

# Setting Up for Auto-Dialing

If this is the scenario you face in today's age, it's almost criminal.

There it is on your computer screen: a telephone number that you want to dial. But you have to do it manually. First you must read the sequence of numbers with human eyeballs, then transmit that sequence through your human brain, and finally physically punch each number using human fingers.

If you must do all that — when the number is already electronically-understood in a machine, and it's so easy for machines to electronically communicate one to another — something is wrong.

It should not be so!

Wherever it is that your machine already has such a number, it positively should require no more than a simple click, by you, for that number to be dialed.

Also, once you get used to this simple aspect of modern convenience, you'll never want to go back. It's how telephone number dialing should work.

Happily, ServiceDesk has offered auto-dialing virtually from day one. And we have not sat still. As technologies change and improve, we have continued to add options for new methods by which to achieve this end.

## ***Chapter 1***

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### **How to Setup with an Old-Fashioned Dial-Up Modem (and for POTS-Only Type Systems)**

POTS stands for "Plain-Old-Telephone-System." It refers to the kind of system that preceded the internet. (Since the internet became so ubiquitous, there has been widespread conversion away from POTS toward VOIP, which stands for "Voice-Over-Internet-Protocol".)

Likely, your office does *not* use a POTS system, and has instead migrated to a more modern, VOIP-based system. If that is accurate, please skip this chapter and proceed to the next.

If your office *is still* using a POTS system, the main ServiceDesk manual contains an appendix section with clear instructions on how to use an old-fashioned dialup modem, as means by which to achieve auto-dialing. Please consult there if this is the method you wish to use.

## Chapter 2

### Using the Windows *Dialer* App

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For at least the last twelve years, every Windows installation has featured a tiny little application called *Dialer*. This app is potentially important, because it is the heart of a very easy way to do auto-dialing from ServiceDesk.

The basic concept in this setup is simple. You click to on a telephone number to tell ServiceDesk you want it to be dialed. In response, ServiceDesk makes a little “call-out” to Windows, saying: “Hey, Windows, dial this number for me.” Windows then makes a “call-out” of its own, specifically to this little Dialer app, asking it to make the call. Assuming the Dialer app is appropriately configured to connect into your telephone system, it all works perfectly — and all but instantly.

To see this little Dialer app, press the Windows button on your keyboard, and type “DIALER.” You’ll see a reference appear to “*dialer.exe*.” Click on the reference, and you’ll see this interface:



If you click on “Tools” in the Dialer app’s menu bar, you’ll see it leads you to couple of different interfaces wherein a few different settings can be entered. Essentially, these settings tell the Dialer what it needs to know in order to talk successfully with your telephone system.

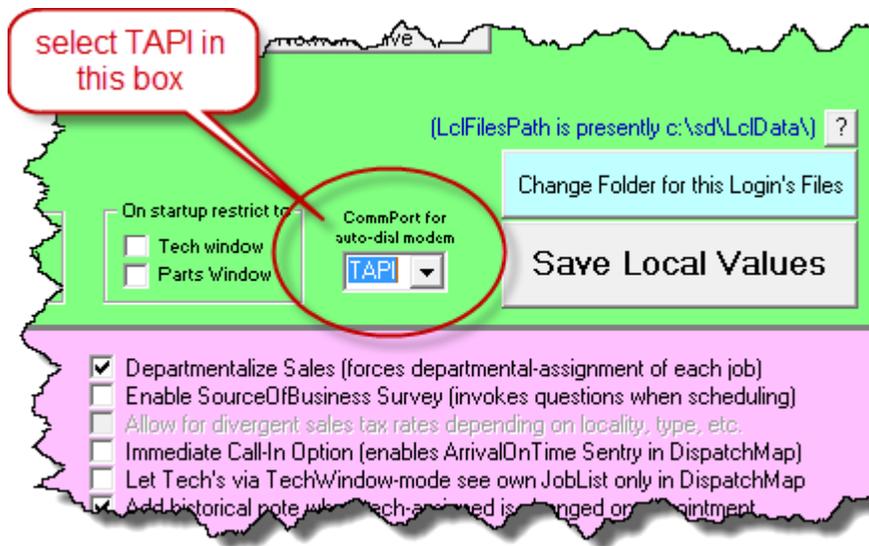
In regard to such settings, we cannot (at Rosswire) tell you what they need to be. It all depends on the nature of your telephone system and how it is installed. If your system was installed and configured by an in-house IT person, it’s likely that person will know how (and should be competent) to configure those settings.

Otherwise, it's likely you'll need assistance from whatever separate company was involved in installing and setting up your telephone system.

The general and banner point on this is as follows:

If using this method, it is ultimately a task that must be fulfilled on your side (likely in dependence on your telephone provider) to configure the Dialer app so that it can talk successfully with your telephone system.

To emphasize, setup of that Dialer app is the core and simple need. Once that has been accomplished, the remainder is dirt simple. At any workstation where the Dialer app has indeed been configured to work, just go into the ServiceDesk *Settings* form (shortcut is Ctrl-F1). In its green (local-settings) section, select as indicated here:



That's all you must do.

With the above done, when you right-click on any telephone number in ServiceDesk (in some contexts it is double-click instead), ServiceDesk makes that simple "call-out," and, very shortly, the number will be dialed. It's like magic.

Thus, it's very simple indeed.

If you are wondering what happens from a human standpoint, BTW, it's very simple. Your phone rings, prompting you to connect to the outgoing call via headset or by picking up your handset or by engaging the speaker phone. You hear the standard tones indicating the call is going out, eventual ring tones, answer on the other end, etc., and proceed as per normal.

## **Chapter 3**

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### **More about Making the *Dialer* App Work**

It may be useful to know that the protocol a telephone system must use, if it's to communicate with the Dialer app, is called TAPI. The acronym stands for *Telephone Applications Programming Interface*. It's a standard that was developed by Microsoft for the explicit purpose of accommodating communications between telephone systems and PCs. Because this protocol is so common, any competent and modern telephone positively *should be* equipped to work with it.

A common expression to indicate such competence is "TAPI-compliant." Thus, if you are shopping for a telephone system (and if you want to assure it will be capable of linking to auto-dialing via this method), a good thing to ask is if it is TAPI-compliant.

Here in Rossware's office, we use an open-source telephone operating system called *Asterisk*. Asterisk is likely the predominant operating system for VOIP-based in-office telephony, and it *is* TAPI-compliant. If you Google for Asterisk-based telephone hardware, moreover (i.e., handsets, headsets, etc.), you'll find the selection is enormous and attractively priced. At any rate, when it was time (for our purposes) to connect our Asterisk system into the Windows Dialer (so that we too can do auto-dialing), we found it was quite easy.

It's true, of course, we have some significant IT expertise here, and you may have less. That is why you will likely find the best path, for you, is to rely on your telephony provider for such setup.

In regard to such reliance, one of the largest providers of VOIP-based telephone service is Vonage, and chances are not bad that Vonage is your provider. Prior to late 2017, we'd been told by clients that Vonage was refusing to enable the Windows Dialer (apparently out of fear it would be used for mass-market calling). More recently, however, Michael Basich (of Michaelson's Appliance Service in Tampa) came on the scene. After much effort, he was sufficiently persuasive with Vonage so as to persuade them to provide a path to solution. In the near future, we plan to add documentation here as to how that path works.

Regardless of your system, so long as it purports to be TAPI-compliant (and so long as dependence on the Windows Dialer is the path you want to use), our suggestion is that you "hold your provider's feet to the fire." Make them prove such compliance by setting up the Windows Dialer on your behalf.

## **Chapter 4**

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### **An Alternate and Turn-Key Solution**

Rossware has partnered on a few things with the good people at Service Company Solutions (hereinafter "SCS", it's the same operation as is behind "The Blue Book"). This path involves another such partnership. In particular, besides other "for-

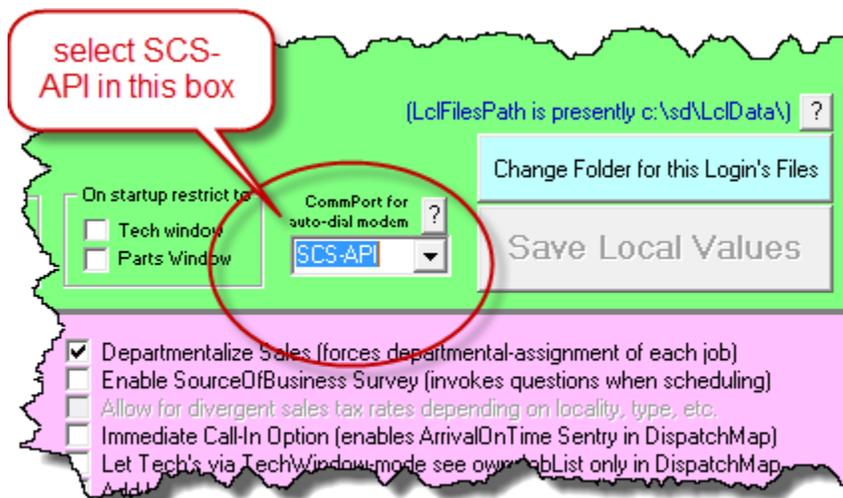
appliance-repair-company” services, SCS has developed an excellent VOIP-based telephony system package. SCS provides direct setup and support, which makes transitioning into their system (and continued use) into a comparatively worry-free proposition.

Better still, SCS and Rossware worked together to create direct integration between their telephony system and ServiceDesk.

Even better still, this integration works not *just* in regard to auto-dialing. It also works in regard to Caller-ID functionality.

And, even more remarkably, we’ve worked to make setup of the needed communications almost brainless.

On the auto-dialing side, once you have your SCS-provided CTI-type phone installed and configured (it’s a task that we understand SCS will either be doing for you or holding your hand to assist), all you must do in ServiceDesk is go into the *Settings* form (shortcut is Ctrl-F1). In its green (local-settings) section, select as indicated here:



That’s it! With that simple action, auto-dialing (via the SCS-provided telephone system) should now work perfectly.

(FYI, we need to also provide instructions on making Caller-ID functionality work, when connected to an SCS system. We’ll need to either expand the subject matter of this handbook (its present title limits it to auto-dialing), or make another little handbook. Look for either coming.)