



OfficeSuite Dialer Documentation

Information about “OfficeSuite Dialer” for Tenant Administrators

1. OfficeSuite users can download the software from www.broadviewnet.com/OfficeSuiteSupport and install it on their PC. If necessary, software updates will be available from the same location.
2. To use the software, each PC will need its own OfficeSuite Dialer license key.
 - a. License keys become associated with to the PC hardware, so users will need a license key for every PC where the dialer is to be used.
 - b. Obtain additional license keys by contacting OfficeSuite Support.
3. As a tenant administrator you need to know (from OfficeSuite support):
 - a. Your OfficeSuite platform number
 - the same platform number for all users within your tenant
 - b. The Tenant Account for your OfficeSuite account.
 - This is the final part of the web address when logging in to modify your OfficeSuite configuration. It is the number or name after the final ‘/’.
4. To improve the dialer’s performance, it is best if each user enters an area code into their dialer’s configuration. This will be the area code that will be inserted whenever that PC’s software applications present a seven digit number for dialing.

Installing the OfficeSuite Dialer

1. **Prior to installation** you should have from your local OfficeSuite administrator:
 - a. An OfficeSuite extension and PIN
 - b. A Mitel desk phone logged into OfficeSuite using that extension
2. Also from your local OfficeSuite administrator **obtain the following information:**
 - a. A unique OfficeSuite Dialer License Key for your Windows PC.
 - b. Your OfficeSuite platform number.
 - c. Your OfficeSuite Tenant Account name.
 - d. The area code to be added whenever when you click-to-dial a 7-digit number.
3. **Close all applications** that would make use of the OfficeSuite dialer.
 - In particular, close Microsoft Outlook.
4. **Download and run OfficeSuiteSetup.exe** from www.broadviewnet.com/OfficeSuiteSupport.
 - You must have administrative rights to install software on a PC.
5. **Read and understand the software license agreement**
 - If you agree, click “I agree...” and then Next >.
6. On the OfficeSuite Dialer Setup window **enter the following**, then click Next >:
 - a. The Dialer License Key
 - b. The Platform Number

- c. The Tenant Account name
 - d. The Area Code applicable when you attempt to dial a 7-digit number
 - e. The OfficeSuite Extension and PIN
7. Click Next > again. Wait for the installation to complete and click Finish.

Configuring Applications to use OfficeSuite Dialer

1. The OfficeSuite Dialer can be used by any of your PC applications that are TAPI compatible. **Each of those applications will have to be configured individually to use the OfficeSuite Dialer.** Consult each such application's user guide.
2. **For use with Microsoft Outlook:**
 - Open Outlook and view your Outlook Contacts.
 - Highlight any contact.
 - Click the telephone icon representing “Dial”.
 - On the “New Call” window, click Dialing Options.
 - Under “Connect Using line” select “OfficeSuite Dialer” and then click OK.
 - The OfficeSuite Dialer is now ready to use with Microsoft Outlook.

Using the OfficeSuite Dialer

General Information

1. The OfficeSuite Dialer works with all OfficeSuite-powered Mitel phones.¹
2. New calls can be launched without touching the phone, or it can be used after getting dial-tone from a line appearance, the speakerphone button, or the handset.
3. The OfficeSuite Dialer does not work if the phone has active calls or menu activity.
4. The way the OfficeSuite Dialer launches a call depends on the software application. Consult your application's user guide for more detail on its use of 'TAPI' driver. See below for specific instructions for Microsoft Outlook.
5. After “clicking-to-dial”, observe the PC and phone displays for any error messages, otherwise listen for the ring back and answer from the far end.
6. After initiating the call, the OfficeSuite Dialer has no further control over it.
7. Proceed as with any call. Use phone keys to transfer, hold, mute, hang-up, etc.

From Microsoft Outlook

When the OfficeSuite Dialer has been configured for use with Microsoft Outlook (see the section on dialer Installation), you can click-to-dial from your Outlook Contacts:

1. Highlight or double-click to open the contact to be dialed.
 - a. Click the telephone icon called “dial”.
 - This opens the New Call window.
 - If the contact has more than one phone number select the desired Number from the drop-down window.
 - b. OR, click “Actions” and then “Call Contact”.
 - Then select the desired number from the list.

¹ The dialer does not work with analog extensions or USB Phones.

- This opens the New Call window.
2. Click “Start Call” in the New Call window.

Dialing Plans

Phone numbers can be formatted many different ways. The OfficeSuite Dialer has been constructed to accept many different representations of phone numbers. For extension dialing, the dialer will not attempt to adjust the number. For 7 and 10 digit numbers, the Dialer will add the additional digits required by OfficeSuite, e.g. 9-1-. The dialer will ignore phone number punctuation like dashes, spaces and parenthesis. The dialer will recognize “+” as a prefix to an international phone number and replace it with 9-011. In short, most strings used to represent phone numbers will be processed properly by the OfficeSuite dialer.

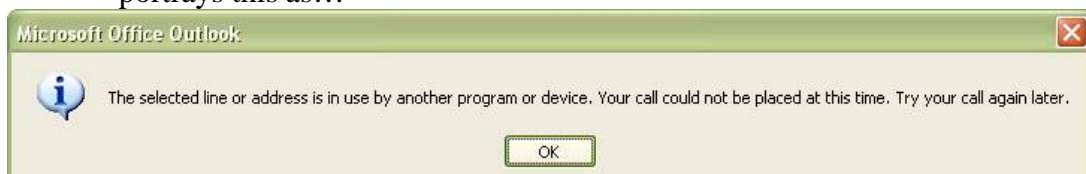
If any dial strings are not handled properly by the Dialer, the error will display on the Mitel phone itself, e.g. “Invalid Extension”. If this occurs, it is likely that a very minor adjustment to the way the phone number is represented by your application will yield a successful call.

Notes

1. The OfficeSuite Dialer does not participate in the call once it starts. For example, in Microsoft Outlook as soon as Start Call is clicked, the button and the New Call window immediately return to their original state.
2. If user extension is logged into their OfficeSuite web page, using the OfficeSuite dialer will end the web login. This issue will be corrected in a future OfficeSuite software release.

Error Messages

1. The error messages delivered when the Dialer fails are modified by the application. OfficeSuite has no control over how application displays these errors. Consult your application user guide for more information.
2. For Microsoft Outlook:
 - a. If the PC has no Internet connectivity to the OfficeSuite server, the Start Call key will remained depressed for a period of time. Eventually it will recover, but no error message will display. Test and confirm Internet connectivity by logging into your OfficeSuite web page.
 - b. If the OfficeSuite Dialer is configured with an invalid license key, Outlook portrays this as...



- c. If the OfficeSuite Dialer is configured with an invalid extension or PIN, Outlook portrays this as:



- d. If the dialer has been configured with an incorrect Platform Number or Tenant Account name, neither Outlook nor the phone will show any response at all after clicking “Start call”.
- e. Telephone numbers that the Dialer could not adapt properly for OfficeSuite will result in error messages delivered to the phone display. Make minor adjustments to the way the target number is stored inside the application.

Modifying the OfficeSuite Dialer Configuration

To modify the configuration, **e.g. to change the PIN** associated with the user extension:

1. Open the Windows Control Panel and double-click Phone and Modem Options
2. Click the Advanced tab.
3. Find and click OfficeSuite Dialer. Then click Configure...
4. Change the settings as appropriate.
5. Click Apply and then OK.

Uninstalling the OfficeSuite Dialer

1. Completely close all applications that were using the OfficeSuite TAPI driver including Microsoft Outlook.
2. Open the Windows Control Panel and double-click Add or Remove Programs
3. Find and click OfficeSuite Dialer. Then click Remove.
4. Click Next >.
5. Click Finish.

Supported Operating Systems

The OfficeSuite Dialer TAPI driver should work with early versions of the Windows operating system, possibly as early as Windows 95. However the software has only been tested on the following operating systems and Broadview Networks will only provide support for this product in the following environments.

- Windows XP
- Windows Vista (32 and 64 bit)
- Windows 7 (32 and 64 bit)
- Windows 2003 (32 bit)