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Itel Office for UK PSTN Installation Guide Version 1.1

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Introduction

Itel Office for UK PSTN is a contact management system. Essentially a database system to manage and track contacts. It can detect inbound calls, extract the Caller ID and automatically lookup the caller, presenting the appropriate contact record while you answer the call. Think of it as a contact and office organiser.

A big theme of the product is ease of use. Ease of use is built into the installation process too.

Pre-Requisites

Operating System

The following operating systems are supported:

Windows 7, 8 and 10 64 bit.

If you require a 32 bit Windows operating system version please enquire through the website.

Web Browser Support

The following web browsers are supported:

Google Chrome

Microsoft Edge

Mozilla Firefox

Note that Microsoft Internet Explorer is not supported.

Telephony Environment

Itel Office for UK PSTN is designed to retrieve Caller ID via the Comet CTI USB Caller ID hardware.

This device is suitable for UK public switched telephone network use. VOiP telephony is not supported in this product.

your telephone network provider must have enabled Caller ID on your telephone line for screenpops to work. There are various names used for this feature including:

CLIP

Caller Line Identity Presentation

Caller display

If you are not sure if this service is enable, call your telecoms provider and check that caller display is enabled on your line. Dependent on provider, there may be a charge for enabling this service.

If you have a caller ID enabled desk phone you can try ringing in with another phone and verifying that the Caller ID is displayed on the phone display.

notes on how to check you have CLIP - how to order from your provider.

Computer Hardware

The software runs on Windows operating systems so a computer that supports Microsoft Windows is a pre-requisite. In addition, the Caller ID hardware is either USB or serial so either of those interfaces is required.

Preparation

The software can be installed before purchasing the Caller ID hardware. The drivers to support the hardware are installed when you install Itel Office and when you are ready to connect the telephony hardware you can simply connect up the cables and the computer telephony integration will work as soon as you are connected. There is no need to install the hardware first.

Hardware Setup

Currently, two brands of telephony hardware are supported for PSTN operation:

1. Comet USB Caller ID device from Crucible Technologies.
2. Whozz Calling Analog Caller ID device from callerid.com

To setup either of these devices, follow the hardware specific steps below.

Setting up the Comet USB Caller ID Device

The setup is simply connecting the cables. For the system to work a telephone and the Caller ID box must be connected to the same PSTN wall port (or telephone system providing PSTN/analog interface).

The photo below shows how to connect the cables.

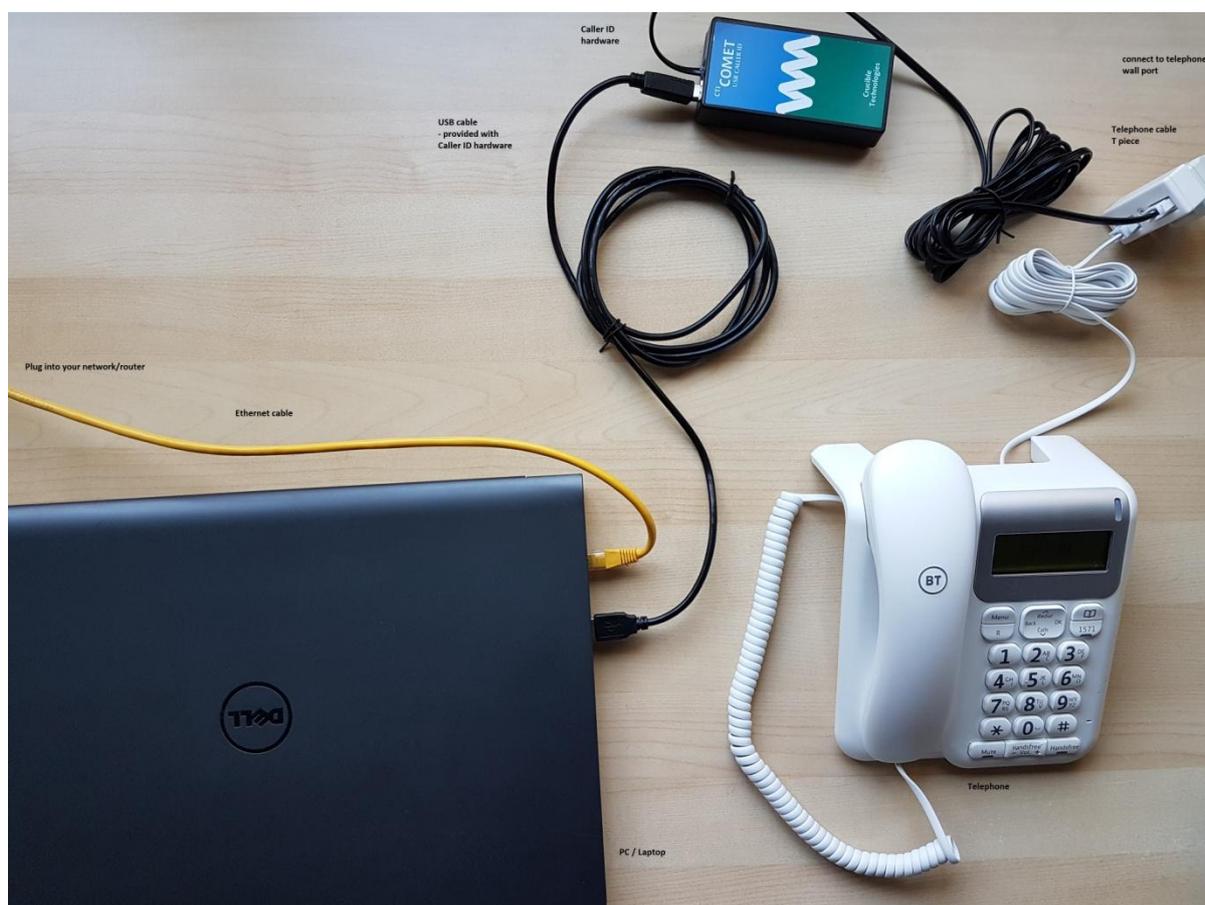


Figure 1: Connect the hardware

As seen in the figure above, the black USB and telephone cables are supplied with the Comet device. To enable the Comet and the telephone handset to share the telephone line, a T piece is required. These can be purchased inexpensively from any telephone parts retailer.

Setting up the Whozz Calling serial Caller ID Device

The Whozz Calling? Basic 2, 4 and 8 devices are supported from callerid.com.

The differences in these models are in the number of telephone lines that can be monitored. The Basic 2 can monitor up to 2 analog lines, the Basic 4 can monitor 4, and the Basic 8 can monitor up to 8 lines. Itel Office currently, is designed for an individual to manage their personal contacts in their own copy of a database, so usually the Basic 2 model would be most appropriate.

These models can be connected to a PC via a direct serial cable or a serial to USB cable. The picture below shows a USB to Serial Cable 1.8M, BENFEI USB to RS-232/DB9(9-pin) Cable. Many PCs do not have a serial port but generally do have USB ports, so the serial to USB cable is most convenient. However, if your PC already has a serial port, then a serial port cable would also work. The Basic 2/4/8 units have a female DB9 connector as shown below.

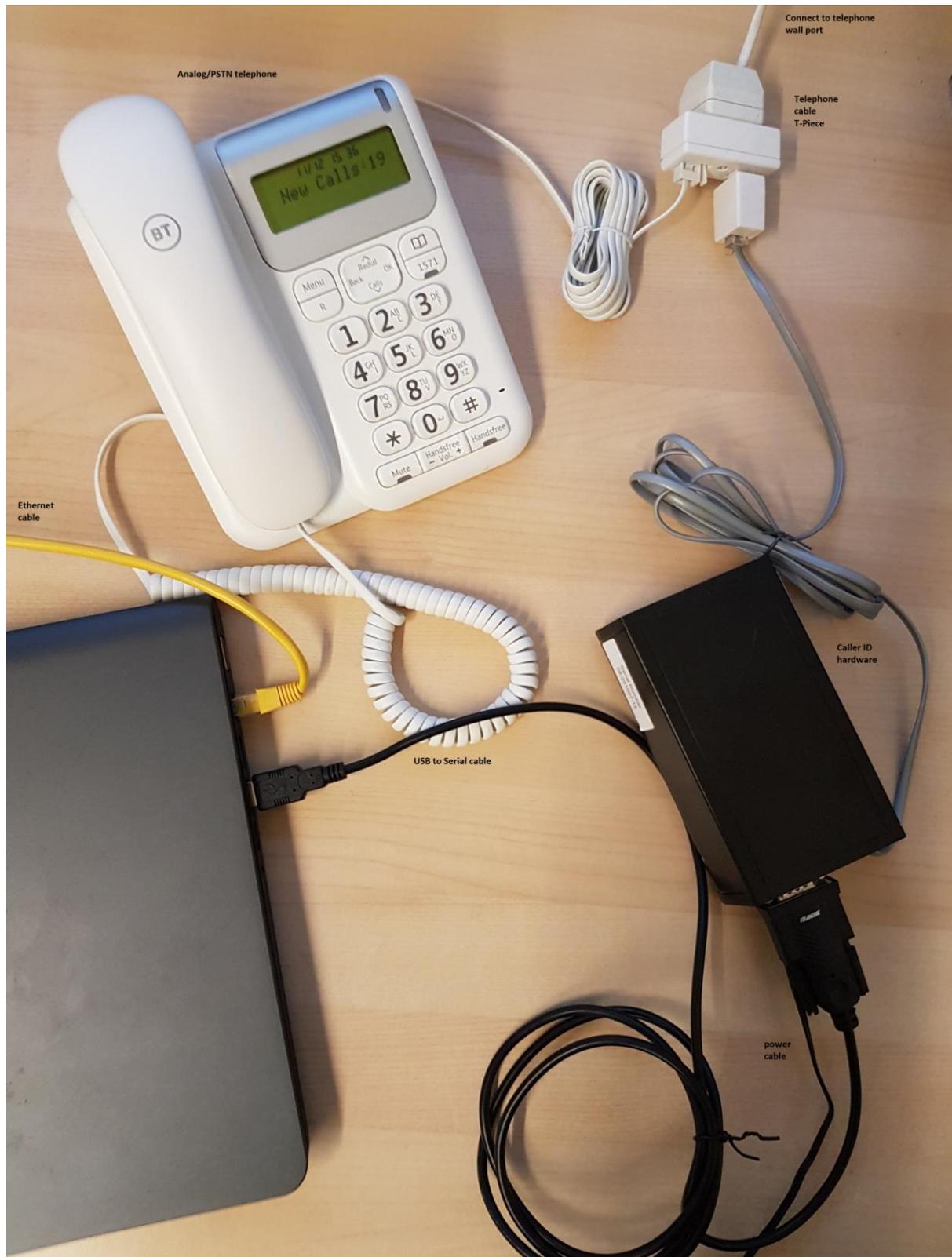


Figure 2: Connect the Whozz Calling hardware

The photo below shows how the cables are connected to the Whozz Calling device.

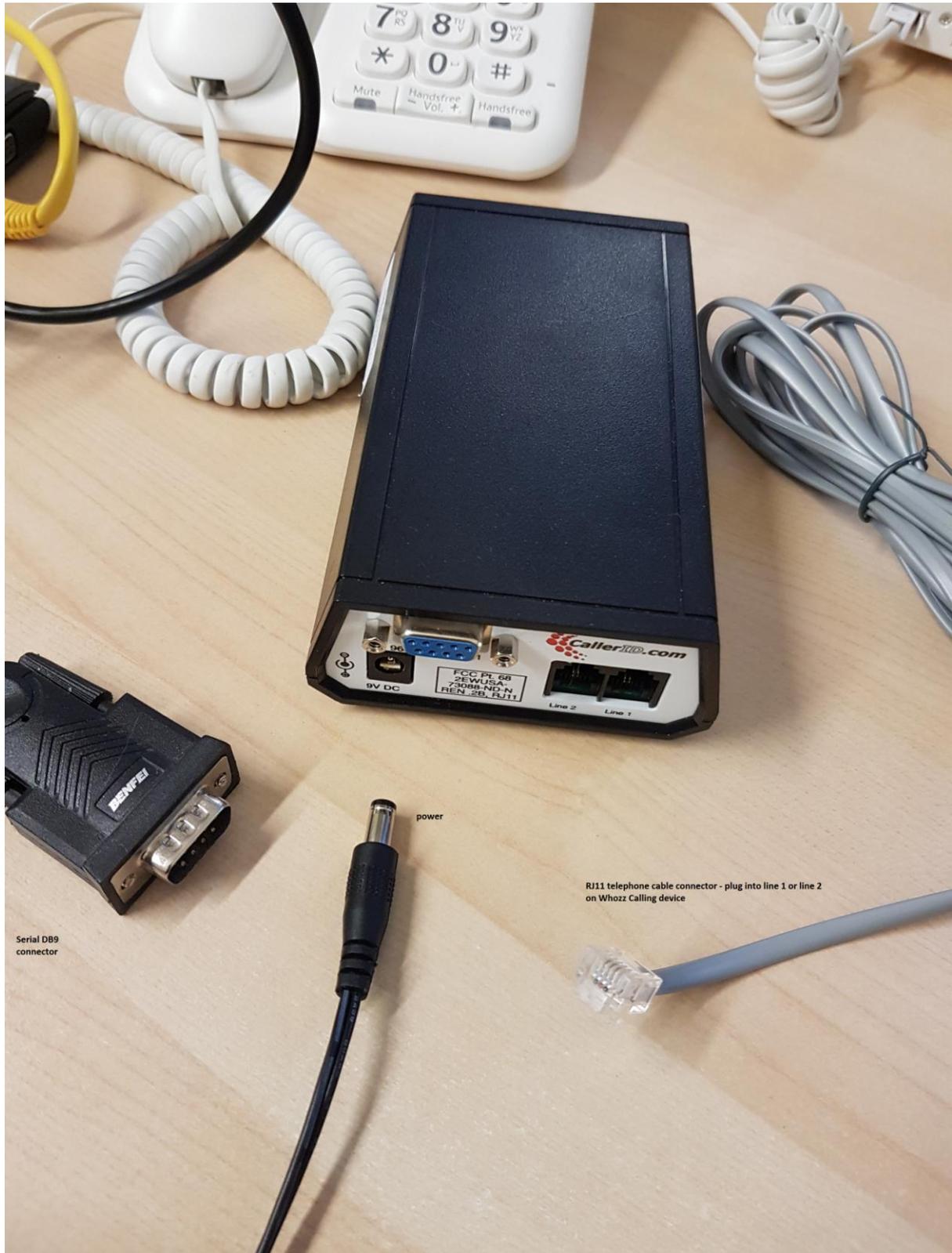


Figure 3: Connecting the cables to the Whozz Calling device

Sometimes drivers must be installed for your operating system to recognise the serial to USB cable, but generally these should be installed automatically without any manual intervention. However, it can take some time for the drivers to load the very first time the device is recognised so please be patient.

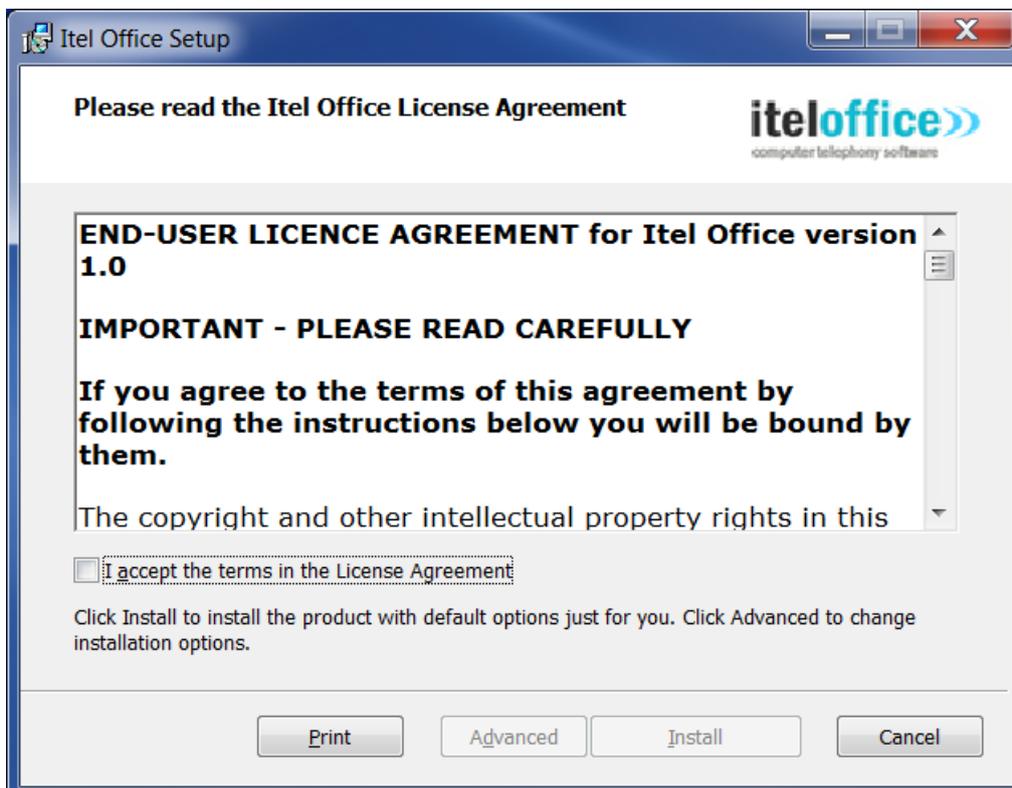
Installation Procedure

1. Download Itel Office For UK PSTN from this link:
http://iteloffice.com/downloads/iteloffice_downloads/ItelOfficeInstaller.msi
2. double click on the downloaded ItelOfficeInstaller.msi file to start the install process.

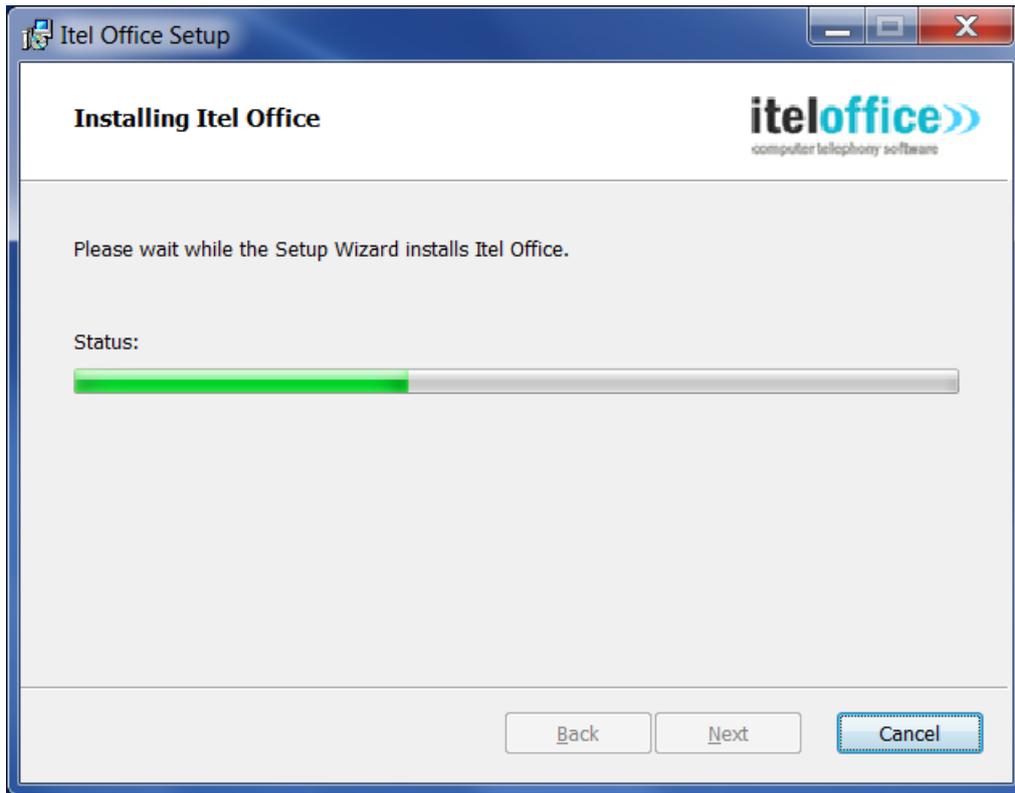


3. Click Run.

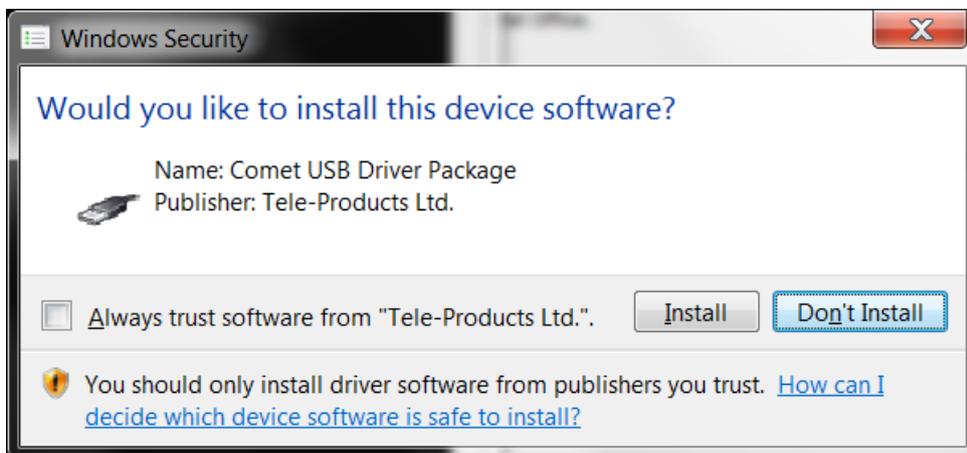
4. At the licence screen, if you are happy to accept the agreement, select the 'I accept the terms of the License Agreement' and click Install.



5. The installing dialog displays progress in setting up your system to use Itel Office



The installation process installs drivers for the Comet USB Caller ID device, click Install on the driver install dialog (not required if you do not need computer integration).



6. Select the Launch Itel Office checkbox and click Finish.



7. The Itel Office web application should now successfully available to add or import contacts.

Note that if your default web browser is not one on our supported browser list, then you may need to launch the Itel Office url, <http://localhost/index.html>, from one of the supported browsers.

Enabling Screenpop

Most browsers, by default, disable pop up windows. This is a good thing, but to enable screenpop, you need to tell your browser to make an exception. Steps for the three supported browsers below:

Enable Screenpop in Google Chrome

1. In Chrome, select the horizontal 3 dots menu to the right of the address bar, select Settings.
2. In the search box enter pop
3. Select Site Settings, Pop-ups and redirects.
4. Under Allow, click Add <http://localhost> 5. Click Add

Enable Screenpop in Microsoft Edge

1. In Edge, select the horizontal 3 dots menu to the right of the address bar, select Settings.
2. In the search box enter pop
3. Select Site Settings, Pop-ups and redirects.
4. Under Allow, click Add <http://localhost> 5. Click Add

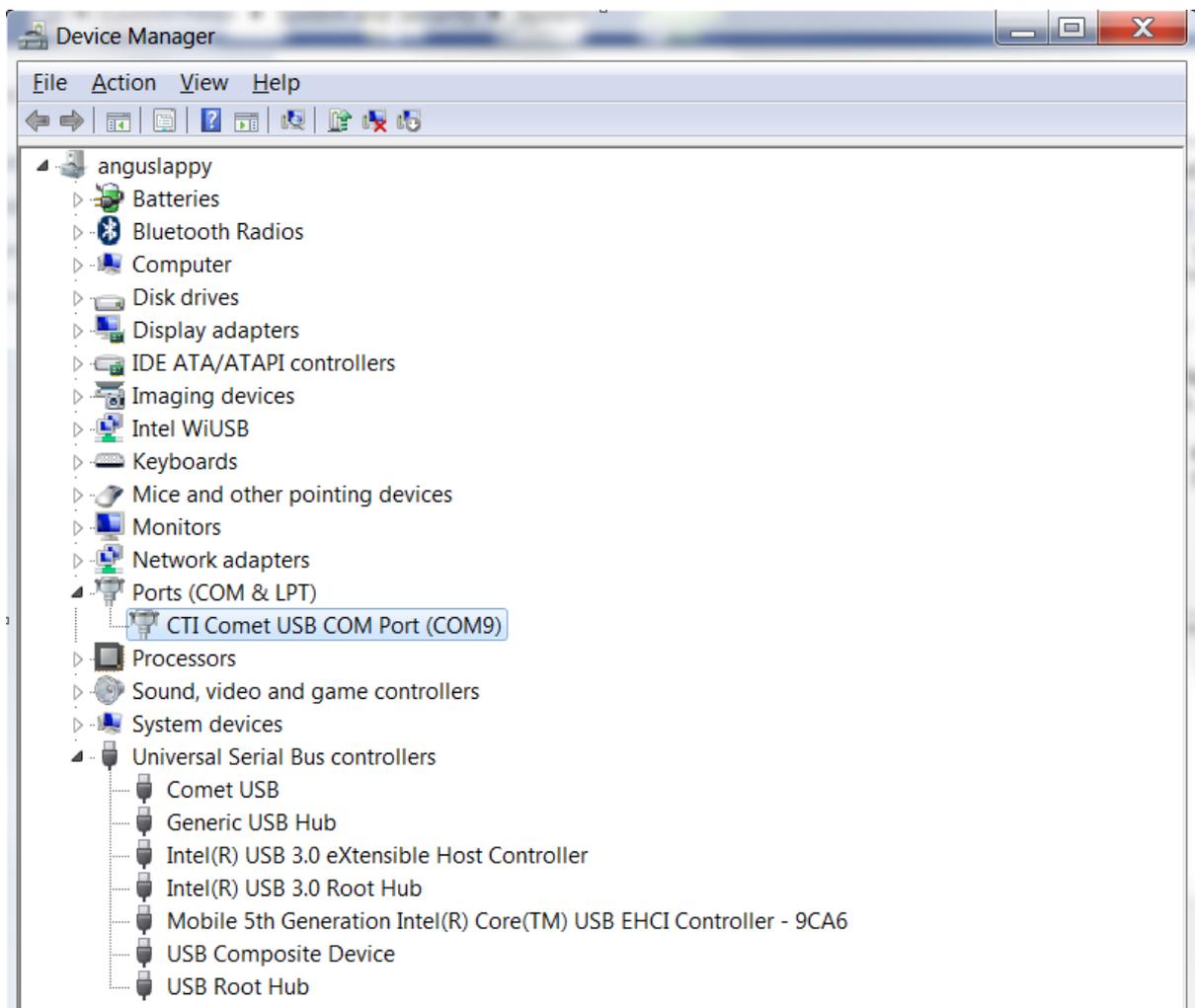
Enable Screenpop in Mozilla Firefox

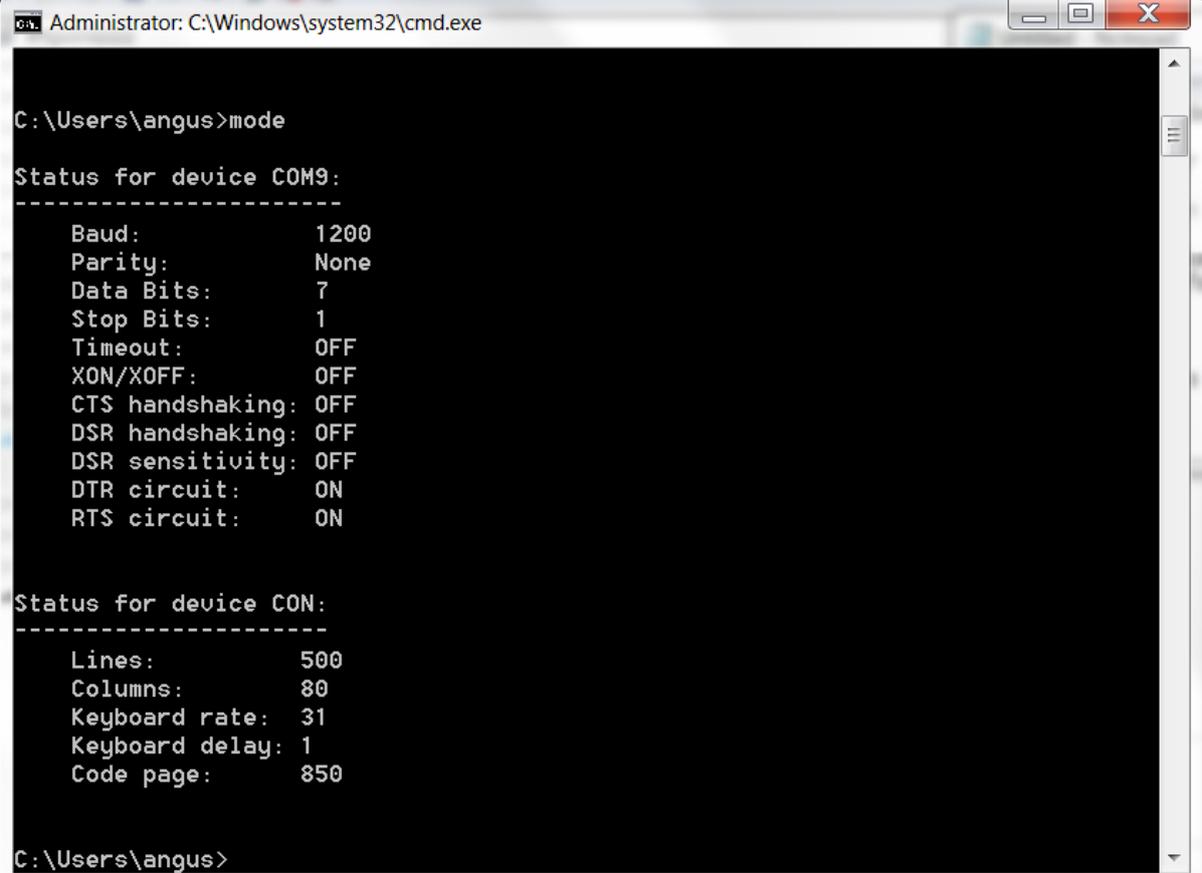
1. In Firefox, select the 3 parallel horizontal bars menu to the right of the address bar, Options.
2. In the search box enter pop.

3. Underneath you should see a Block pop-up windows Exceptions button, click there.
4. Enter `http://localhost` and click Allow.
5. Click Save changes button.

Verifying Telephony Integration

1. Connect your Comet USB device's black telephone cable with BT connector into your telephone port.
2. Connect the USB-A connector to an available port on your PC.
3. You may hear a beep after connecting the cable. It can take a few minutes for the drivers to install so please be patient at this step.
4. You can verify that the drivers have been successfully installed in either Windows Device Manager or on the command prompt using the mode command.





```
Administrator: C:\Windows\system32\cmd.exe

C:\Users\angus>mode

Status for device COM9:
-----
Baud:          1200
Parity:        None
Data Bits:     7
Stop Bits:     1
Timeout:       OFF
XON/XOFF:     OFF
CTS handshaking: OFF
DSR handshaking: OFF
DSR sensitivity: OFF
DTR circuit:   ON
RTS circuit:   ON

Status for device CON:
-----
Lines:         500
Columns:       80
Keyboard rate: 31
Keyboard delay: 1
Code page:     850

C:\Users\angus>
```

If the Comet device or no device is seen in the Ports section of Device Manager then you may need to wait for the drivers to be installed. Also check that you have connected the device into the USB port firmly. If after some time, the port does not become available, please raise a support ticket with Itel Office support.

5. Click on Call Log tab in Itel Office.
6. Click on the Start Call Monitoring button. In the blue status block on this page you should see the text: Telephony device reported state: operational.
7. Make an incoming call to the telephone number into which the device is connected.
8. You should notice the caller's number inserted into the Call Log table and the tabs switch to Contacts and the telephone number inserted into a telephone number field. At this stage you can now enter details about the caller and click the Save button to store these details.