Chapter 6: Desktop Call Control

Introduction to Desktop Call Control

Compatibility Guidelines:
- 25 Desktop Messaging/Call Control licenses are provided standard. License expansion is available in increments of 10 (205 maximum).

Desktop Call Control is a Windows application that intercepts Automated Attendant calls to your extension, provides a screen pop identifying the caller, and offers call handling options. From the screen pop, you can:
- Do nothing and automatically have the call follow preprogrammed routing.
- Transfer the call to a preset destination.
- Send the caller right to your mailbox.
- Accept the call and have it transfer to your telephone.
- Have the call wait on Hold.
- View the contact details for the caller.

In addition, Desktop Call Control provides:
- Find Me Transfer with Match
  Find Me Transfer forwards your calls to up to three destinations. It tries your programmed destinations, in order, and sends the call to your mailbox if you don’t answer. Find Me Match enhances Find Me Transfer by transferring only those calls from a specific outside caller.

- Call Log with Make Call to Logged Number
  The Call Log is a record of all the outside calls to your extension while Call Control is active. In addition to showing important information about each call, you can use the Call Log to automatically place a call to a logged number.

- Make Call to Contact
  Make Call to Contact allows you to automatically place a call to any contact in your Outlook Contacts or Address Book (6000 contacts maximum).

- Greeting Control
  You can use Call Control to determine which greeting is used when Call Control is active or inactive. This overrides the setting you make in your mailbox.
Ask Caller’s Number
Ask Caller’s Number requests an incoming caller to enter their telephone number before being put through to your extension. If caller ID for the call is not received, Ask Caller’s Number identifies the caller and provides for automated return calls.

Desktop Call Control PC Requirements
Following are the PC Requirements for Desktop Call Control.
- Operating System
  - Use one of the following or higher:
    - Windows NT 4.0
    - Windows 2000
    - Windows XP
- Processor
  - Pentium 400 MHZ or higher, mouse required
- Memory (RAM)
  - 256 MBytes (minimum)
- Video
  - VGA (16-bit or 24-bit SVGA recommended)
- Network Adapter
  - Required for LAN connection (10-baseT minimum)
- Browser
  - Internet Explorer 5.00 or higher with JavaScript and cookies enabled

About this Chapter
This chapter provides detailed information on the Desktop Call Control setup and features. The information is presented in the following headings:
- Installing the Call Control Client
  - Learn how to install the Call Control client software that must run on your PC.
- Setting Up Call Control
  - Enter the options for the Call Control Setup Screen.
- Using the Call Log
  - Review the features of the Call Log.
- Make Call to Contact
  - Find out how to automatically place calls to any contact in your Contacts or Address Book.
- Exit
  - Shut down Call Control so it will stop intercepting your calls.
- Call Control Screen Pop
  - Learn all the features available in the Call Control screen pop.
Installing the Call Control Client

Using the Installation Program

Before proceeding, be sure Mailbox Options: Subscriber: [Subscriber] Desktop Call Control on page 537 is enabled for your mailbox.

If this option is not available, the maximum number of licenses has been exceeded (205 maximum).

To install the Call Control Client:

1. Exit (close) all active programs.

2. Check your Windows operating system. Call Control requires Windows NT/2000/XP or higher.

3. On the System Document CD that came with your system, locate the Call Control Client folder.

4. Double-click Setup.exe. You see:

   ![Setup Program Window]

5. Make sure all active programs are closed and click Next>. You see:

   ![Destination Location Window]

6. Click Next> to install the Call Control client in the standard location.

   OR

   Click Browse... to install the client in an alternate location.
Installing the Call Control Client

7. When you see:

![Select Program Folder](image)

Click **Next >**, You see:

![Start Copying Files](image)

8. Click **Next >**, You see:

![Setup Complete](image)

9. Click **Finish** to complete the installation.
   OR
   Check *Yes, I want to launch Call Control now* + **Finish** to complete the installation and automatically launch Call Control.
   ■ In either case, go to Setting Up Call Control on the next page.
Starting Call Control For the First Time

To start up Call Control for the first time:

1. Click Start + Program + Call Control + Call Control. You see:

   ![Call Control Setup Screen]

   - You also see this screen if you selected Yes, I want to launch Call Control now during installation.

2. Click OK. You see:

   ![Call Control Setup Screen]

3. Click Yes. You see the Call Control Client Setup Screen:

   ![Call Control Setup Screen]

4. Enter the Setup Screen options as required.

   - Turn the page for more on each Setup Screen option.

5. Click Save. This will store your options, activate Call Control, and enable the Call Control icon in the system tray.

6. Right-click this icon to:

   - Access the setup screen.
   - Review your call log.
   - Use Make Call to Contact to place a call.
   - Exit Call Control.
Setting Up Call Control

Opening the Setup Screen

To open the Setup Screen:
1. Locate and right-click the Call Control icon in the system tray. You see:

   ![Call Control icon]

   Call Control icon.

2. Click Setup. You see the Setup Screen:

   ![Setup Screen]

Voice Mail Mailbox Options

- You **must** have Call Control enabled (Yes) in Mailbox Options: Subscriber: [Subscriber] Desktop Call Control on page 537.
- *If this option is not available, the maximum number of licenses has been exceeded.*
- When you are done making your entries in the setup screen, click **Save**.

Mailbox Number

Use this option to enter your mailbox number.

**Options**

- **Digits** (7 max.).

**Default**

- ✔️ No entry.
Setting Up Call Control

Security Code

Use this option to enter mailbox Security Code.

Options
- Digits (6 max.).

Default
✓ No entry.

TCP/IP Options

VM Server Service Number

Use this option to enter the voice mail TCPIP Service Number (port number). Enter 2000 for this option.

Options
- Always enter 2000.

Default
✓ No entry.

VM Server IP Address

Use this option to enter the voice mail IP address. This is the same address you enter when logging onto the Admin program. Your System Administrator can provide you with this address. To hear this address from the System Administrator’s telephone:

1. Log onto the System Administrator’s mailbox.
2. Dial SA.
3. Dial TCPIP.
   - The voice prompts will announce the IP address.

Options
- Digits (12 max.).

Default
✓ No entry.

Call Options

Default Action

Use this option to set how Call Control handles incoming calls to your extension. When an Automated Attendant caller dials your extension, the Call Control screen pops and the Timeout timer starts. If you take no action for the Timeout interval, Call Control handles the call according to the settings of this option.

Options
- Transfer Call
  - Call Control transfers the call to the number entered in the active Transfer option below.
- Record Message
  - Call Control sends the call to your mailbox so the caller can leave a message.
- Accept Call
  - Call Control sends the call to your extension, using the TRF or UTRF action specified by the Automated Attendant.
- No Action
  - Call Control allows the Automated Attendant to handle the call.

Default
✓ Accept Call.
Setting Up Call Control

Timeout

Use this option to set how long the Call Control screen pop remains active. If you take no action for this interval, Call Control handles the call according to the settings of the Default Action option above.

Options
- Seconds (2-90).

Default
✔️ 20

Audible Alarm

If your PC has a sound card, use this option to enable or disable ringing in your PC speakers for incoming calls (i.e., while the Call Control screen pop is active).

Options
- Enabled (checked).
- Disabled (unchecked).

Default
✔️ Enabled (checked).

DID Mode

Use this option to switch Call Control from the Automated Attendant to the Call Forwarding Mode.

- Automated Attendant Mode
  This is the standard Call Control mode. Call Control intercepts calls from the Automated Attendant intended for your extension.

- Call Forwarding Mode
  In this mode, Call Control intercepts calls as they are forwarded to your mailbox. The Call Control screen pop occurs when Call Forwarding intercepts your call and starts to send it to your mailbox.

Options
- Enabled (checked).
- Disabled (unchecked).

Default
✔️ Disabled (unchecked).

Ask for C.I.D.

Use this option to enable or disable the Ask Caller’s Number feature for calls to your extension. If enabled, your caller must enter their telephone number in order for voice mail to put the call through. Call Control uses this number to identify your caller and provide for automated return calls. If voice mail receives Caller ID for the call, enabling this option has no effect and the caller will not be asked to enter their number.

If disabled, callers will not be requested to enter their telephone number.

Options
- Enabled (checked).
- Disabled (unchecked).

Default
✔️ Disabled (unchecked).

Transfer 1 String

When Default Action is set for Transfer Call, use this option to enter the first transfer string. The entry can contain any alphanumeric entry. The alpha entries are used as the text description for the call in the Call Control screen pop. The numeric entries are the number dialed. For example, in the entry Mary 310 Call Control uses Mary as the text name and 310 as the destination. The transfer destination can be:

- An internal extension.
- A local number.
- A long distance number.
Call Control uses the standard dialing rules to differentiate internal extension, local, and long distance calls.

- Internal extensions are less than 5 digits.
- Local calls are 5-8 digits.
- Long distance calls are more than 8 digits.

When entering local and long distance numbers, enter the outside number **without** a trunk access code. Call Control uses the trunk access codes set in the following options:

- Customize: Tenant Options: [Access Digits] Access Digits Before Long Distance Callout on page 582.

**Options**

- **Alphanumeric.**
- Click the Radio button to the left of the field to enable the entry.

**Default**

✔ No entry.
✔ Transfer 1 String is enabled.

**Transfer 2 String**

When *Default Action* is set for **Transfer Call**, use this option to enter the second transfer string. See **Transfer 1 String** above for more.

**Options**

- **Alphanumeric.**
- Click the Radio button to the left of the field to enable the entry.

**Default**

✔ No entry.
✔ Transfer 2 String is disabled.

**Transfer 3 String**

When *Default Action* is set for **Transfer Call**, use this option to enter the third transfer string. See **Transfer 1 String** above for more.

**Options**

- **Alphanumeric.**
- Click the Radio button to the left of the field to enable the entry.

**Default**

✔ No entry.
✔ Transfer 3 String is disabled.

**Hold 1 Message**

Not used.

**Hold 2 Message**

No used.
Setting Up Call Control

Greeting to use While Active
Use this option to specify which of your greetings is active (1-3) while Call Control is active. Initially, the setting of this option overrides the greeting you have selected as active from your mailbox. After setting this option in Call Control, you can activate a different greeting from your mailbox and it will override the Call Control setting. To reinstate the Call Control settings, open the setup screen and click **Save**.

*Options*
- Greeting 1.
- Greeting 2.
- Greeting 3.

*Default*
✔ Greeting 1.

Greeting to use When Inactive
Use this option to specify which of your greetings is active (1-3) while Call Control is inactive (i.e., after you exit). Initially, the setting of this option overrides the greeting you have selected as active from your mailbox. After setting this option in Call Control, you can activate a different greeting from your mailbox and it will override the Call Control setting. To reinstate the Call Control settings, open the setup screen and click **Save**.

*Options*
- Greeting 1.
- Greeting 2.
- Greeting 3.

*Default*
✔ Greeting 1.

Find Me Transfer

**Enabled**
Use this option to enable or disable Find Me Transfer. If enabled, Find Me Transfer forwards your outside calls to the destinations entered in the *Transfer String* options below. If you answer at the destination and say “Hello,” Call Control announces the call and allows you to dial 1 to accept the call or hang up.
- If you dial 1 to accept the call, the call goes through and the calling party’s Caller ID (if any) shows on the telephone display.
- If you hang up, the call goes directly to your mailbox.

If you have a single destination entered in *Transfer String*, Call Control will try that extension and send it to your mailbox if unanswered. If you have multiple *Transfer String* entries, Call Control will try them in sequence (from 1 to 3). If your call is still unanswered at the last destination, it goes to your mailbox.

*Options*
- Enabled (checked).
- Disabled (unchecked).

*Default*
✔ Disabled (unchecked).
Enable Find Me Match

This option allows you to activate Find Me Transfer forwarding only for a specific outside caller. If you receive a call from that party and the received Caller ID name or number matches the Match entry, Call Control forwards the call. If there is no match, the call is handled normally without forwarding. If you want to enable Find Me Match, Find Me Transfer above must also be enabled.

Find Me Match will not route on a caller-entered number (i.e., when Ask for C.I.D. is enabled).

Options
- Enabled (checked).
- Disabled (unchecked).

Default
✔ Disabled (unchecked).

Match

Use this option to enter the Caller ID name or number that will activate Find Me Match.
- When entering a Caller ID number, enter just the digits without any separators (such as a dash or space) or other characters. You can, however, enter descriptive text before or after the number.
- When entering a Caller ID name, it must be listed in your Contacts or Address book. Be sure to enter the name exactly as it appears in the Caller field of the Call Control screen pop.

Options
- Alphanumeric.

Default
✔ No entry.

Transfer 1 String

Use this option to enter the first Find Me Transfer destination. The entry can contain any alphanumeric entry. The alpha entries are used as the text description for the call to help you identify your entry. The numeric entries are the number dialed. For example, in the entry Mary 310 Call Control uses Mary as the text name and 310 as the destination. The transfer destination can be:
- An internal extension.
- A local number.
- A long distance number.

Call Control uses the standard dialing rules to differentiate internal extension, local, and long distance calls.
- Internal extensions are less than 5 digits.
- Local calls are 5-8 digits.
- Long distance calls are more than 8 digits.

When entering local and long distance numbers, enter the outside number without a trunk access code. Call Control uses the trunk access codes set in the following options:
- Customize: Tenant Options: [Access Digits] Access Digits Before Long Distance Callout on page 582.

Options
- Alphanumeric.

Default
✔ No entry.
Setting Up Call Control

Transfer 2 String

Use this option to enter the second Find Me Transfer destination. See Transfer 1 String above for more.

Options
- Alphanumeric.

Default
✔ No entry.

Transfer 3 String

Use this option to enter the third Find Me Transfer destination. See Transfer 1 String above for more.

Options
- Alphanumeric.

Default
✔ No entry.

Email Address Book

Profile Name

If you are using Microsoft Outlook as your email client, use this option to enter your email profile name. This allows Call Control to use the caller’s number (if received) to do a lookup in your Contacts and/or Address Book for the caller’s record. If Call Control finds the record, it will display the caller’s name in the screen pop Caller field. Call Control synchronizes with your Microsoft Outlook Contacts each time the Call Control application starts.

To find your profile name:
- Click Start + Control Panel + Mail + Show Profiles. Your profile name (or names) display. (The default Microsoft Outlook profile name is shown below.)

Options
- Alphanumeric characters.

Default
✔ No entry.
Password

If you made an entry for Profile Name above, use this option to enter the password for your email account. This is the password you use to log into your email account.

Options
- Alphanumeric characters.

Default
✔ No entry.

Search Contacts

If you have set up the Profile Name and Password options above, use this option to enable or disable the ability of Call Control to do a lookup in your Contacts for the caller’s record.

Options
- Enabled (checked).
- Disabled (unchecked).

Default
✔ Enabled (checked).

Search Address Book

If you have set up the Profile Name and Password options above, use this option to enable or disable the ability of Call Control to do a lookup in your Address Book for the caller’s record.

Options
- Enabled (checked).
- Disabled (unchecked).

Default
✔ Enabled (checked).

Search Public Contacts

If you have set up the Profile Name and Password options above, use this option to enable or disable the ability of Call Control to do a lookup in your public (global) Contacts or Address Book for the caller’s record. If your public contacts list is excessively large, you may have to disable this option.

Options
- Enabled (checked).
- Disabled (unchecked).

Default
✔ Disabled (unchecked).
Using the Call Log

Description

The Call Log is a record of all the outside calls to your extension while Call Control is active. It sequentially shows the date and time you received a call, the name and phone number of the caller, and the call result (i.e., how the call was handled in the system). See Call Log Fields and Call Log Options below for more.

Opening the Call Log

To open the Call Log:

1. Locate and right-click the Call Control icon in the system tray. You see:

   ![Call Control icon]

   Call Control icon.

2. Click Call Log. You see:

   ![Call Log window]

   Call Log Fields

   Call #

   This field is the sequential call record number. The oldest calls are at the bottom of the list; the newest at the top of the list.

   Time

   This field shows the date and time the system received the call.

   Name

   This field shows your caller’s name. The name will display only if:
   - The telephone system received the Caller ID number for the call.
   - The number and name are entered in your Contacts and/or Address Book (depending on your Call Control setup). Call Control does not use the Caller ID name. It uses the name retrieved from your Contacts or Address Book that corresponds to the caller’s number.

   ![Call Log window]

   Call Log Fields

   Call #

   This field is the sequential call record number. The oldest calls are at the bottom of the list; the newest at the top of the list.

   Time

   This field shows the date and time the system received the call.

   Name

   This field shows your caller’s name. The name will display only if:
   - The telephone system received the Caller ID number for the call.
   - The number and name are entered in your Contacts and/or Address Book (depending on your Call Control setup). Call Control does not use the Caller ID name. It uses the name retrieved from your Contacts or Address Book that corresponds to the caller’s number.
If you see *Unknown* in this field, one of the following happened:
- The telephone system did not receive the Caller ID number for the call.
- Caller ID was received, but the number did not correspond to a record in your Contacts or Address Book.

**Phone Number**

The *Phone Number* field shows the caller’s number. The number will display *only if* the telephone system received the Caller ID number for the call.

**Result**

The *Result* field describes how the telephone system handled the call as follows:
- **Accepted**
  - The call was transferred to you and you answered the call.
- **Hung Up**
  - The outside caller hung up while your Call Control screen pop was active.
- **Record Message**
  - The outside caller left a message in your mailbox.
- **Accepted (timeout)**
  - Your outside caller was routed to your extension, but hung up without leaving a message.

**Call Log Options**

**Delete Selected Calls**

Use this option to delete the highlighted record.

**Clear Log**

Use this option to delete the entire Call Log.

**Create Contact**

If the telephone system received the Caller ID number for the call, and the *Name* field shows *Unknown*, select **Create Contact** to automatically open a new Outlook Contact record for caller. This allows you to enter the caller’s name and other important information. The next time you receive a call from this party, the name you entered in their Contact record will automatically display in the Call Log *Name* field.

*If you create or modify an Outlook Contact, you must exit and restart Call Control before it will recognize the new record.*

**Make Call to Logged Number**

The *Make Call to Logged Number* option lets you automatically dial any call in the Call Log for which the telephone system received Caller ID.

**Using Make Call to Logged Number**

To place a call to a number in the Call Log:
1. Highlight the record for the call you want to return and select **Make Call**.
   - You see *Calling your extension...* in the lower left of the Call Control Screen.
2. When Call Control calls your extension, answer and say “Hello.”
3. Call Control answers “*Ready*” and automatically dials your caller.
   - The lower left of the Call Control Screen provides the status of your call.
Using the Call Log

The Make Call option uses the standard dialing rules to differentiate local and long distance calls.

- Local calls are 5-8 digits.
- Long distance calls are more than 8 digits.

Make Call uses the trunk access codes set in the following options:

- Customize: Tenant Options: [Access Digits] Access Digits Before Long Distance Callout on page 582.

Exit

Select this option to exit the Call Log. This option does not exit Call Control.
Make Call to Contact

Description

Make Call to Contact allows you to automatically place a call to any contact in your Outlook Contacts or Address Book (depending on your Call Control setup).

Opening Make Call to Contact

To open Make Call:
1. Locate and right-click the Call Control icon in the system tray. You see:

![Call Control Icon](image)

2. Click Make Call. You see the Make Call to Contact screen.

![Make Call Screen](image)

- Click to refresh the displayed list of contacts to match your Contacts and/or Address Book records.
- Click to open the Contact or Address Book record for the selected contact.
- Type name + Enter to search your contacts.
- Double-click to collapse or expand the list of contacts.
- Double-click to display the telephone numbers for a contact.
- Double-click to place a call to the displayed number.
- Click to exit Make Call.
Using Make Call to Contact

To place a call to a contact:
1. Double-click a contact to show the available numbers.
2. Double-click the number you want to call.
   ■ You see Calling your extension... in the lower left of the Make Call to Contact Screen.
3. When Call Control calls your extension, answer and say “Hello.”
4. Call Control answers “Ready” and automatically dials your caller.
   ■ The lower left of the Make Call to Contact Screen provides the status of your call.

The Make Call option uses the standard dialing rules to differentiate local and long distance calls.
■ Local calls are 5-8 digits.
■ Long distance calls are more than 8 digits.

Make Call uses the trunk access codes set in the following options:
■ Customize: Tenant Options: [Access Digits] Access Digits Before Long Distance Callout on page 582.
Exiting Call Control

To exit (close) Call Control:

1. Locate and right-click the Call Control icon in the system tray. You see:

![Call Control icon]

2. Click Exit.
Call Control Screen Pop

Using the Call Control Screen Pop

When voice mail sends a call to your extension, Call Control intercepts it, plays music to the caller, and displays the Call Control Screen Pop. The screen pop shows information about your call and provides you with call handling options. You can:

- Do nothing and have Call Control route the call according to your Default Action setting after the Timeout interval. See Setting Up Call Control on page 745 for more.
- Use one of the screen pop options to handle the call and override your default settings. See The Screen Pop Options below.

The Screen Pop Options

The screen pop provides the following options (from right to left):

- **Caller ID**
  Shows the caller’s number (if the telephone system receives Caller ID for the call).

- **Caller**
  Displays the caller’s name (if you have a record for the number in your Contacts or Address Book).

- **Contacts**
  Lets you quickly access the caller’s contact record.

- **Hold Options**
  Allows you to place the call on Hold.
  - The caller hears “Please continue to hold” followed by music while they wait on Hold.
  - The have “Please continue to hold” repeat, click Hold Options again.
  - The time in Call/Timer increments to indicate how long the call has been on hold (20 minutes max.).

- **Accept Options**
  Sends the call to your extension.
  - Accept Options follows the TRF/UTRF setting of the Automated Attendant.

- **Record Options**
  Routes the call directly to your mailbox so the caller can leave a message.

- **Transfer Options**
  Transfers the call to the displayed destination.
  - You can right-click the current destination and chose one of your programmed alternates.

- **Call/Timer**
  **Call**
  - Call shows the order in which you received calls.
  - The oldest call is on the top (with the lowest number). The newest call is on the bottom (with the largest number).
  **Timer**
  - Normally, Timer counts down from your Timeout setting.
  - If the setting is 120 seconds or less, it counts down in seconds. If the setting is greater than 120 seconds, Timer decrements in minutes until it reaches 2 minutes, then continues decrementing in seconds.
  - For calls on Hold, Timer increments to show how long the call has been on Hold (20 minutes max.).
Call Control Screen Pop

Shows call order and time waiting.
See Make Call to Contact on page 757.
Caller’s name (from your contacts).
Caller’s number.
Click to send the caller to your mailbox to leave a message.
Exit (close) Call Control
Click to open the caller’s contact record.
Click to place the call on Hold.
Click to accept the call and send it to your extension.
Exit (close) Call Control
Click to send the caller to your mailbox to leave a message.
Exit (close) Call Control
Click to open the caller’s contact record.
Click to place the call on Hold.
Click to accept the call and send it to your extension.