

# Inclarity Integrator (for Windows)

## End User Quick Start v4 16/04/2018

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## 1. Introduction

Many modern organisations have the requirement to integration their telephone activity with other essential business processes and functions.

The Inclarity Integrator client is a software program that can be installed on your desktop in addition to your basic Inclarity service to provide a level of integration. The Integrator client aggregates and accesses your different address books and contact lists to make dialling easier, and to improve your productivity in the following ways:

- Each call you make and receive will show as a box on your screen
- You can manually or automatically pop the contact record associated with a recognised call
- You can review the telephone presence status of your colleagues on your screen
- You can place, answer, hold and transfer calls from buttons on your screen (instead of using your telephone)
- You can click to dial certain telephone numbers when they appear on your screen

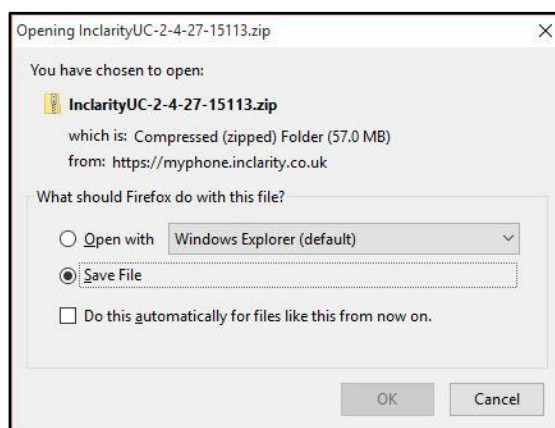
The Integrator client can be supplied in two versions:

- Integrator Lite: Compatible with Microsoft Outlook and Skype for Business (formerly Lync) only
- Integrator DB: The above, and also integration with one or more specialist CRM/database systems

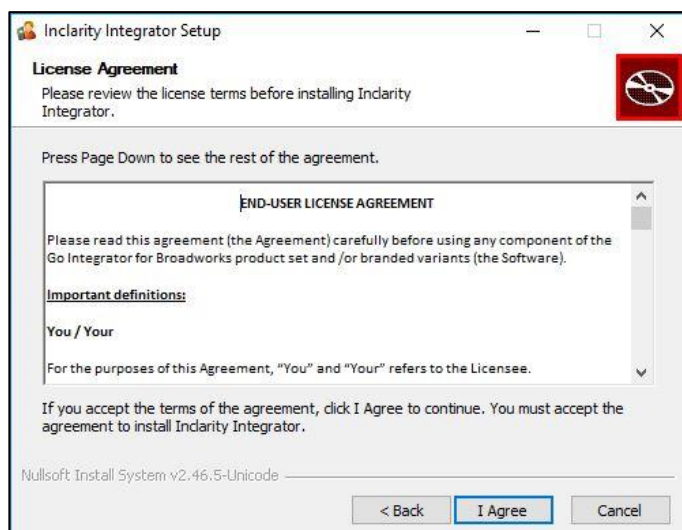
This document includes information on installing and using the software on Windows computers. While there is a version of the Integrator for Macintosh, that version is not discussed in this document.

## 2. Installing the Integrator Client

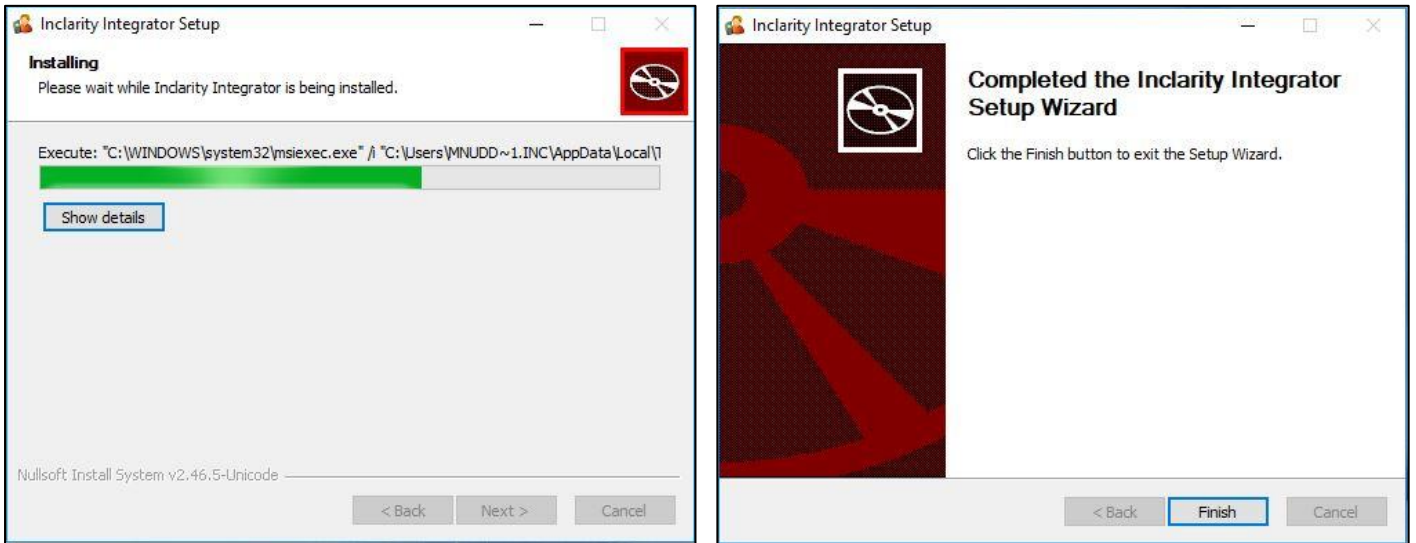
An Inclarity user can download the UC Client software from their online access to the Phone Manager portal. The file download link is shown in the bottom-right hand corner of the screen.



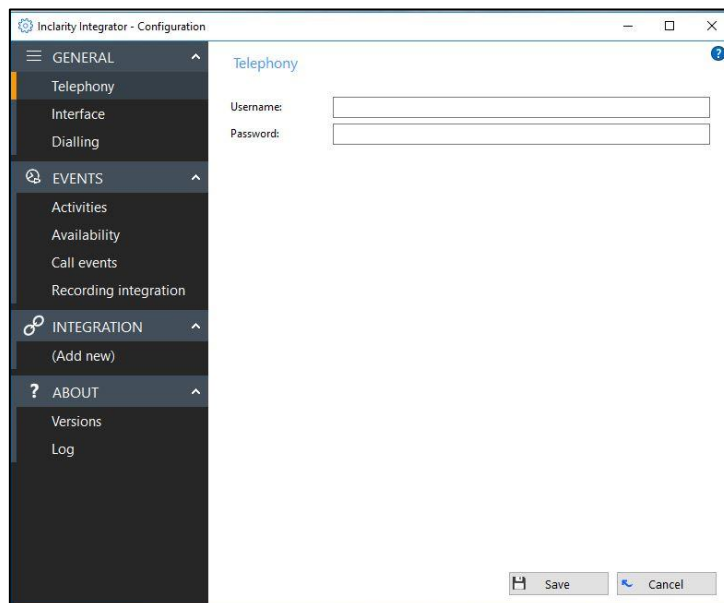
Click to download the .zip file and open it in Windows Explorer to expose the .exe version. Double-click on the .exe file to bring the installation wizard. Click **Next** on the first window and then agree to the software license agreement.



After clicking on **I Agree** the software should begin installing.



When the installation has completed press **Finish** to close the window. You will be immediately prompted to enter your Inclarity Integrator **Username** and **Password**.



Your **Username** will be your Inclarity telephone number. Your **Password** will be the same 4-digit code as your voicemail access.

**IMPORTANT:** To gain the full benefits of the Integrator client you will likely need to perform some additional configuration changes (see below).

After entering the correct details (and after any other changes) press **Save**, and the window should reduce to a small green 'dot' in your Windows System Tray.



If the dot remains grey and/or the software reports any error messages then please re-enter your credentials and check your Internet connection.

### 3. The Integrator Menu

The features of the UC client can be used by right-clicking on the 'dot' in your System Tray (see above) until the following menu appears:

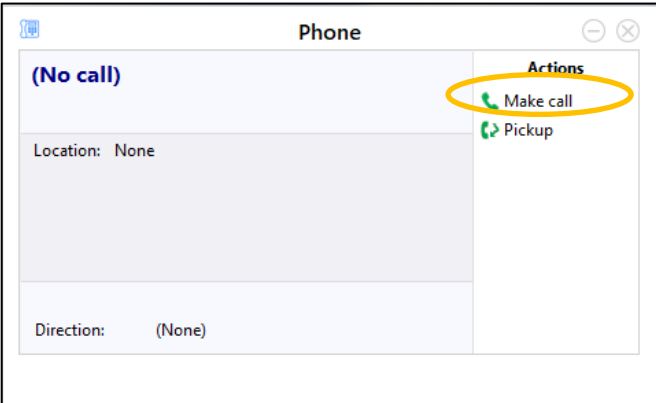


The screenshot shows the 'inclarity integrator' menu with the following options and their descriptions:

- Phone**: Control your telephone handsets
- Presence**: Show availability of colleagues
- Call Settings**: Modify advanced handset operation
- Address Book**: Search the address book for a contact
- Call History**: View recent call history
- Configuration**: Configure user options
- Search**: (Enter text or a number here to search)
- Exit**: Exit the application

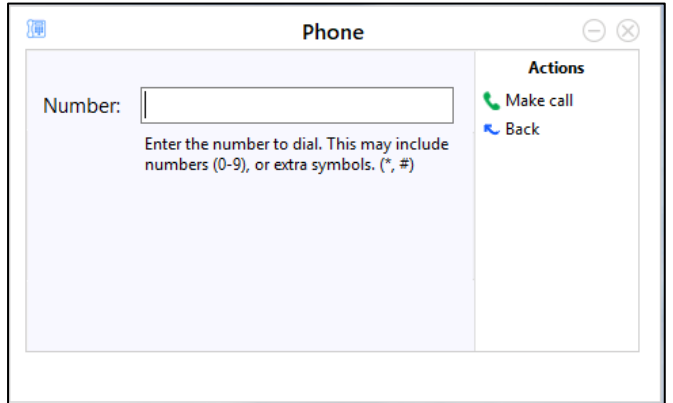
#### 3.1. Phone

When you click on the Phone menu option you are presented with a screen that will allow you to make and pickup calls.



The 'Phone' dialog box shows the following fields and actions:

- (No call)**
- Location:** None
- Direction:** (None)
- Actions:**
  - Make call (circled in yellow)
  - Pickup



The 'Phone' dialog box shows the following fields and actions:

- Number:** [Input field]
- Enter the number to dial. This may include numbers (0-9), or extra symbols. (\*, #)**
- Actions:**
  - Make call
  - Back

Press **Make call**, enter the **Number** and then select **Make call** a second time to actually dial the call.

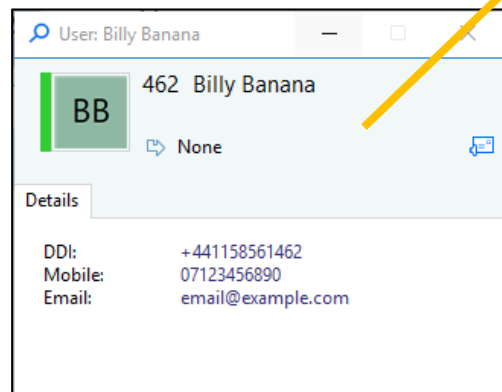
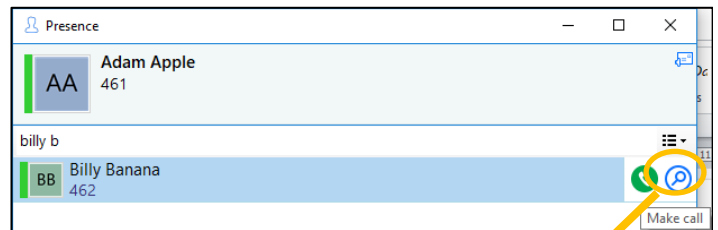
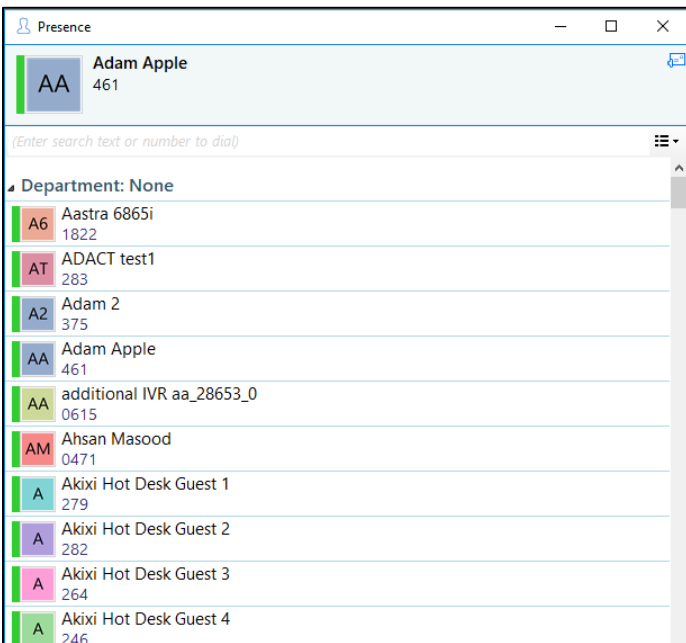
In practice the Inclarity telephone system sets up a call back: first it will ring you on your preferred VoIP telephone, and then after you pick up it will dial out to the far end number you entered.

At each stage you can use this same dialogue box to answer and hang up the calls rather than using the functions on your preferred VoIP telephone.

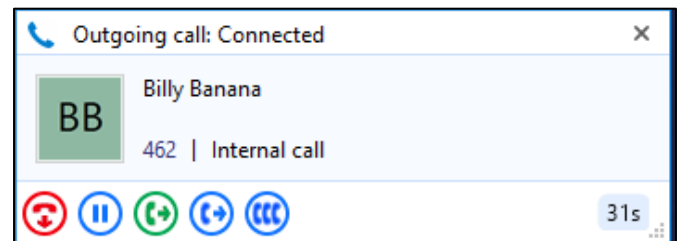
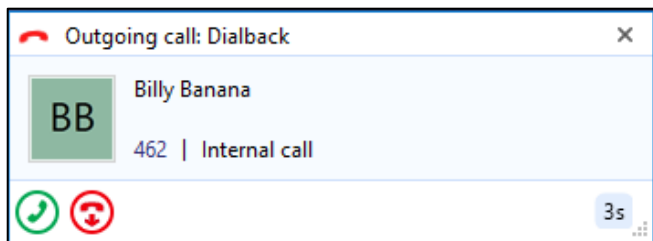


### 3.2. Presence

The Presence window will by default show you the telephone presence status of all the users within your organisation who are using Inclarity telephone Extensions. Where the list is long, you can type into the search bar to find any particular individual. After clicking on a user's name two icons will appear – a phone icon for making a call to that user, and a magnifying glass icon for viewing more detail on that user.

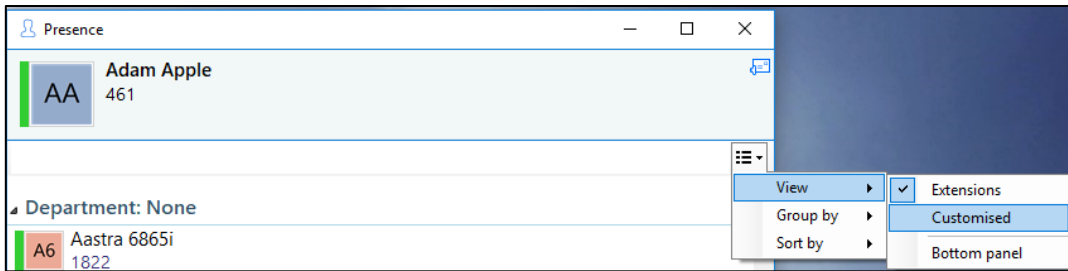


If you click to make a call, then the system will set up a call back call as above – i.e. your phone will ring first, and then the far end.



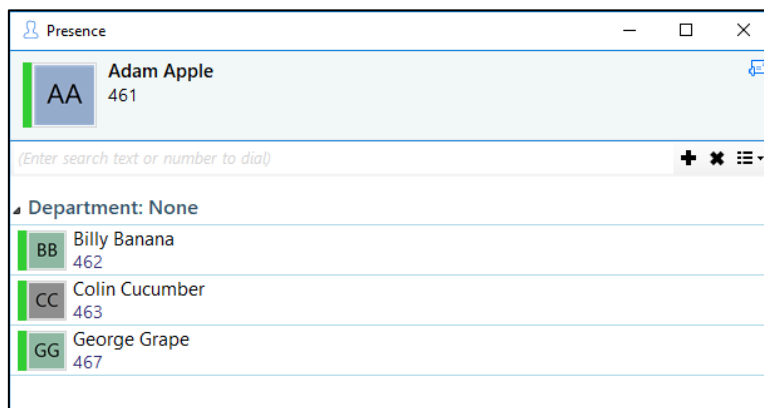
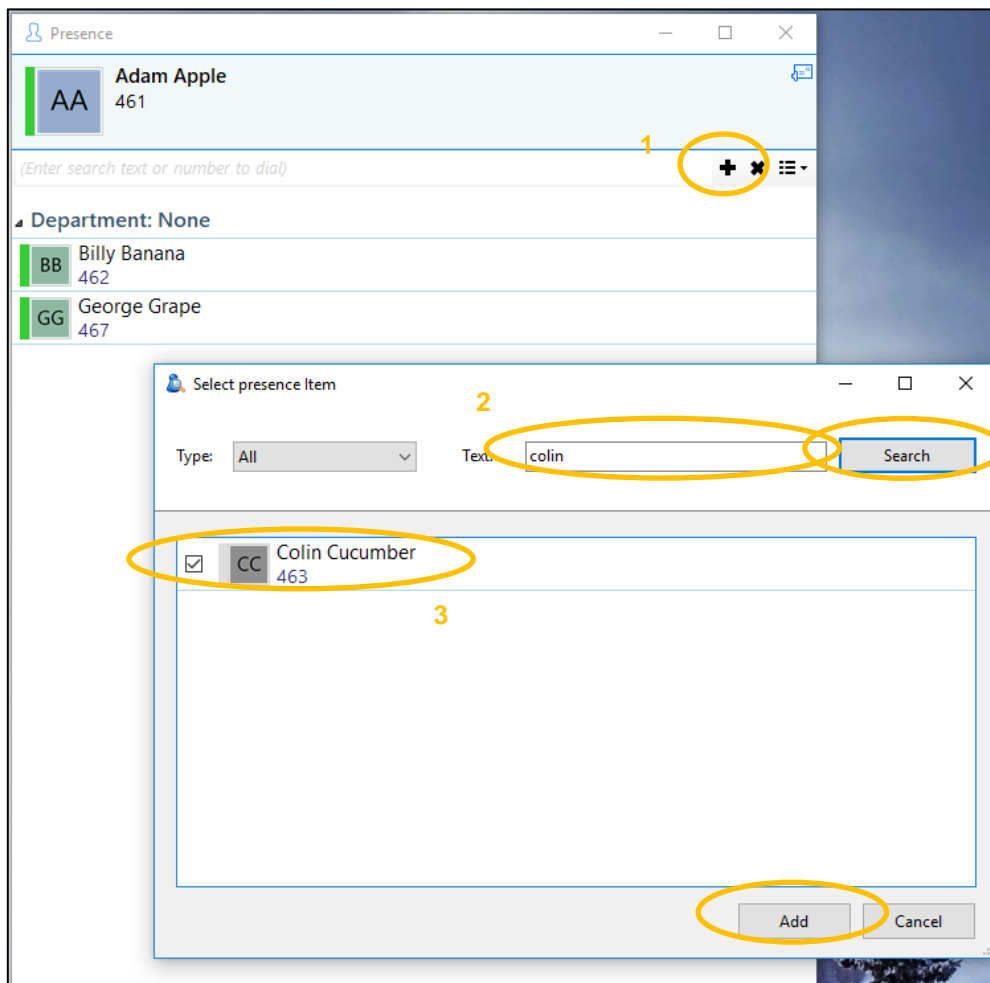
You can use the activity buttons shown on your screen to manipulate the call (instead of using the functions of your VoIP telephone).

If you would rather only watch the presence of certain users by default, you can customise the view of the screen by clicking on the menu icon in the upper-right corner and navigating to select **View -> Customised**.



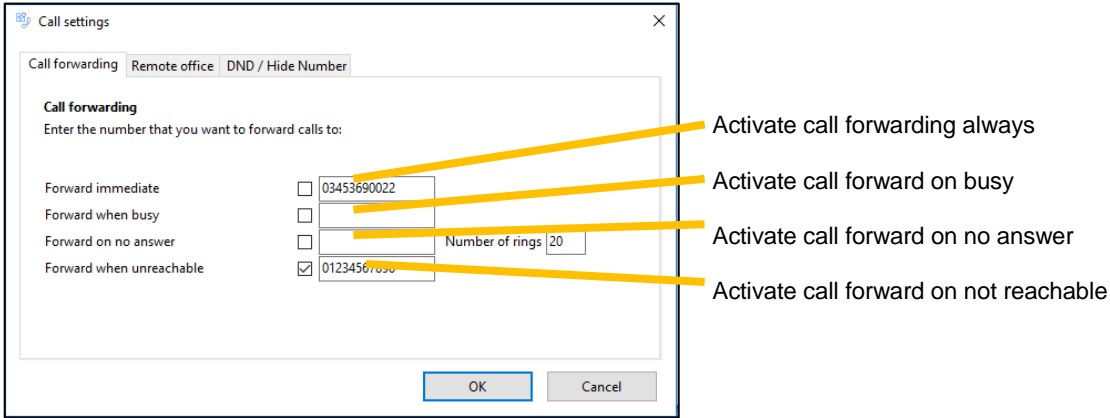
To add a new user to this **Customised** view:

- 1) Select the '+' button
- 2) Enter the name in the **Text** field and press **Search**
- 3) Tick the entry you are interested in and press **Add**



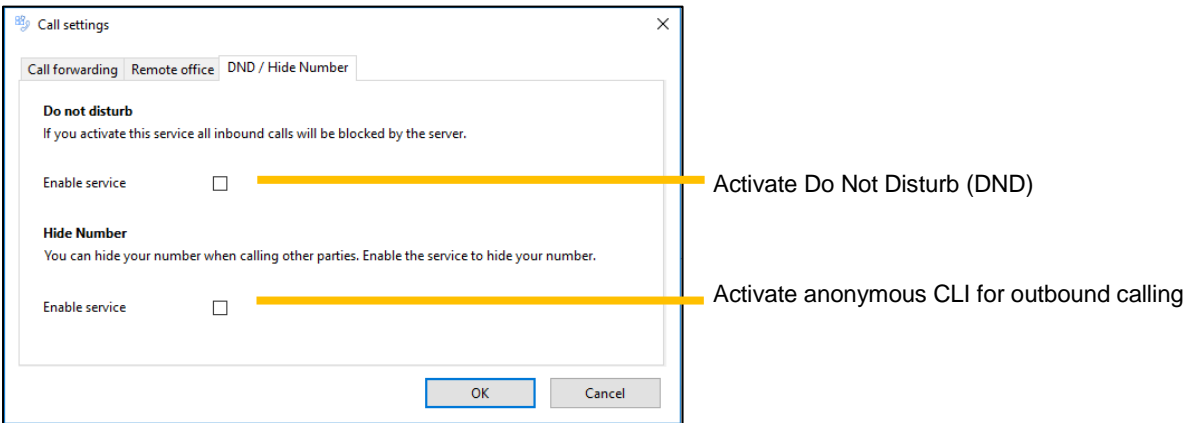
### 3.3. Call Settings

This area allows you to control some of the telephone features associated with your Inclarity Extension.



**IMPORTANT:** All of these forwarding settings are completely separate from those found in the Phone Manager and SMT portals, and are activated at the end user's own risk. The portals will not update to reflect any changes made here, which may lead to confusion and perceived incorrect behaviour.

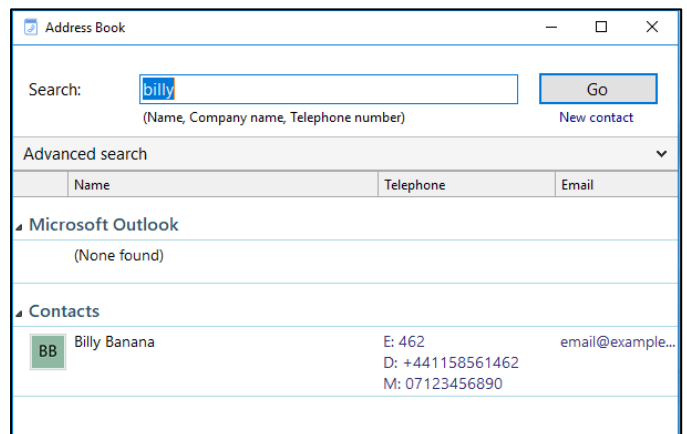
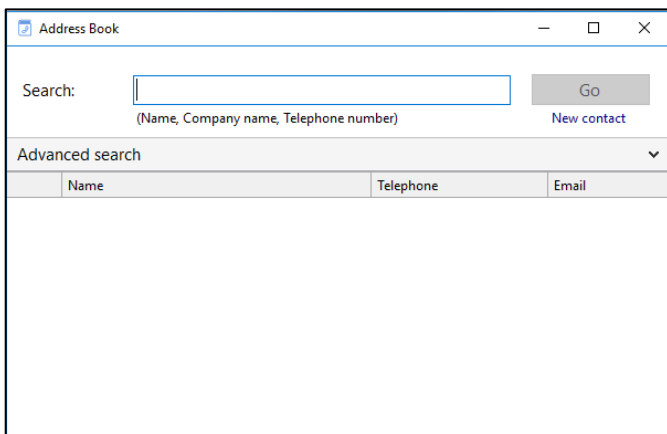
**IMPORTANT:** The **Remote office** feature listed here is not currently supported – any attempted activation of the feature will have no effect.



**IMPORTANT:** The **Hide Number** setting is also not aligned correctly from the Phone Manager and SMT portals, and is activated at the end user's own risk. The portals will not update to reflect changes made here, which may lead to confusion and perceived incorrect behaviour.

### 3.4. Address Book

This area can be used to search your combined telephone address books, including the native Inclarity business directory.

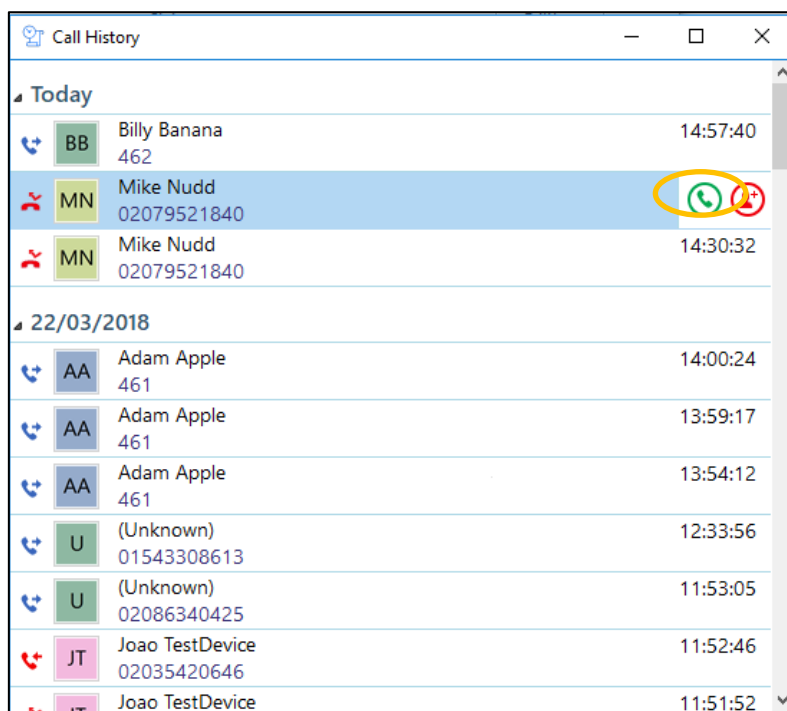


Simply click on the searched entry to trigger a call back call to your VoIP telephone in the normal fashion.

**IMPORTANT:** Any telephone contacts loaded to Phone Manager will not show in the Address Book search of the Integrator client. These two areas of the Inclarity service are currently not compatible (but this will be revised soon).

### 3.5. Call History

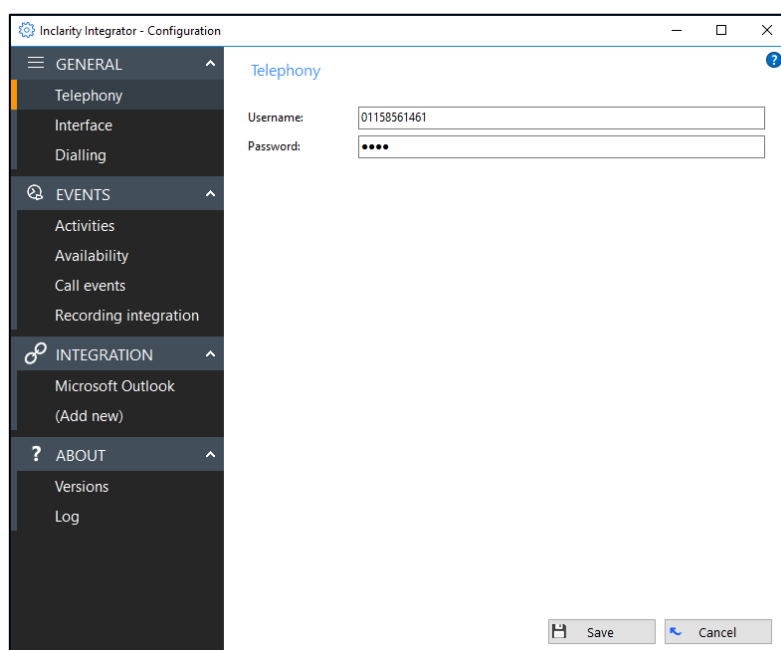
This area displays your most recent calls. Each entry can be clicked on to reveal an activity button for placing a call to that number.



**IMPORTANT:** If you add a Personal contact here from this list, the resulting contact record is only visible to you using the Integrator client. This addition will not appear in Phone Manager or on the screen of your VoIP telephone handset.

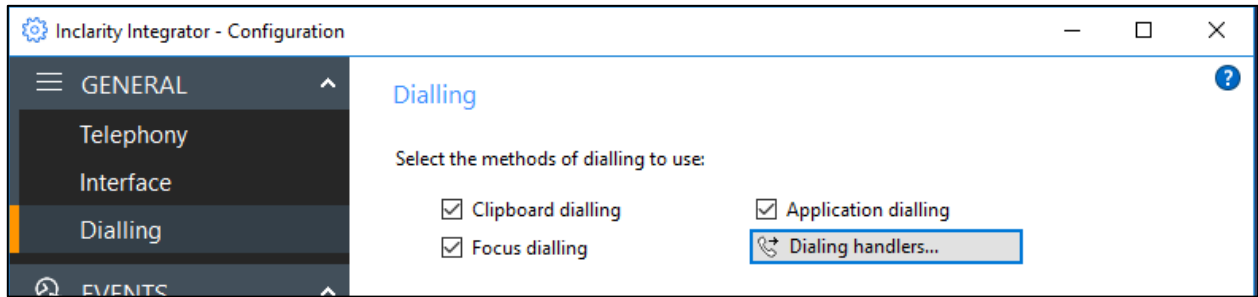
### 3.6. Configuration

This opens on the same screen shown initially when the Integrator client was first installed. You should return here to check your credentials, or to update them if your voicemail password is changed.



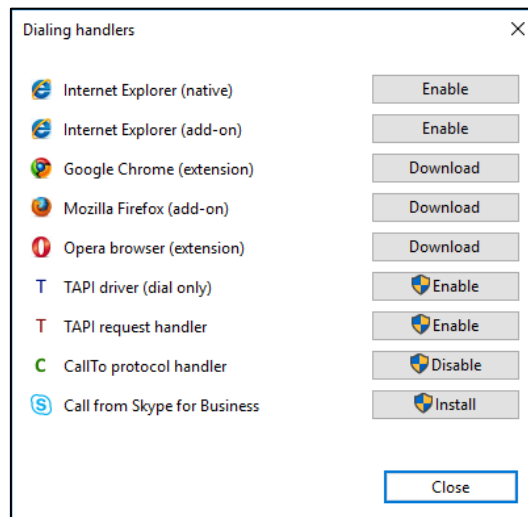


Under the **Dialling** menu option you can enable a number of complementary productivity features.



- Clipboard dialling – allows you to dial any number copied to your Windows Clipboard
- Application dialling – where the integration is possible and configured correctly, enables click-to-dial within the integrated application
- Focus dialling – enabled auto detection of numbers in text boxes within any application window you focus on

To support click-to-dial within your browser, you should click on **Dialing handlers**.

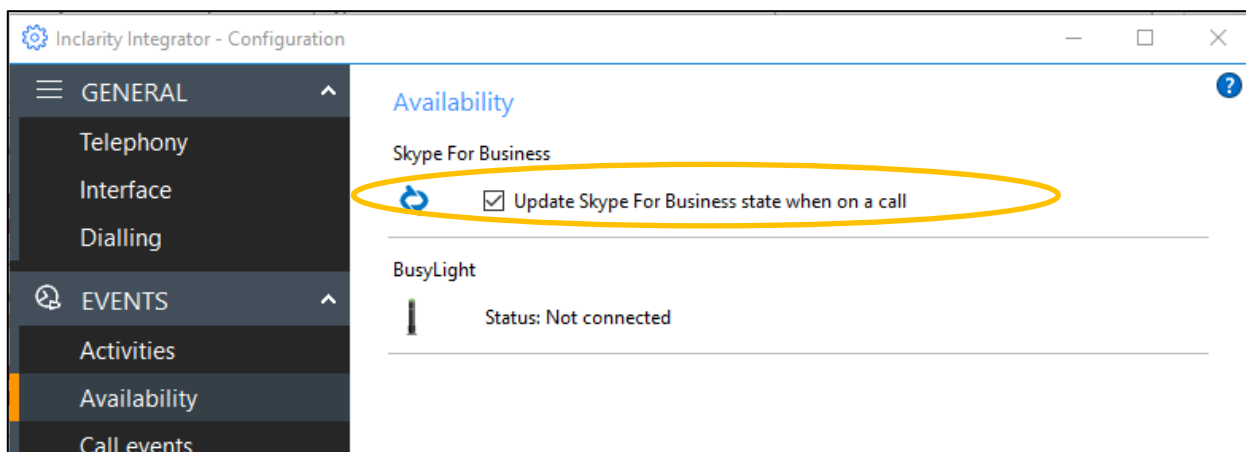


Click on **Enable** or **Download** for your preferred browser to install the relevant add-on or plug-in that will facilitate the click-to-dial activity.

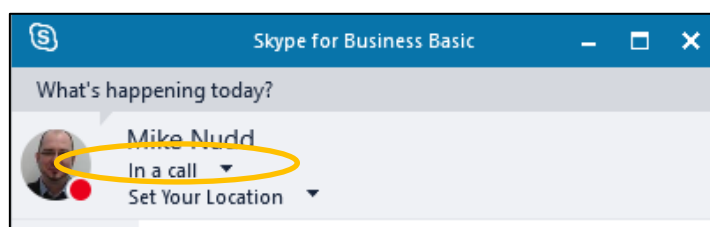
**IMPORTANT:** Browser click to dial will not work correctly if the relevant handler has not been enabled.

## 4. Skype for Business Integration

In the **Configuration** area under the **Availability** menu option you can enable the Integrator client's limited Skype for Business integration.

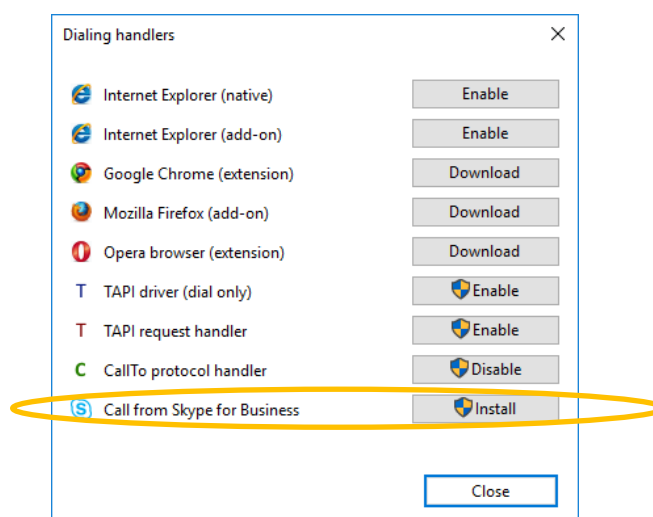


This integration is limited in the sense that when you pick up the phone, Integrator will push a status message to your Skype for Business client so that it reports to all of your Skype contacts that you are busy on the phone.

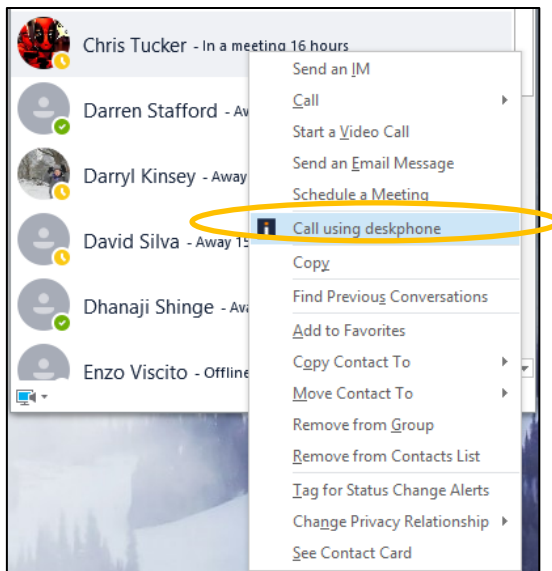


Note however that the Integrator client only cares about Inclarity telephone activity. Any other status changes that occur in Skype due to manual or automated updates will not be reported within the Integrator presence window.

Also note that you can unlock an additional dialling feature under **Configuration -> Dialling -> Dialling Handlers -> Call from Skype for Business**.



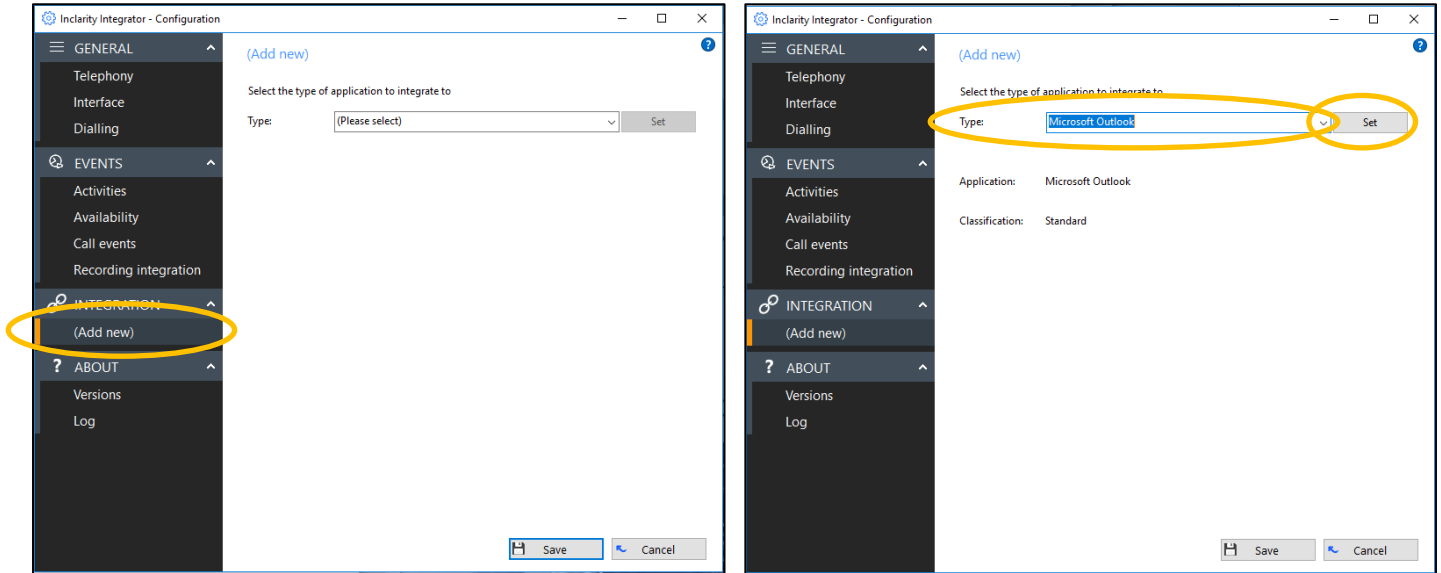
Once installed and enabled, this allows you to dial any Skype contact on their Skype listed telephone number using the Inclarity telephone system. (You may need to restart the Skype for Business client before you see this menu option.)



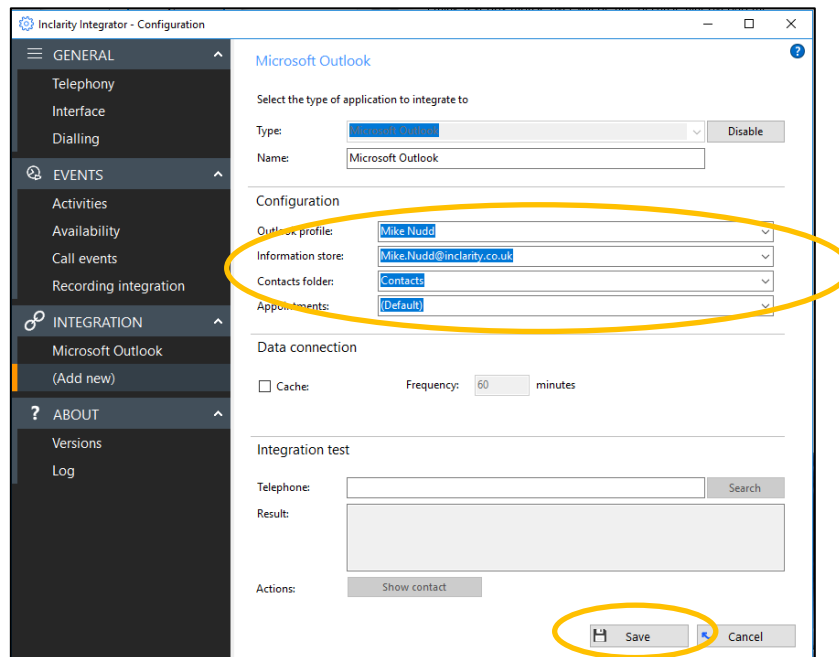
## 5. Outlook Contacts Integration

By default when the Integrator is first installed there are no full application integrations enabled. For Integrator Lite users, the only integration option is for the MS Outlook application, but this must be manually configured by the user before it will start working.

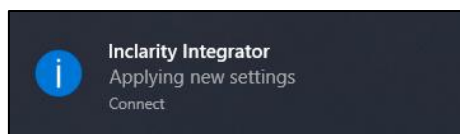
To configure the integration open the **Configuration** window and select the **Integrations -> (Add new)** section of the menu. In the **Type** field drop-down and select Microsoft Outlook, and then press **Set** next to the selection.



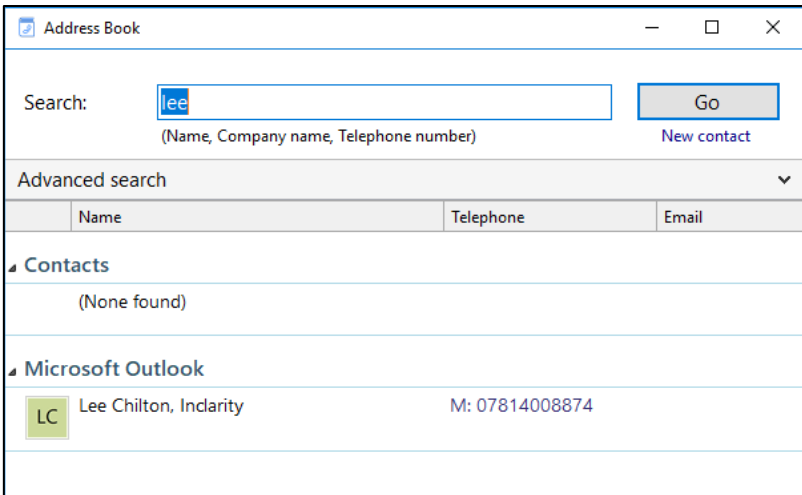
Then select the relevant **Outlook Profile**, **Information Store** and **Contacts folder**, and after this press **Save**.



The window will then close, and will report **Applying new settings**.

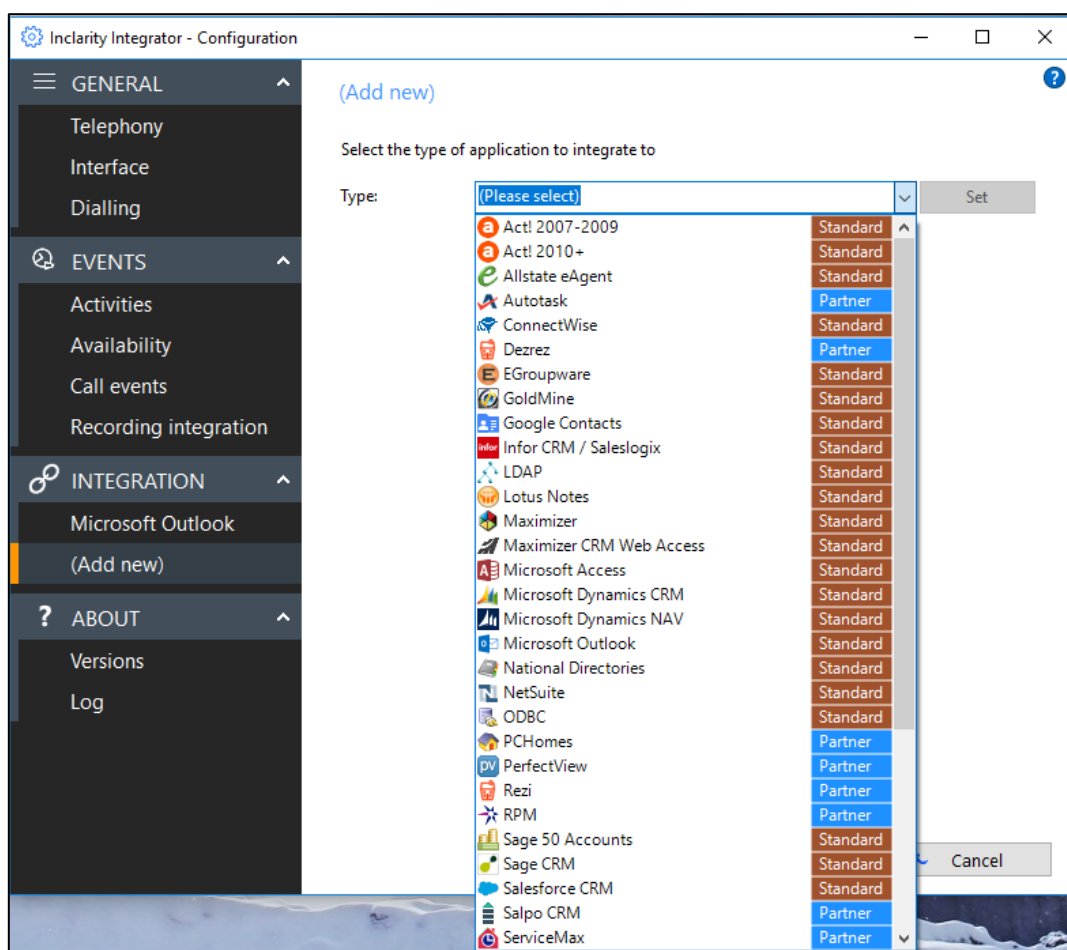


If the integration has been successful then your System Tray presence 'dot' should be green and your Address Book searches should return results from your Outlook Contacts.



## 6. Other Application Integration

If you have licensed the DB version of Integrator then you can enable additional application integrations from the **Configuration** screen under the **Integration** -> **(Add new)** menu option.



Any of the listed applications can be selected, in any combination. In each case, the end user will need to enter the relevant configuration information necessary to access the selected application. It is beyond the scope of this document to discuss these integrations in detail, as each one is different. However, more specific instructions may be available from Inclarity on a case-by-case basis.

If you are interested in integrating with a 3<sup>rd</sup> party software application not shown in this list, then please contact Inclarity for more information.