www.InGenius.com

InGenius Connector
Quick Start Guide for IPitomy

Quickstart Guide – InGenius Connector for IPitomy
Release # 0.1
December 2009

TRADEMARKS

InGenius, InGenius Connector and the InGenius logo are trademarks of InGenius Software Inc. Windows, XP, Vista and Microsoft are trademarks of Microsoft Corporation. Polycom, CX200, C100, SoundPoint, SoundStation and the Polycom logo are trademarks of Polycom Inc. IPitomy and the IPitomy Logo are a Trademark of IPitomy Communications, LLC, Asterisk Digium and the Asterisk logo are trademarks of Digium Inc. Adobe Acrobat Reader is a registered trademark of Adobe Systems Incorporated. Other product names mentioned in this document may be trademarks of their respective companies and are hereby acknowledged.

Table of Contents

Table of Contents

1 What is InGenius Connector?

InGenius Connector is a PC application that provides search-and-dial capabilities and incoming caller ID screen pop, with full Microsoft® Outlook® and Active Directory® or LDAP Directory integration. And, InGenius Connector provides integrated web searches with GoogleMaps® and GoogleSearch® to locate and dial new contacts with just a single click. Integrated optional softphone, same great UI!

1.1 What do people love about InGenius Connector?
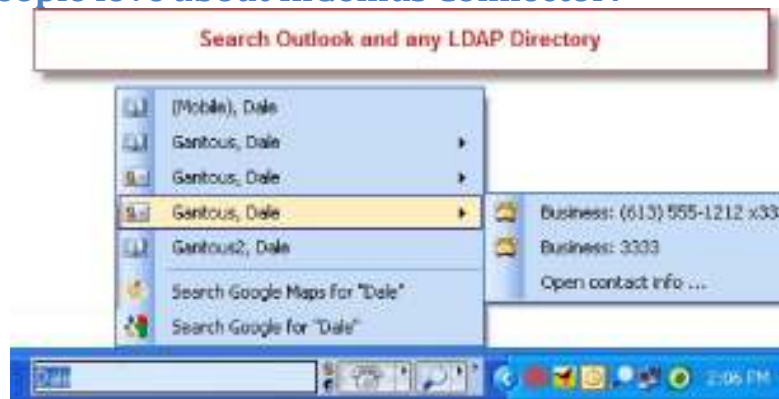
Increase Personal Productivity: InGenius Connector provides an innovative telephony toolbar GUI that allows users to manage their phone communications with speed and ease – directly from the Microsoft Windows® taskbar on their PC desktop. With features such as search-and-dial and caller ID pop-up, InGenius Connector simplifies routine communications and helps users maximize their operational efficiency.

Seamlessly Integrates Outlook® and Google®: With InGenius Connector, you can not only search your personal contacts and corporate contacts, but you can also instantly query GoogleMaps® and GoogleSearch® for the number you're looking for. The searches are localized to your geographic area, or the city that you specify. Want to order pizza? Just type pizza into InGenius Connector and voila! You can dial any of your local pizza shops with a single click. Want to get married in Las Vegas? Just enter "Cupid, Las Vegas" into InGenius Connector, click to dial and book your date! And, with a single click you can add your selected entry as a new Outlook Contact, with no typing at all!

InGenius Connector Softphone Edition: The optional InGenius Connector Softphone integrates seamlessly into InGenius Connector, providing all the same business features to your mobile workers. InGenius Connector automatically detects network configuration, and uses your local IPitomy IP phone when you're in the office, or your InGenius Connector Softphone when you're on the road. Same great integration features, same elegant toolbar user interface. No big telephone dial-pad using up precious desktop real estate or interrupting your workflow.

Enhanced Integration Features: In addition to search-and-dial and caller ID pop-up, InGenius Connector provides out-of-the-box enhanced functionality including:

- auto open a contact record based on incoming caller line ID

- create a new Outlook® contact, task, or email for an incoming caller

- Windows Desktop Search to locate documents, e-mails, and corresponding records based on the incoming caller ID – either automatically or at the click of a button.

- Missed calls, last number redial

Corporate Solution: Increase Group Productivity with InGenius Connector CRM Integrations: InGenius CRM integrations will help you cultivate customer relationships with ease and increase your customer facing employees' efficiency. InGenius Connector's plug-in architecture makes it easy to connect directly to your Corporate CRM system.

Available integrations include:

- TSP plug-in for TAPI-enabled CRM systems

- Microsoft® CRM plug-in

- Salesforce CRM plug-in

- CRM integrations available on request.

Serverless and Easy to Deploy in small or large organizations: Designed for easy configuration and installation, InGenius Connector is serverless. And it provides IT personnel with a number of implementation options – from simple end-user downloads to larger-scale pull or pushed-based mass deployment.

Low Cost of Ownership: Lack of an applications server simplifies implementation and maintenance, while reducing the overall solution cost.

2 Installing InGenius Connector

Use this procedure for the standard install of InGenius Connector.

Note: There are mass deployment and configuration options for InGenius Connector. (Please see the InGenius Connector IT Guide)

1. To initiate the install of InGenius Connector, double click the file **InGeniusConnector.msi**

2. Follow the onscreen instructions in the installation program:

    a.   If not already installed, InGenius Connector will initiate the install of Microsoft .NET Framework 2.0. (Microsoft .NET Framework 2.0 is required to run InGenius Connector)

    b.   On the License Agreement dialog, read the agreement, select "I Agree" and click "Next".

    c.   Select a folder where InGenius Connector will be installed. By default, it will be installed to "C:\Program Files\InGenius\Connector\"

3. The install will then begin automatically. Once complete, you can then choose to "Run InGenius Connector now."

4. Alternatively, to run InGenius Connector, click Windows Start menu and navigate to Programs->**InGenius -> InGenius Connector.**

3 Registering InGenius Connector

When you run InGenius Connector for the first time, you will encounter a registration dialog requiring you to enter your license key. (Figure 1)

1. Enter your license key.
2. Click "Register Now".

If you do not have a license key, contact us at [sales@ingenius.com,](mailto:sales@ingenius.com) and we'll provide you with a trial key or a full key.

Figure 1

4 Associating InGenius Connector with Your Phone

InGenius Connector stores information about the phone it connects to in a **Phone Profile**.

4.1 So what are profiles???

InGenius (IC) can connect to your phone in a number of ways, depending on the type of system you are using. You define the connection to the phone using a "profile" which tells IC how to connect to your phone.

4.2 Creating a Profile

You create phone profiles in two ways:

1. If you install InGenius Connector as a fresh install, InGenius Connector prompts you to create a new phone profile when it first runs.
2. Or, you can manually add phone profiles as the need arises.

4.3 Creating an 'IPitomy Server Connection' Phone

Profile

IC can talk directly to the IPitomy IP PBX server when IC is configuredusing an Asterisk profile. It communicates with the IPitomy IP PBX using something called an Asterisk Manager Interface or AMI port. On the IPitomy IP PBX verify that the appropriate InGenius Licensing is enabled.

> For information on purchasing InGenius licenses for the IPitomy IP PBX,
> contact IPitomy sales at 941.306.2220 or sales@IPitomy.com.
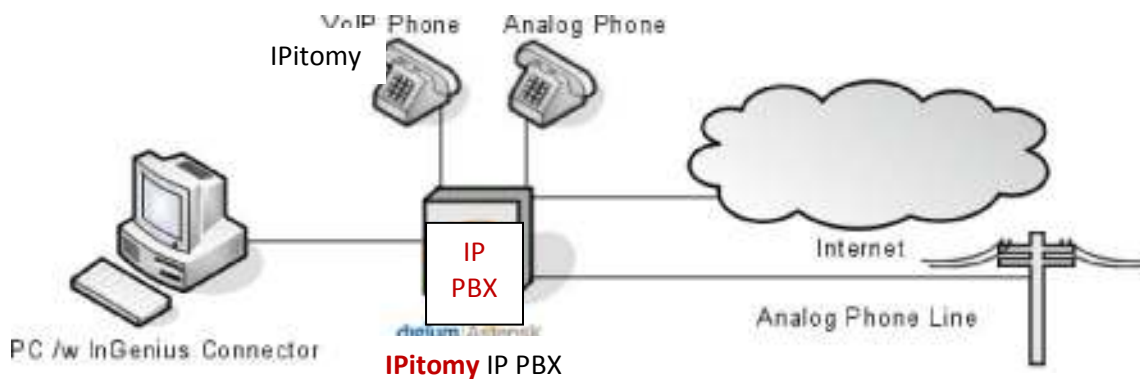
Figure 2

On the InGenius "Configure a Phone – InGenius Connector" screen (Figure 2), select "Asterisk Server Connection" from the *Phone Model* drop down menu.

4.3.1 Supported IPitomy Servers
IC supports the use of IPitomy IP1100, IP1200, IP2000, and IP5000 IP PBX Systems.

4.3.2 Benefits of using an IPitomy IP PBX Server with IC

IC can work with ANY phone connected to your IPitomy IP PBX server. IC does not care which phone manufacturer or model it is. It can even work with Analog phones, if you have them connected to your IPitomy IP PBX!

4.3.3 Notes to be aware of with using an IPitomy IP PBX Server with IC

When using an Asterisk Server profile, you will be able to see caller ID information pop-ups for incoming calls, and you'll be able place calls. You will not, however, be able to answer incoming calls using the IC toolbar.

The steps for placing a call using InGenius may vary depending on the IPitomy configuration. Typically when you initiate a call using InGenius, your phone will ringWhen you answer the ringing phone, the call is placed to the outside number.

4.3.4 How to setup IPitomy Server Connection through IC

To associate IC to an IPitomy Server Connection, you can use either the initial Configuration page (see Figure 2) or the IC Settings page pictured here (Figure 3).

     1. On the "Add/Edit Phones" tab, select the "New Profile" Button:

Figure 3

2. Enter a name for you new phone in the "Location" field and select "Asterisk Server Connection" from the drop down list. Press OK.

Figure 4

3.
4. You will now see a configuration page like the one below (Figure 5):
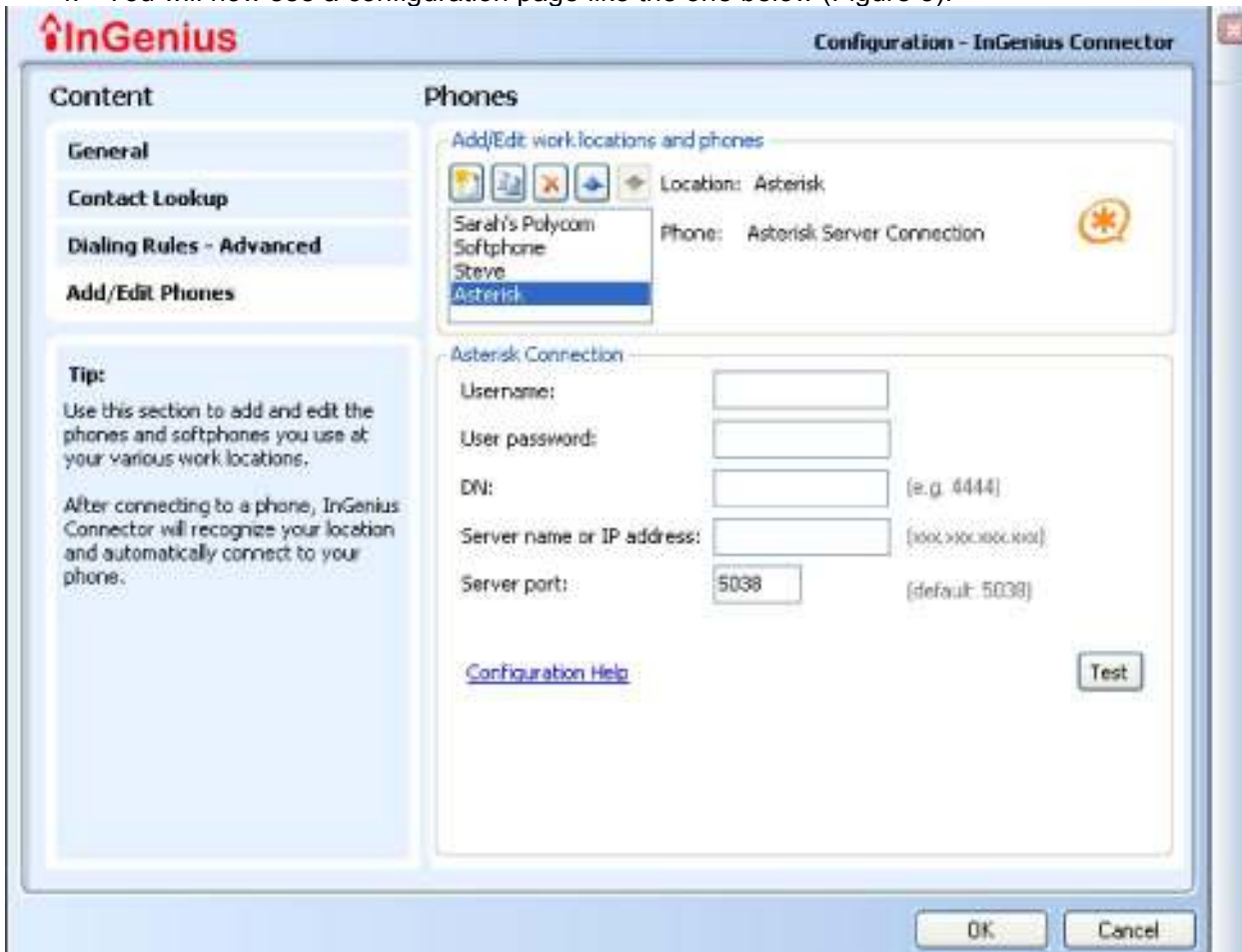

Figure 5

5. All fields are required to setup the phone:
  - **Username**: This is the name that we will use to log into the IPitomy IP PBX. Contact your IPitomy Administrator to get the proper name. This field may either be the DN (extension number) of the phone that you wish to control or another name.

- **User password**: This is the password that we will use to log into the IPitomy IP PBX. Contact your IPitomy Administrator to get the proper password. This field may either be the DN (extension) password of the phone that you wish to control or another password.

  - **DN:** This is the actual Phone Extension that you wish to control.
  - **Server Name or IP:** This is the address of the IPitomy IP PBX server
  - **Server Port:** This is the port enabled on the IPitomy IP PBX to allow Commands to be sent to the server. Default is 5038.

5. Press the "Test" button to verify your settings. (See section 3.5 *Testing an IPitomy IP PBX Server Connection* for more information.)

6. Press "OK" to save your settings as a new profile.

4.3.5 T

> Note: the IPitomy IP PBX verify that the appropriate InGenius Licensing is enabled.

Once a phone has been configured you can press the "Test" button to verify the connection parameters. Once the "Test" button has been pressed, IC will attempt to contact the IPitomy IP PBX server with the information provided.

1. If the test completes successfully you will see a dialog similar to the one below:

---
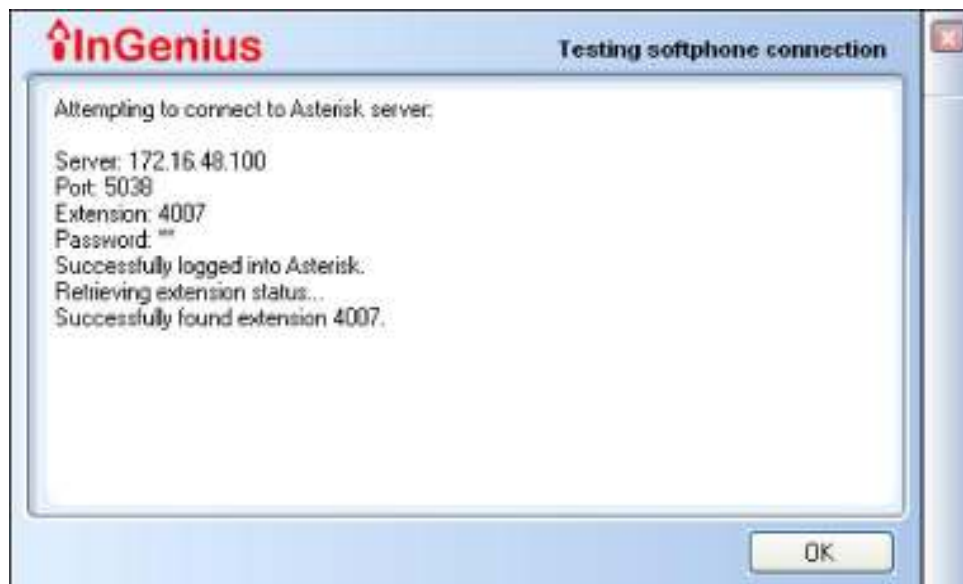
2. If the test did not complete successfully you will see a dialog similar to:
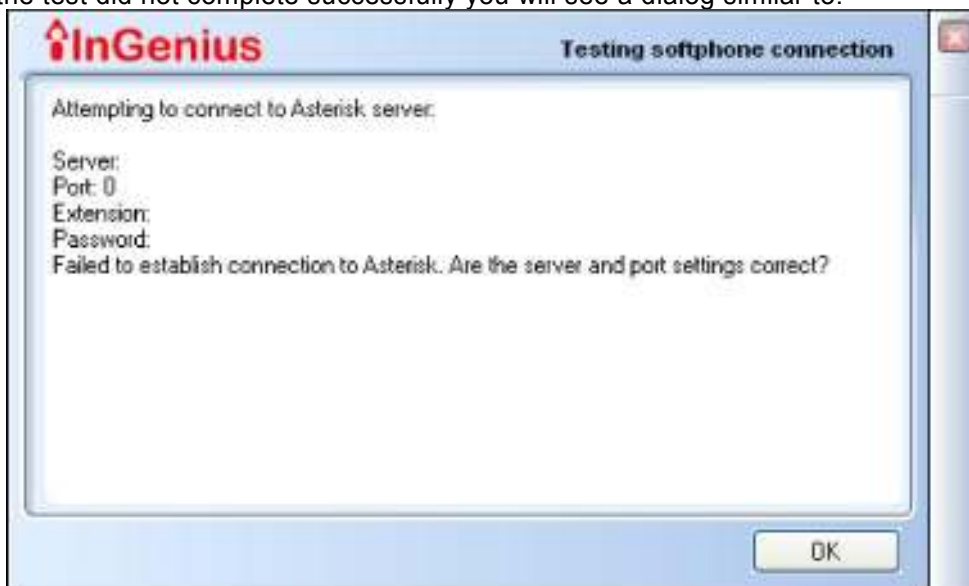
3. If you have the correct server settings but the Extension you are trying to control does not exist on the IPitomy IP PBX, you will see an error similar to below:

5 InGenius Connector Toolbar

All InGenius Connector features are available from a convenient toolbar. To display it, right-click on the Windows task bar, select the Toolbars sub-menu then select InGenius Connector. The toolbar will be displayed when you run InGenius Connector.

You will then see the toolbar GUI shown here:

You can hide the toolbar by following the same steps to uncheck the InGenius Connector option.

5.1 Click to Dial: Dialing by Name

When you type a name in the text field of the InGenius Connector Toolbar, a list of matches and alternate phone numbers from both your Corporate Directory, if applicable, and Outlook contacts will be displayed. To dial, just click on the phone number match that you want. By combing Windows telephony settings with InGenius Connector dialing rules in the application settings, InGenius Connector can insert and dial the access code (for example, '9') and the area code for you automatically!
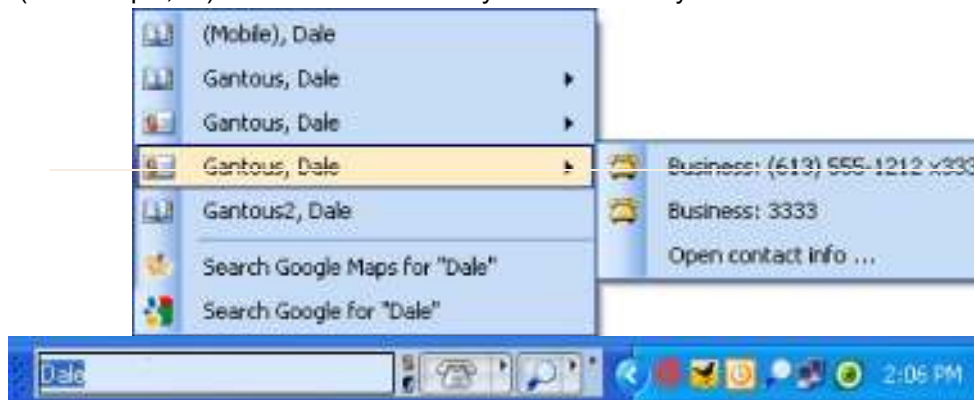
5.2 Dialing by Number

InGenius Connector offers a number of ways to dial (and it can insert and dial the access code and the area code for you automatically!)

5.2.1 Dialing by Typing in a Number:

Type a number in the text field and press the dial button.

5.2.2 Dialing by Drag'n'Drop

Highlight a number in a Word document, email, etc, drag the number into the text field, and press the dial button. You can also use copy and paste.

5.3 Incoming Calls

Incoming calls get displayed in the text field of the InGenius Connector Toolbar, and the phone button flashes. You can also configure InGenius Connector to display or a pop-up window when you receive an incoming call.

Answer the call by clicking the Answer button on the Pop-up.
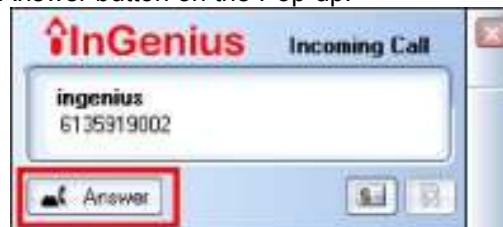
From the Incoming Calls Pop-Up, you can also open an Outlook contact or do a Microsoft Desktop Search based on the Caller ID

After the call, you can return a call to this person by just clicking the dial button. There is a Missed Calls and Redial list as well.