ProCall Enterprise - **Quick Start**

Your extension always in reach

Clicking on your extension sets it as the default. This is used as the selection for every telephony action you execute in ProCall (e.g. calling a contact). Right-clicking on the extension allows you to display other settings or assign a unique name (e.g. mobile):

- Set/remove call forwarding
- Set/remove call protection
- Remote Office* on/off
- Calling number suppression* on/off

Search bar, results and status

All associated contact databases (e.g. Microsoft Outlook, CRM and inventory management system) can be searched by entering a contact or search term into the search bar. Complex searches can also be executed using an intelligent search input (search parameters separated by commas).

Audio/video communication

Once you have configured your devices for audio/video communication in ProCall, it is possible to immediately establish an audio/video chat with another contact. There are three types of chat:

- Text chat
- Audio chat
- Audio/video chat

Chat is initiated either in the context menu or the quick launch bar. The A/V devices can be deactivated during the conversation and the discussion ended.
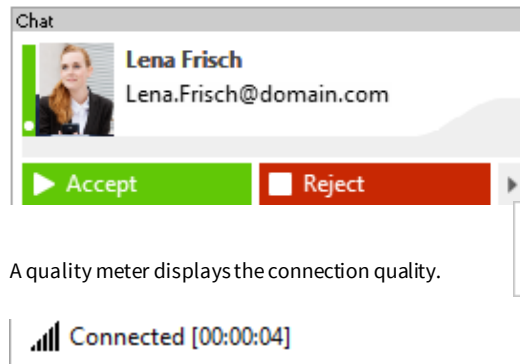
A quality meter displays the connection quality.

*Optional: In order to use this functionality, it must first be activated by your administrator or it requires special privileges.

Setting and detecting the presence status

The presence status is formed in accordance with defined rules and on the basis of services, for example, the calendar or telephony service. From this, the presence status of a user is determined automatically. The status can also be set manually.

ProCall specifies the following presence statuses:

- Available
- Do not disturb
- Presence information unavailable
- Busy
- Out of office
- Inactive

ProCall 5 Main Window
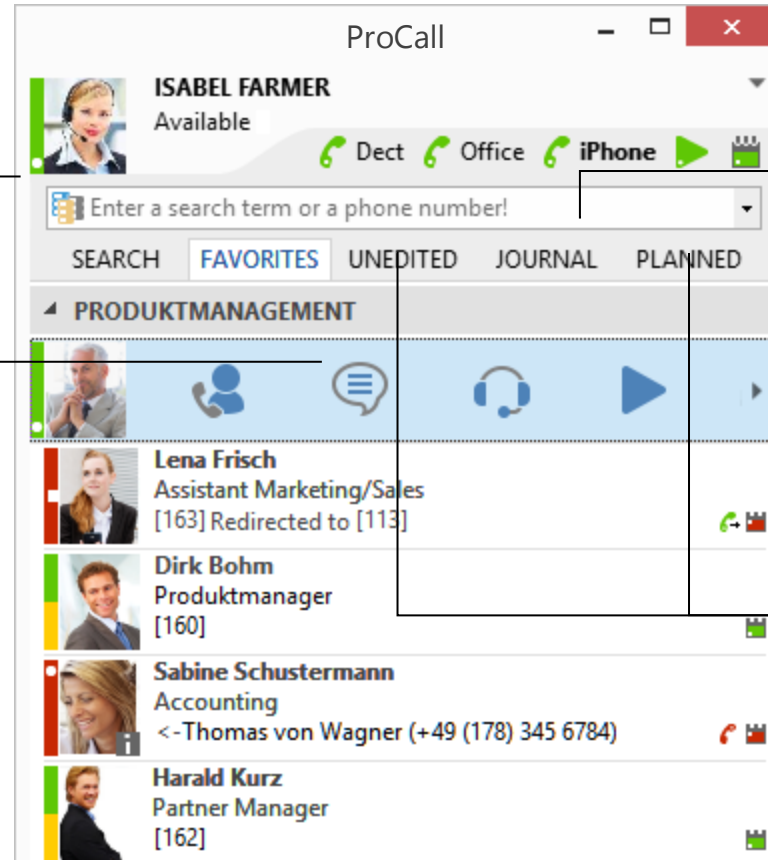
Active Contacts Technology:

Right-click on the contact or search result to display additional information (e.g., website, address, site plan) as well as other options for contacting this person (by telephone, chat, fax, e-mail or text) or working with them more effectively (desktop sharing):

Share screen contents*:

You are able to share your screen content with a colleague, for example, to work together on topics or edit documents simultaneously without having to leave your desk. Details about sharing your screen content with colleagues are found on the reverse side of these instructions.

Authorization levels:

ProCall is based on so-called authorization levels. By setting an authorization level for a contact, you are specifying the level of detail of information you share with them.
Example: Select, for example, "Private" if you would like to share private information and appointments, or "Public" if you only wish to share certain information, such as name, title, company and e-mail address with a contact.

Call journal:

Conversations are archived in a private journal. A variety of filters are available which allow you to refine the displayed entries for a better overview off all conversations. This is also where, for example, your notes on any given conversation are stored.

Group journal*:

Teams can be organized into so-called "Groups." All users of a given group have access to the journal entries of the other members; for example, they can read notes from their colleagues and thus optimally prepare for a meeting.

Contact-related journal:

A personalized journal containing all of the conversations with a respective contact can be found in a Favorite's "Contact details" - including conversations that other ProCall users have had with this contact.

Missed and planned calls:

The "Planned" tab provides an overview of your calling plan over the next few days, with date and time, telephone number, contact being called and saved notes, if any (e.g. conversation guidelines). Keep reading to learn how to plan a call.

The "Incomplete" tab is a filtered list of missed calls. It displays the date, time, telephone number and, if applicable, the contact assigned to a missed telephone call.

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Incoming call

ESTOS ProCall displays all conversations in a so-called conversation window. In the case of incoming calls, all available contact details for the conversation partner associated with the telephone number are displayed. Potential data sources include, for example, the company address book, your groupware
contacts (e.g. Microsoft Outlook, IBM Notes, Tobit David, LDAP data sources), a telephone book data source (e.g. Germany telephone directory), etc.
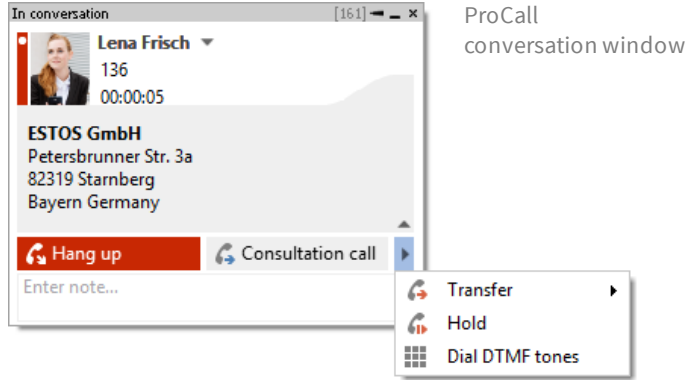
ProCall conversation window

- End call
- Hold call, initiate query
- Forward call under conversation
- Forward call before call take-over
- DTMF field for entering post-dial functions

Save conversation notes

Notes may be entered during and after a conversation. The data entered are automatically saved in the ProCall journal folder, where they are available for review at any time. This also applies to users of the group journal and their saved notes.

Creating new contacts

To capture a new contact, the telephone number or assigned contact data set (e.g. from a telephone book CD) transfers easily to the standard Microsoft Outlook, Lotus Notes or Tobit David form. Simply right-click in the conversation window on the displayed telephone number or assigned name.

Speed things up with hotkeys (F8 and F9)

F8 F9 Use hotkeys to quickly and easily take (F8) or end (F9) calls with the press of a button. If the standard hotkeys are already being used by another program, they may be individually configured in "Settings."

Outgoing call

Various basic options are available for placing an outgoing call:

- By entering the telephone number or contact directly into the search field
- By double clicking on the quick launch bar
- By right clicking on the contact in the context menu under Favorites and selecting the telephone number

Symbols in the ProCall Client

- Line
- Call forwarding
- Call protection
- Audio- and Video Devices
- Audio Device
- Calendar icon - free
- Calendar icon - busy
- Calendar icon - away
- Note of a contact
- Blocked contact

Planning a call

ProCall allows you to plan a call and track its status. Notes may be saved and reminders set for every planned call. You may plan calls by right clicking on a ProCall contact and selecting "Plan call."
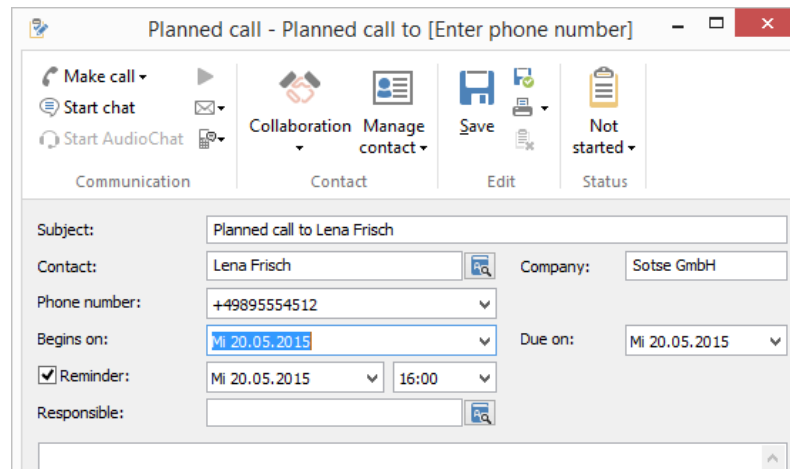
Instant messaging

ProCall allows you to communicate with your colleagues by instant message.
To do so, right click on the desired contact and select "Start chat."
The instant messaging window opens and you may enter your message. Optionally, you may start an audio or audio/video chat from this window.

ProCall chat window

Computer SmartPhone integration (CSPI) via Bluetooth

For the first time, ProCall 5 makes it possible to integrate a SmartPhone or classic mobile phone via Bluetooth. A SmartPhone/mobile phone with an existing connection is required, which must be activated in the ProCall Client settings. Optionally, the device address book and offline journal can be activated. The operation is not unlike the operation of a standard system telephone.

Adding a Federation contact (Favorite)

ProCall also makes it possible to add a contact to your Favorites outside of your company boundaries (via Federation). To do so, right click on the "Favorites" tab, select "Add contact," and enter the instant messaging address (SIP or XMPP) of your contact (e.g. max.mustermann@domain.de). More information about the topic of

ProCall Mobile*

ProCall is also available as an app for your smartphone (Apple and Android). Scan the QR code below to download the app directly.