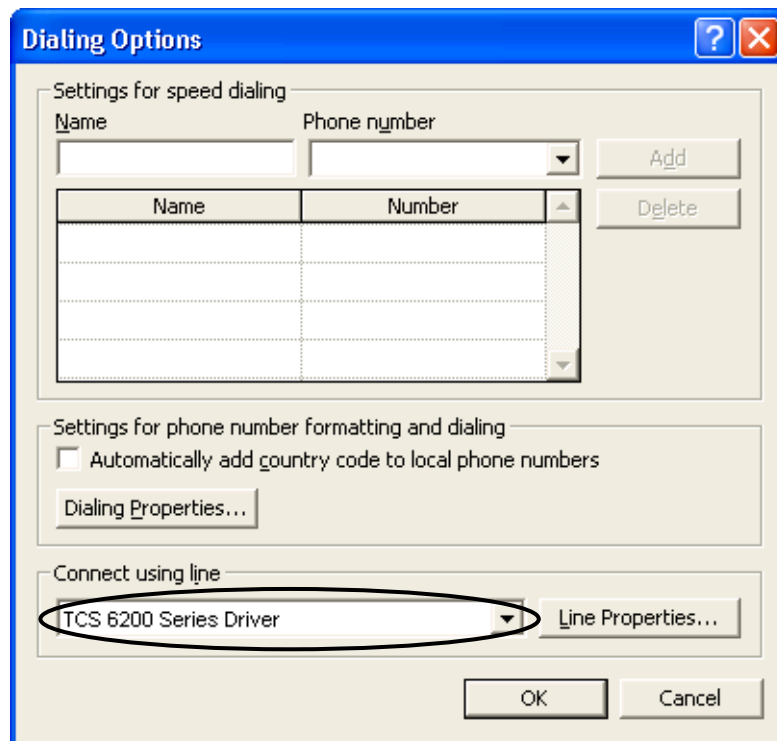
Driver selection for PhoneLink is automatic. The steps in this section set up Outlook to use the Tone Commander driver for call dialing.

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**.



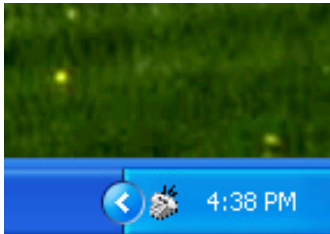
4. Click the **Dialing Options...** button



5. In the **Connect using line** box, select **TCS 6200 Series Driver** for any Tone Commander 6200 or 8000 series phone. 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. Clicking the icon brings up a menu with several options, described on page 6.



A popup window is shown on screen whenever inbound calls are active, ringing, or on hold at call appearances on the ISDN 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 the call bar shows the call appearance (telephone button) number, followed by the called number if available. If an Outlook contact is found with a phone number that matches the called number, and Lookup Called Number is enabled (page 6), the name from the contact is shown in place of the called number.

The second line shows the user 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 name and calling number are not available.

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

See Phone Type Lookup (page 7) to select the contact phone number fields to search when looking up numbers.

The state of a call is indicated by the bar color and the telephone icon. 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)
Active Call	Green		Hold Disconnect Transfer Add Contact or View/Edit Contact
Held Call	Red		Un-hold Add Contact or View/Edit Contact
Ringing Call	Yellow		Answer Add Contact or 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.

Transferring Calls

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

In the Transfer dialog box, enter the number that the call will be transferred to. Click **OK** to initiate the transfer, or click Cancel to return to the call.

Viewing or Editing a Contact

If a 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.

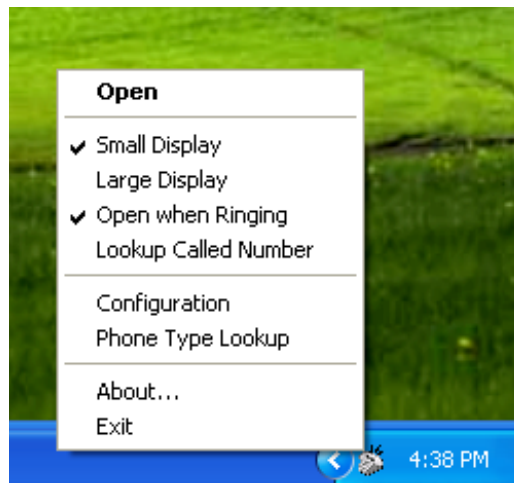
Call Journaling

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

This option enables the lookup of called numbers (numbers assigned to call appearances on your phone). When enabled, and a matching contact is found, the name from the contact is shown in the first line of a call display bar.

Configuration

This item opens the TCS Config dialog (see page 3), where you can change TSPI driver settings and Feature Activator assignments.

Phone Type Lookup

Outlook contacts can have multiple phone number fields. Select this option to change the fields used for looking up numbers.

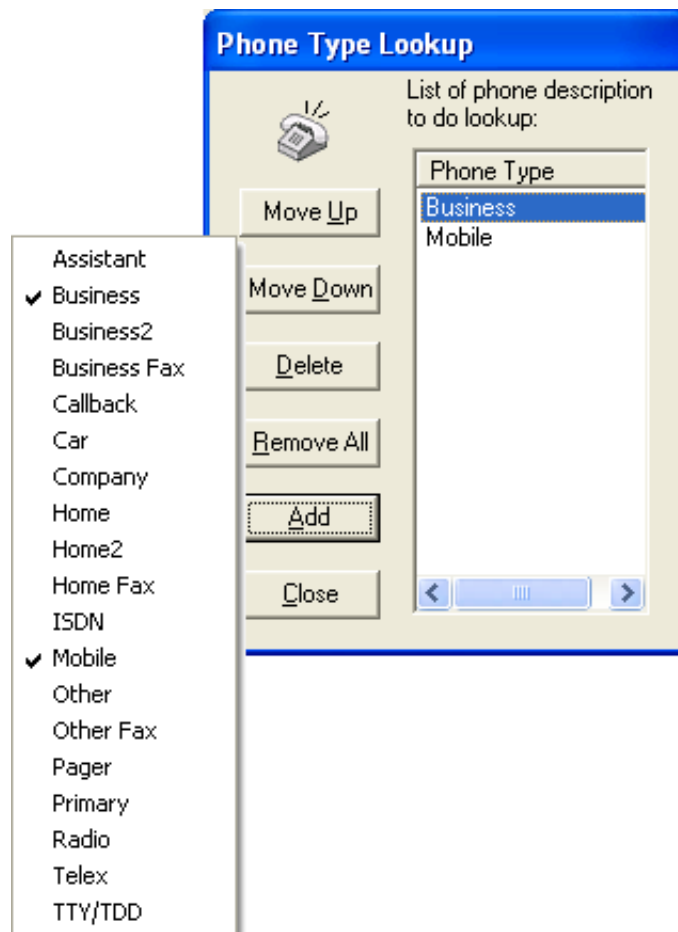
Add pops up a list of fields; click a field name to add it to the Phone Type list.

Delete removes the selected phone type.

Remove All deletes all phone types in the list.

PhoneLink searches the first phone type in the list to find a matching number. If no match is found, the search is repeated using the next phone type. Rearrange the phone types in the list by clicking **Move Up** or **Move Down**.

When finished, click **Close**.



About...

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

Exit

This item closes PhoneLink for the current Outlook session. It will restart the next time you open Outlook (close all Outlook windows first).

To prevent PhoneLink from automatically starting, select **Tools** → **Options** → **Other** tab → **Advanced Options** → **Add-In Manager** in Outlook, then uncheck **PhoneLink** in the Add-In Manager window.

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).</p> <p>Verify that "TAPI Service Provider; 6200 series" is listed. If this driver is listed, highlight it, then select 'Configure'. Verify that the correct communications port is selected. If the driver is not listed, uninstall PhoneLink for Outlook App and Driver, then reinstall.</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>Check the serial port connection between the PC and ISDN phone.</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 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 mode.</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, select 'Dialing Options'.</p> <p>Verify that "TCS 6200 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 select 'OK'.</p>

Support

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

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