IPitomy Dialer
Setup Instructions

Overview

Many users of business phone systems call a wide variety of phone numbers. They can be from a printed sheet, a contact program or from Microsoft Outlook. When there are many calls to make and each number has to be dialed into a phone, the process becomes tedious. To ease the process of dialing each number, IPitomy has created the IPitomy Dialer. The dialer can be used in several ways:

1) Automatically import contacts from Microsoft Outlook. Once the contacts have been imported, simply click on a contact to dial their number. Your phone will go off hook and the call will be put through without the need to enter any digits.

2) Import Contacts from a .csv (comma separated values) file. Once the contacts have been imported, simply click on a contact to dial their number. Your phone will go off hook and the call will be put through without the need to enter any digits.

3) Dialing System speed dial numbers. The PBX will automatically import any system speed dial numbers. Once the contacts have been imported, simply click on a contact to dial their number. Your phone will go off hook and the call will be put through without the need to enter any digits.

4) Click to dial from Mozilla Firefox. using the Telify add-on, phone numbers in web pages can be clicked to dial.

4) Clip to Dial - Copy - by selecting a phone number in any program running on your desktop, Select the phone number by highlighting it with a mouse. Click Control C then Control D and the number is dialed. Your phone will go off hook and the call will be put through without the need to enter any digits.

Program Setup

You first need to add your extension and Pin number to the Dialer in order for the IPitomy PBX to dial from your extension.
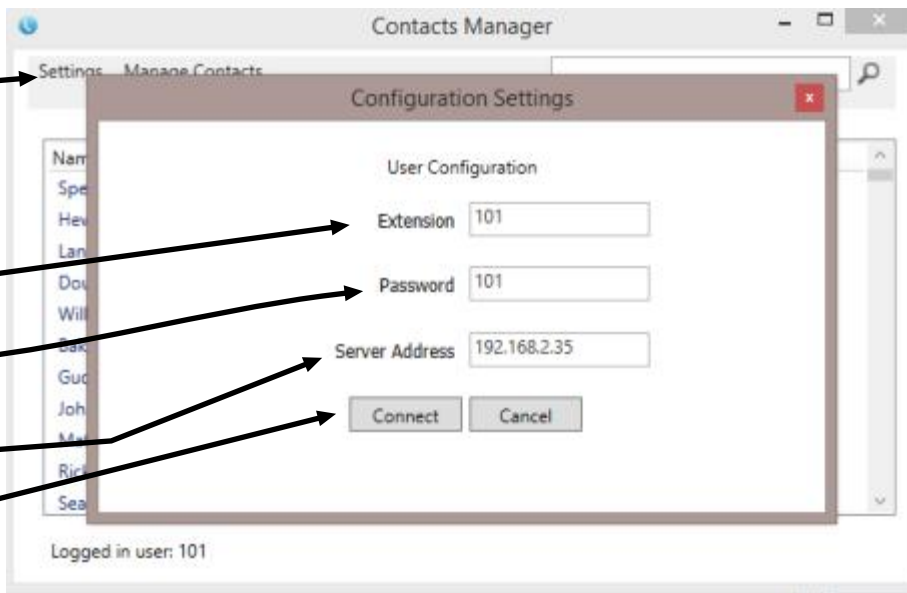
Click Settings in the upper left corner

Enter your extension number in the Extension field

Enter the PIN number you received for your Voice mail Box

Add the IPitomy server IP address. You will get this from your system administrator.

Click Connect

Now the Dialer is setup to connect with the PBX and dial out numbers from your desktop.

Before you can begin dialing, it is necessary to populate the contact dialer with contacts so you can dial them with just a click.

To import Contacts from Microsoft Outlook, you must first be using Outlook 2007 or newer. Click on Advanced under the Managed Contacts tab.

After clicking the Advanced tab, you will see the option to import Outlook Contacts. Click the Import Outlook Contacts tab. once this is clicked, the Dialer will import all of your contacts. It may take up to 10 minutes, depending on how many contacts you have.
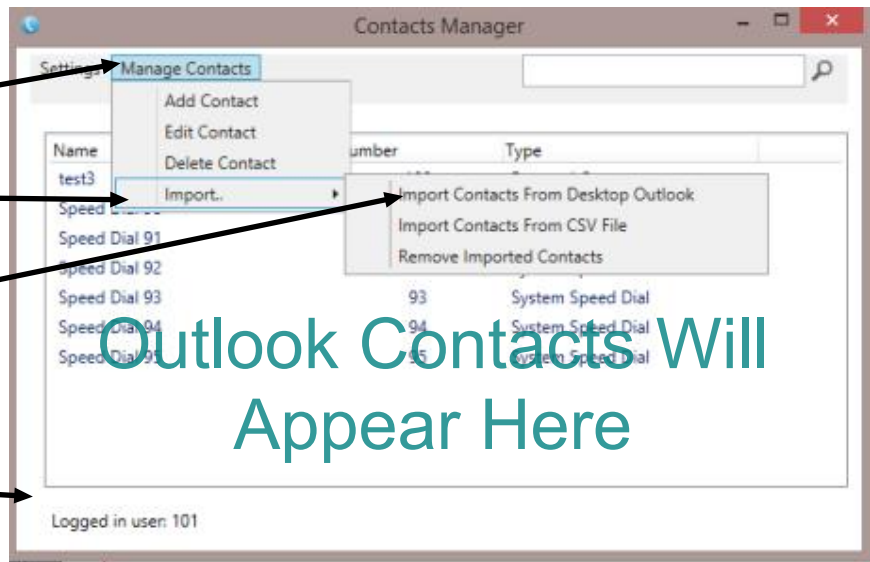
**Importing Contacts
From Outlook**

Click Manage Contacts

Click Import

Click Import Outlook Contacts

The Dialer will import all of your Outlook
Contacts. Once imported they will appear in
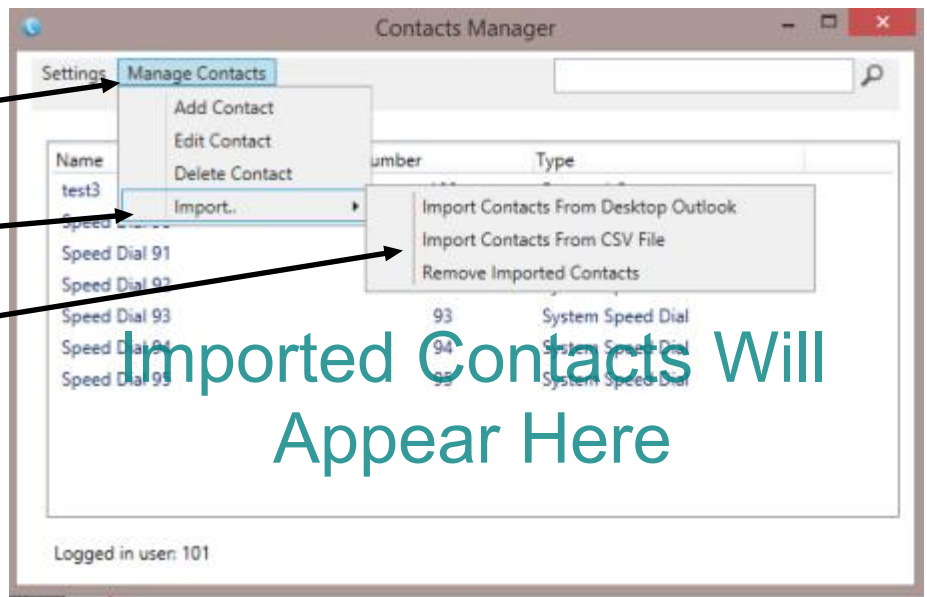a list. just click on the item in the list you
wish to dial.

Importing Contacts From a .csv File

Click Manage Contacts

Click Import

Click Import from CSV file

Older versions of outlook and Combinations of contacts from a .csv file contacts and outlook contacts.

In order to import contacts from older versions of Outlook, it may be necessary to first export your Outlook Contacts to a
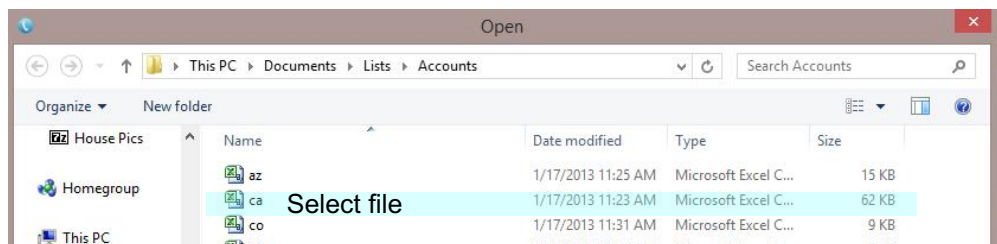.csv file. Then import the file using the .csv import function.

Using The Import From .csv Function

To import contacts from a .csv file, it is necessary to map the fields in the contact from the .csv file to match up the fields in the IPitomy Dialer contact fields.

To do this, you click on
Import Contacts from CSV
Then browse to the file you want to import on your PC
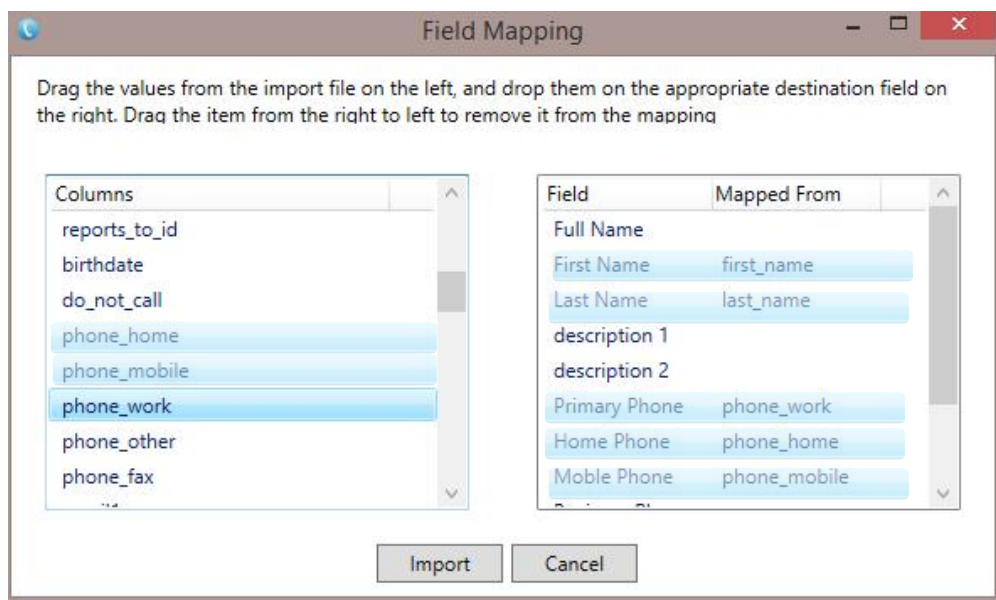Select the file and click Open

The file will then begin the import process. It is now necessary to map the fields from your .csv file to the fields in the IPitomy Dialer.

Place your mouse over the column field in the left column that best matches the field on the Right side and drag it over to the right column.

Once you have matched up the fields to want to map, then click Import.

That's all there is to it. You can update the list any time by re-importing it or manually adding the contact entries.

Once you have imported the contacts, your list will be populated with the contact information and the dialer will dial the numbers when you select a contact

When you double click a contact, the number is dialed. Your phone will go off hook (if you are using a phone that is capable) and your number is dialed.