User Guide – User Guide

Summer 2012 – v2.3

Contents

Welcome to Samsung Xchange

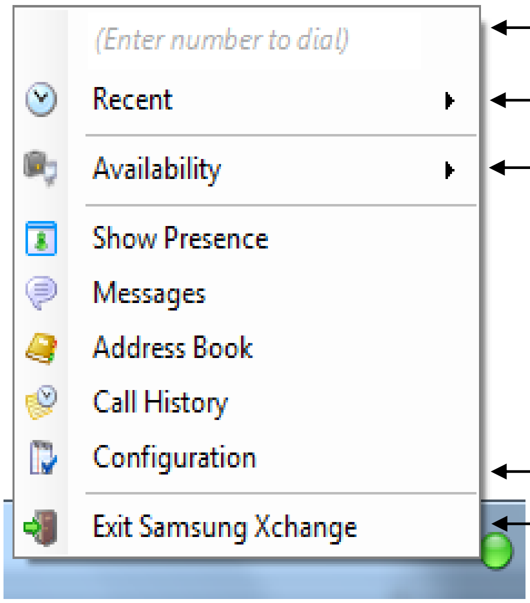
Samsung Xchange has been designed to make your phone easier and more convenient to use. It can do this in a number of ways and this document will show you how. But first, let's dispense with the formalities. Samsung Xchange is a bit of a mouthful, isn't it? So let's simply call it "Xchange" from now on.

Where is it?

Xchange is designed to be discrete. Always running and providing useful information as you need it, yet at the same time not annoying and interfering when you're trying to work. So, most of the time Xchange sits silently in your tray menu, waiting for you to click on it. Note: In Windows 7, some tray icons become hidden and expressly have to be shown. These settings are stored in the 'Notification Area Icons' part of the Windows Control Panel.

So go ahead and right-click on the Xchange icon, which is a green circle (or red if you're on a call) and the tray menu should appear.

Tray menu



Quick dial box: Type a number here and press Enter to make an immediate phone call.

Recent menu: Quickly see recently dialed numbers, and click to redial them.

Availability menu: Change your status as it appears to other users of the software. Can be automatically set if Outlook integration is enabled.

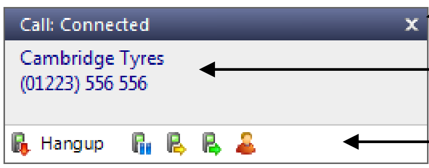
Configuration: Contains options to change your user experience, and configure CRM packages to integrate with.

Exit: Use this to unload the software.

Preview window

Make a call in to your extension again and the Preview window should appear. It contains much of the information about the call, but in a much more compact format. Plus it will disappear shortly after a call connects.

Let's review the main parts of the window:



Close button: Use this to make the Preview window disappear more immediately.
Contact information: The telephone number and name of the other party.
Call control actions: Use these to interact with the call. Using some of these will display the main Presence window.

The actions at the bottom of the Preview window adapt to the state of the call. The example picture shows the actions that are available when a connected call is in progress. To conserve space, the text is only shown for the first actions. The rest are depicted by their icons only.

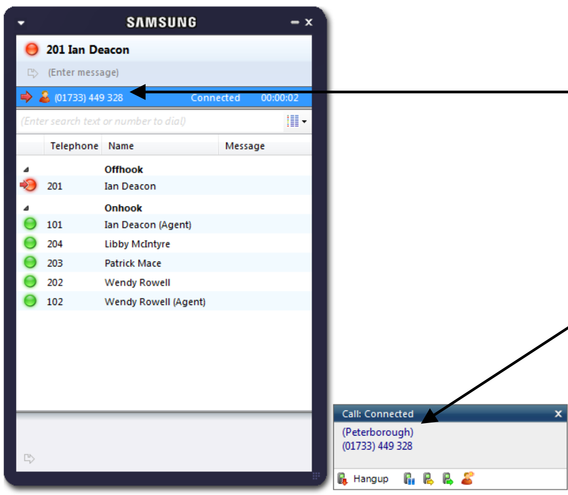
What would you like to do?

Are you still with us? Congratulations. Many people just go straight to the software and figure it out from there. But you know what? They're missing out. This is where we show you how to get the most from the software. Plus, it's presented in a topic-by-topic way, so you can read the sections that you're interested in first.

So what would you like to know? Have a look at the choices below. They are presented in a logical order based on the tray menu. They are not necessarily in order with the most interesting first, so feel free to skip over any that look dull:

Making calls	How many different ways can you make calls? Which are the best?
Call Control	How can you control calls from your PC? What is the best way to work?
Address books and contacts	How to assign names to callers and how best to use this information.
Call History	Taking a look at your call history and what you can do with it.

[Presence window]()	Publishing your availability and seeing if other people are free.
[Messaging]()	Chatting via the built-in instant messaging client and reviewing previous conversations.
[Settings and configuration]()	How do you configure Xchange to get the most out of it?

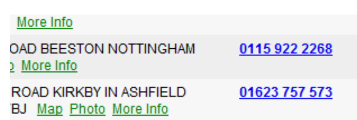


Want to know how to assign names to callers? Read **Address books and contacts**.

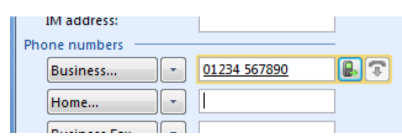
Want to know how to control calls? Read **Call control**.

Making calls

So, we're going to look at ways of making it easier to call people. But at the same time, we don't just want to use technology for the sake of it. So where do we start?



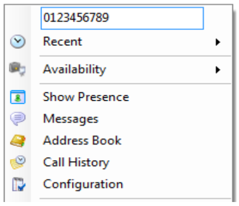
Well, the best way to do this is to look at the different ways that you might get the number that you're going to call, and then look at the best way to call them. For instance, you might be browsing the internet and see the telephone number of a company who you'd like to call. In this instance, the most natural thing would be to click on the number to dial them. We call that internet dialing (more about this later).



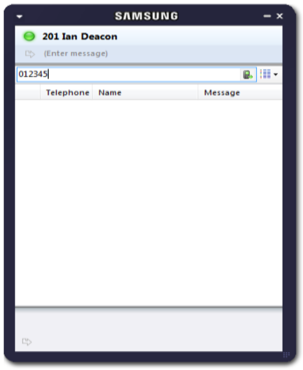
Or if you are using your company's Contacts Management program and you have a contact's details on screen, you don't want to have to lift your handset and dial the number by hand. There's a much easier way now.

So when you make calls, where do you get the numbers from? Let's look at some possibilities:

From a piece of paper



Well, you might as well lift your handset and dial the number on your telephone keypad. But if that's the case then you should think about storing the person's name in Xchange and then next time, you can find them more easily.



Alternatively, you could right click on the Xchange tray icon and then enter the number in the text box at the top. You can even use the backspace key if you type it wrong. Easy, eh?

Or, if you happen to have the Presence window open, then just start typing a number on your keyboard. Xchange will understand that you want to make a call and switch to the "Make call" screen. Press the Enter key when you've finished typing to make the call.

Someone you spoke to recently

If you spoke to them using the phone that Xchange is connected to then the call should be in your call history. At the main menu, press the call history button and you will get a list of your calls in reverse date order. If you see the caller in this list, then click on their telephone number to make a call to them directly from this screen.

Alternatively, if the person was one of the last ten people that you spoke to, then they will be in your "Recent" list. You can get to the Recent list from either the Xchange tray icon or from the Make call screen.
Note: these Recent numbers are stored on your PC not on the server.

From a web page

You can configure Xchange to search your web pages (Internet Explorer only) for telephone numbers to dial. It won't find all of them, unfortunately, but it is good at phone directory searches because it is optimized to understand this kind of page. To turn this functionality on, you need to go to the Configuration main menu option and then go into Dialing settings. Here you can turn on "Web Page Dialing".

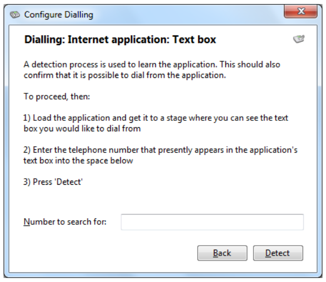
Some web pages, such as Contact Management systems may contain text boxes with telephone numbers in. These work slightly differently because we can't make these into hyperlinks. To add dialing support to this type of web page, then you will need to tell Xchange to search for them. This is also done from the Configuration screen. To add dialing support for the application, you need to follow a couple of simple steps:

i) In the Configuration screen, on the Dialing page, press the Add button. This will load the Dialing wizard.

ii) Select the Internet Explorer option, and then choose Text boxes.

iii) Locate a page in your application that contains telephone numbers in a text box. Enter the telephone number that is shown in your application into the wizard.

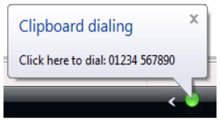
iv) Then press the Detect button. Xchange will then scan all open web pages and find the first instance of your number (you can only do one at a time). Press the Save button and in future (next time you refresh the page) it will add a Dial button next to the text box.



From another application

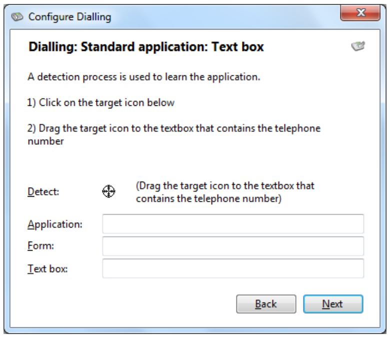
It is very common to store telephone numbers on a PC, particularly in contact management applications. However, applications actually vary a lot as to how these numbers are presented. This gives quite a challenge for applications such as Xchange to make dialing possible. Fortunately, we've been doing this kind of thing for a while and we've put some nice tools into Xchange to allow you to dial from other applications. The first and easiest of all of them is Clipboard dialing.

Clipboard dialing can be turned on in the Settings -> Dialing settings page. When on, Xchange will keep an eye on the clipboard and if you copy something to it that looks like a telephone number then a bubble will appear from the tray icon that asks you if you want to call the number.



When using this method of dialing, you may want to help Xchange know what is a valid number by entering a minimum and maximum length and possibly a prefix that numbers must start with. This can be done in the Dialing settings page.

If you regularly dial from a certain application then there may be a quicker way to dial. This involves a detection phase where Xchange learns your application, and is called **Application dialing**. To try it out, then go to the Dialing page in the Configuration.



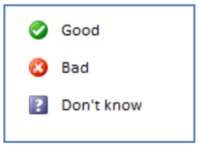
At this screen then press the Add button and you can try to detect your application. The way that you do this is as follows:

i) Select the "Any other type of Windows application" option, then press Next.

ii) On the next page, click and hold the mouse down on the crosshair next to the word "Detect" as in the screenshot above.

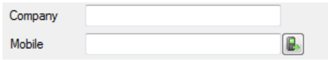
iii) Drag the mouse (without releasing the button) over the text box in your application when a number is stored.

iv) Release the mouse button when the mouse cursor is above the textbox. (This obviously means that you need to get Xchange and your application side-by-side to achieve this). If the crosshair icon changes to a check then it is likely that Xchange can add dialing support to this box.

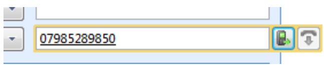


v) When you have finished then press the Next button and then press the Close button to save the settings. Then press Save in the main configuration page too.

Next, close and reopen your application window to see if it has worked. The results will depend on what type of application it is. You will either see one of three possibilities:



i) A dial button will appear to the right hand side of the text box. This means that you have a ".Net application". (You probably saw a check when doing the detection also). If this is the case, then you should proceed to "Detect" the other text boxes in your application to make them work also.



ii) Alternatively, try hovering your mouse above the text box (making sure that there is a valid telephone number in it). All being well, a Dial and Hangup button will appear to the right hand side of the text box. This means that you have a non-.Net application.

iii) If neither of these two things happen, then the text box probably isn't supported, so you should consider using the Clipboard method instead. Note: you might also be trying it with an web-based application, if so then have a look at the earlier section under dialing from a web page.

From your own in-house developed application or database.

We have to get a little "techie" here, so if you don't develop your own in-house applications, then feel free to skip straight past this.

So what kind of an application do you have?

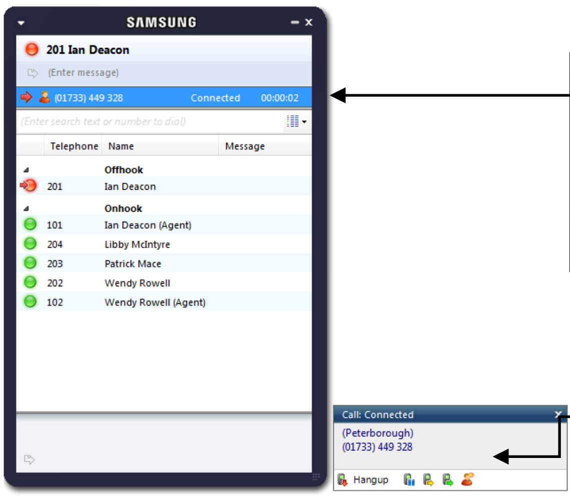
i) **Web-based**: If so, then we suggest that you put "Anchors" <A> around any telephone numbers. The href should be "Dial: 123" and replace 123 with your real number. If you want to put Dial buttons next to your input textboxes or under buttons, then we suggest that you use the window.OpenURL function and construct a string containing "dial: 123" as a parameter (changing the number to the correct one obviously).

ii) **Non-web based**: When you want to make an outbound phone call (ie by putting a Dial button next to a text box) then do so by running or shelling the PhoneHelper.exe program (found in the same directory as Xchange) with a command line parameter of "Dial(123)" (without the quotes).

So, that's it for dialing options. Unless you can think of any more…

Call Control

By now, you will probably have seen the call area at the top of the Presence window a number of times. It appears when you make or receive a call. Let's take a moment to review the items on the area.



Call information

The red or blue arrow In the left side indicates whether you are making or receiving a call.

The telephone number or name, if known, of the remote person appears next.

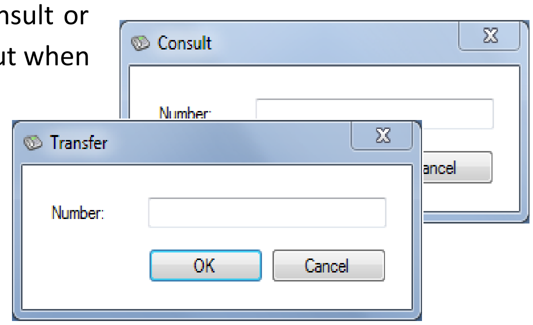
Then, the state of the call (ringing, connected, held, etc) is shown and finally the duration of the call.

The Preview window contains contact information, call state, and some buttons to perform call control.

As you can see Preview window allows you to interact with the current call in a number of ways. One of the most common ways is to click on the new contact or Edit contact button to apply a name to the person you are speaking to. This is covered in a later section, Address books.

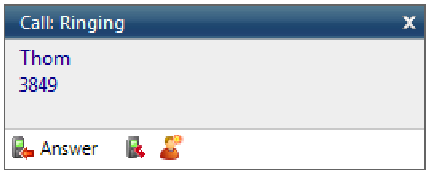
It is also common to use this screen to perform a transfer of the current call to another extension or user. To do this you must be connected to the call (as opposed to it being on Hold or Ringing). When you are connected then the Actions list looks like the above example. To transfer a call you do NOT press the Hold button. The Hold button has a different purpose (more about his later). Instead you either press the Consult or Transfer button. You choose the button according to whether you want to speak to the other person (Consult) or not (Transfer).

You are then presented with a screen, but with the word consult or Transfer at the top. Your call is not on hold at this stage yet, but when you are ready, type the number to transfer to (or choose one of the dialing options) and if you are Consulting then the original call will be put on Hold pending transfer (the pending transfer bit is important). If you are transferring then the call will be put straight through (remember to say goodbye first).



When you have finished talking to your colleague, you can either click Cancel to return to the original call or click Complete to transfer the original call to your colleague.

More call control



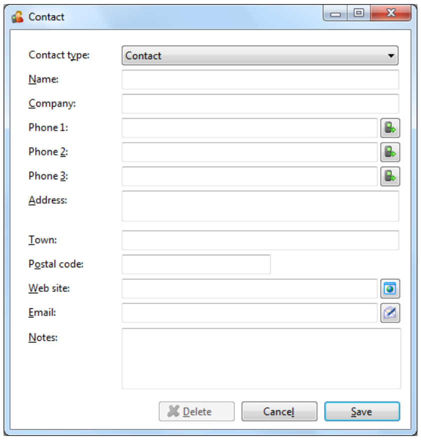
We've seen what you can do with a connected call. Can you interact with other calls? Yes, when a call is ringing, you can choose to answer the call or Deflect it (transfer it without answering it) to another extension. Deflecting a call is done a manner similar to transferring calls. If you want to use this feature, then why not go ahead and try it out now. Phone in from your mobile and see how it works and then you'll be ready if you need to deflect a call for real.

Deflecting calls is not just used to avoid work. If you are already on the phone and someone else phones you, then you can use Deflect productively to move the call to a colleague who can tell the caller to wait for you to become available.

You can also put calls on hold. Depending on your telephone system configuration, this means that the other person should hear music. When you are ready to talk to them again, use the Unhold button. Remember, the Hold button is not for transferring calls. It is purely to pause the call. If you want to transfer a call that is on hold, then first you will have to take the call off hold first.

Address books and contacts

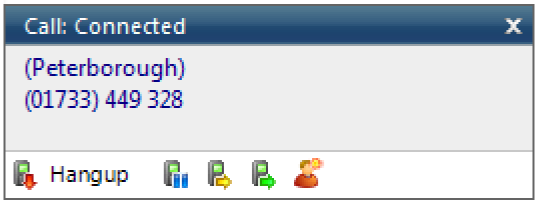
The Address book window is accessed from the Address book item on the main menu or tray menu icon. It provides access to a company-shared address book. Unless you're the first person to use the software at your company, then there are probably some entries already in there. Go ahead and have a look. Don't worry about filling in any of the boxes, just press the Search button at the top and see if there are any entries already there.



No, none in there? No problem, we'll add one now. If you did see some entries, we'll discuss the results page shortly. But first, we're going to add another entry.

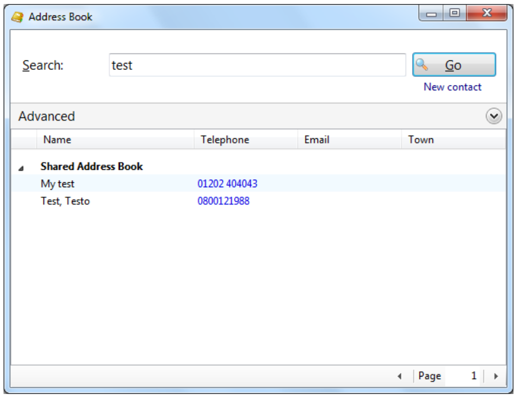
At the top of the window, press the New Contact button. This will present you with a blank Contact window. Enter a name, company and phone number in the relevant boxes. All of the boxes from the Contact window, including the Notes box at the bottom, can be searched. You can also interact with some of the boxes to make a call, send an email, etc.

You may be wondering what the Type box is for at the top of the page. This is used to change the format of the Contact window. Different "types" have different templates. Pick the one that best represents the contact entry that you are creating.



When you're finished press the Save button and we'll search for your new entry.

Back at the main Address book window; enter search criteria to find your entry. Most of the time, you can find the results that you want by entering text in the search box and pressing Go. However, if you get too many results back, you may want to consider further restricting your search by using the 'Advanced' section. Names and telephone numbers area searched using the original Search box, but in the Advanced section you can filter by address fields such as town or postal code (Where) or other fields (What) as well.



Press the Search button and after a short delay you'll be presented with a list of results. From this screen you can click on the telephone number of a contact to dial them, or click on their name to edit or view their contact details.

If you have enabled the Google integration in Xchange, you can search through Google's reference data right inside the Address Book and access the search results just as easily as any other integrated app.

Storing contact details when on a call

If you've made or received an external call using the Preview window, you've probably noticed that when Xchange doesn't know who the other party is that you're speaking to, then it will show a town or location name instead.

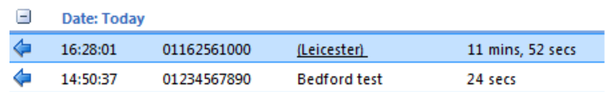
It does this in an effort to be helpful, but if you really want to help yourself, then you'll add a name to the contact for future use.

How do you do this? You press the 'New contact' button on the right hand side of the Preview window. (You already knew this, didn't you?)

You can then store the caller's details for future use.

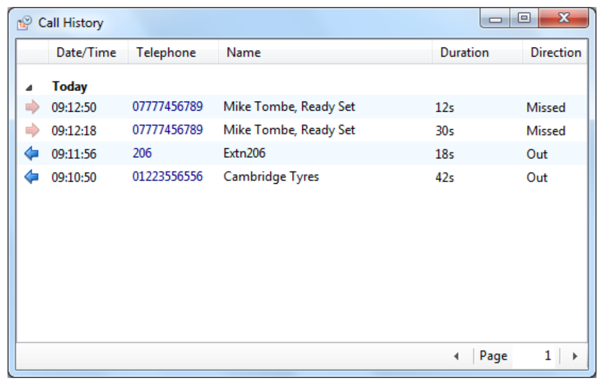
Adding contact details from the Call History window

You may find it easier to add a contact's name and other details after the call has ended. This is fine, you can concentrate better this way. To do this, go into your Call History and click on where the name would appear (it will be a location name in brackets instead). When you do this, the Create contact window will appear like before.



It's a good idea to have a look in your Call History, from time to time, and enter caller's details in this way. That way, when you're looking for someone's number, you will be able to find it.

Call History

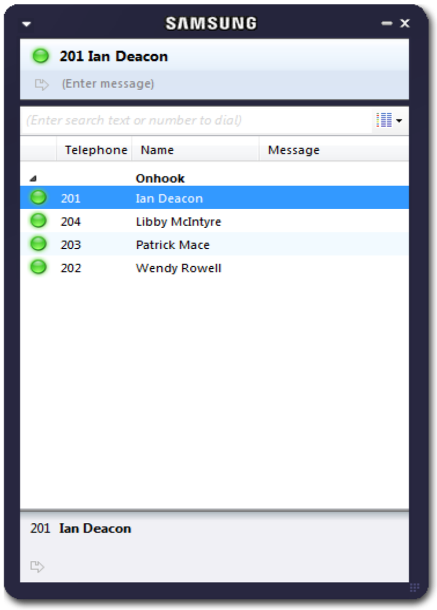


Once you've used Xchange for a while you will come to rely on the Call History. It's a great way to find the telephone number of someone who you spoke to recently. The Call History window is accessed from the Call History item on the Main menu or from the tray icon menu. As well as reviewing recent activity you can dial someone from here by clicking on their telephone number and you can access their contact record here by clicking on their name (we saw this in the Address Book section). It's good practice to store the names of people when you speak to them, especially if you're likely to speak to them again.

By default, the Call History screen returns the 50 most recent calls. The next 50 can be accessed by pressing the page right button in the bottom right of the window.

Also, to aid readability you can hide and show individual days from your history by pressing the expand/collapse button to the left of the date.

Presence



In its most basic form, the Presence window provides a quick way to check the availability of your colleagues. The Presence window is accessible from the tray menu. When you first install Xchange, then the Presence window should contain a list of all the extensions, unless your administrator has chosen a different arrangement.

If you click on one of the entries in the Presence list, then a context menu should appear. Assuming that you are not already on a call, then the menu should contain the Make call item. By choosing this action, you can then dial the extension directly.

If you had been on a call already, then the choices would have been Consult and Transfer in place of Make call. This is appropriate because, if you are already on a call, then the expectation is that you are clicking on the extension with a view to transferring the call to them.

What other actions can you perform? Well, if you see an extension that is flashing red then it means that the extension has a call ringing at it (you might be able to hear the phone if it's nearby). Click on the extension and the context menu will include an option to pick up the ringing call.

The other colors that you might see are on the Presence list are solid red, which means that the extension is engaged on a call, and fluttering yellow, which means that there is an held call at the extension; solid grey means the extension is offline.

If you want to personalize your Presence window to include just the contacts that you need, then you do this in the Presence settings page under the Settings menu (in the Presence window). The other styles that you can choose, instead of extensions, are Users or custom. The user list is for hotdesk oriented sites. These are sites where staffs move around and hence the list is oriented toward who is available and where they are, rather than which extension is available. In user mode, the Users are shown as colored "chess pawns" instead.

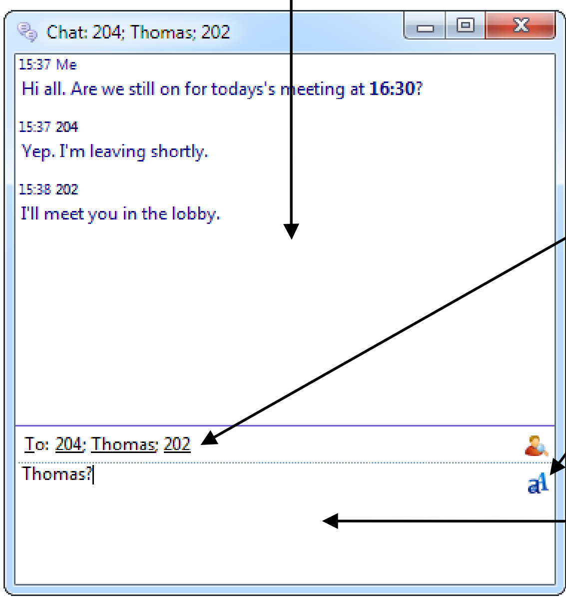
Clicking the Send Message option on the context menu will open the integrated chat window. Then you can send instant messages directly to that user or extension. Full information on messaging can be found in the Messaging chapter.

You can also right-click on an extension and select the Call History option to see their Call History. You need to have a security policy with sufficient rights to do so but you can use their Call History as easily as your own with all the functionality intact.

Messaging

Sometimes, calling a colleague isn't an option but you really need to get in touch with them, perhaps they are on an important call so you don't want to interrupt but have important relevant information. That's where Messaging steps in to help out. You can use the integrated chat window to communicate with them without tying up their line or having to interrupt a connected call.

To start a conversation, open the Presence window, then right-click on the extension or user you want to send a message to and click the Send Message option on the pop up context menu.



Conversation: All of the previous messages in the conversation are displayed here in chronological order. Just click on any hyperlinks to follow them.

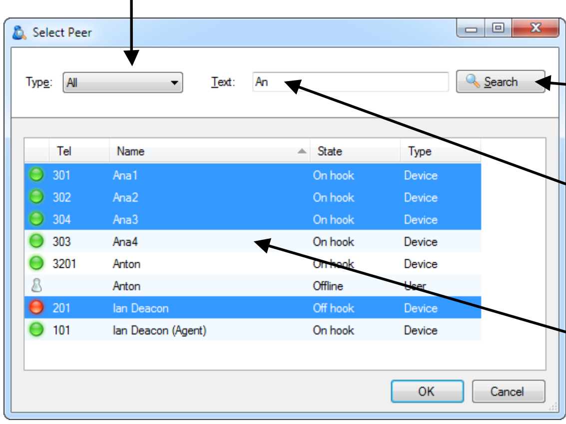
To box: Names/numbers of the message recipients are typed here or you can use the button at the end of the box to add them (see Select Peer). Multiple recipients should be separated with semi-colons (;).

Rich text: Select the input text to modify then select an option from this popup menu to apply an effect or select an option and then type.

Text input: Type your text here and press Enter to send your message. Hyperlinks can be typed or pasted and are formatted automatically

Select Peer

If you click the button at the end of the To box to add recipients, you'll see the Select Peer screen. It lists the different users, extensions and supported devices connected to the telephony system.



Type: Select which type of peer to display from All, Extension, All devices or User.

Search button: If you change the search text, click the Search button to update the list.

Search text: Enter the text to filter the search results by. To show every peer of the selected type just leaves this box blank.

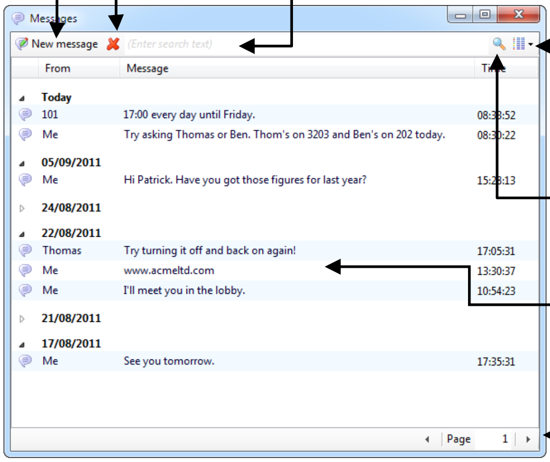
Peer results: The peers that have been found are displayed here. Select the peer to add and click

OK; multiple peers can be added simultaneously by holding down the Control key and clicking each peer in turn, then clicking OK.

When you have added a recipient, if their name or number appears in the To box with a line **under** it, the chat window has recognized it and your messages will be sent to this user or extension. If a name/number has a line **through** it, the chat window cannot deliver messages to it.

Message History

When you need to refer back to conversations you've had in the past, you can view the **Message History.** It's similar to the Call History except you can go back to the conversation and read every word.



New message: Click here to open a new chat window; you'll need to add all recipients manually though.

Delete message: Click on the message to delete, and then click this button. This cannot be undone so use with caution.

Search text: Enter the text to search for within the messages. Leave this blank to show every message.

List display options: Use the options in this menu to control what is displayed and how.

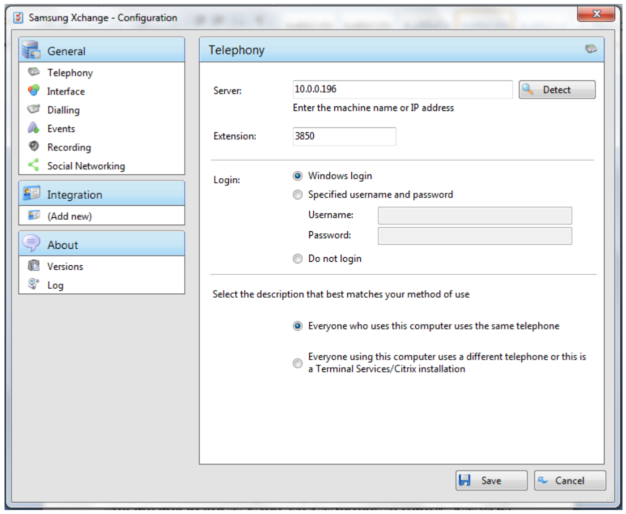
Search button: Click this to update the message list below when you change the search text.

Conversations: Click on a conversation to display it in a new chat window. You can continue a conversation once it's been reopened.

Page: Use the arrow buttons or type the page number you want to view into the box.

Settings and configuration

The Settings menu contains many options that you can change to improve your enjoyment of Xchange. Let's take a look at some of the more common ones. If you select the Configuration menu item from the tray menu then you are given a page with with options on the left hand side.



Telephony settings

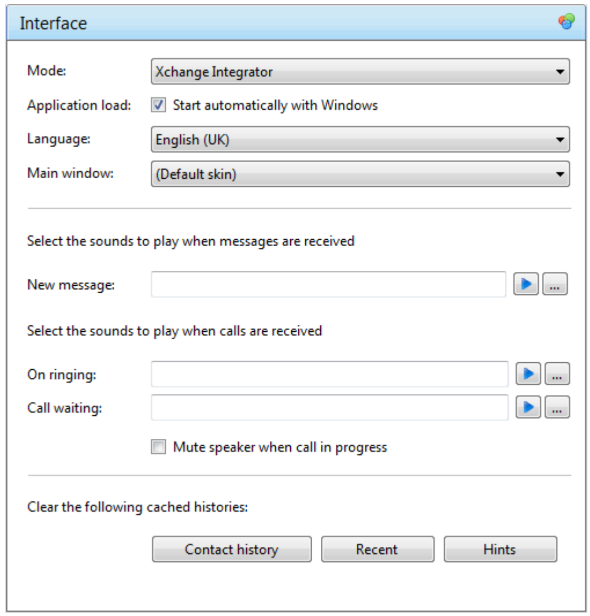
When you first install Xchange, it takes you through an installation phase where you need to tell it your telephony server's address and your extension number. When it does this, it presents the Telephony settings page of the Configuration window, so you may have seen these before. You're not that likely to change these settings, but you might as well know what they do.

The first option, Server, contains the details of your telephony server. The Extension option contains the local user's extension number.

The next choice, "method of use", is useful when several people share the same PC. Read the two choices and select which one best fits your mode of working.

The final choice is the User mode. This allows Xchange to support a number of different operations. Most users log in to their PC as a name (or username) that is the same, or similar to their own name. Or in other words, they log in as a name that uniquely identifies them. Xchange can take advantage of this to associate this user name with the extension that the user is logging in as. This behavior, of associating the user and the extension number, gives Xchange some powerful functionality such as "hotdesking" where other others can reach you, by name, even if you temporarily use another PC. If you like this functionality, but don't use "unique" usernames (i.e. you log into your PC as something like "user" or "technician") then you can still use it by manually declaring your username and password on the User tab. (Your administrator will have to create a user on the telephony server for you first). Finally, if you want to be completely anonymous as a user on your network, then you can choose not to log in. Be careful if you use this, though, because there are some features in the software that require a logged in user to work.

Interface settings



The Interface page allows you to change settings relating to the look and feel of the software, including actions that happen when calls take place.

To have the software start automatically when you log on to Windows, put a tick in the tickbox. The setting will take effect next time you log on to Windows.

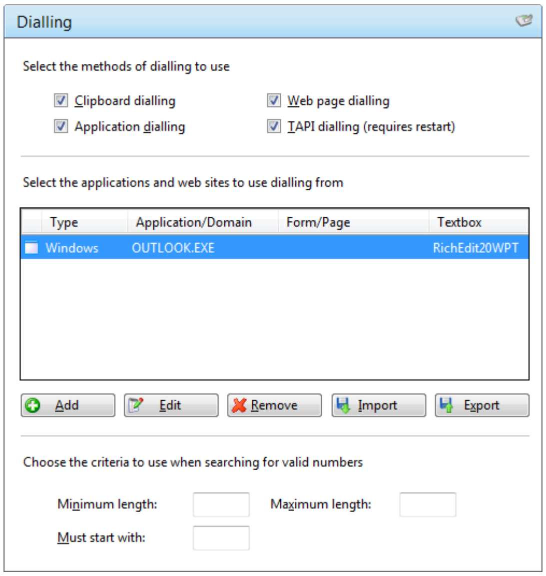
Language packs are available for the software to change the language of the user interface. By default, the software will attempt to automatically select the language to use based on the language setting of your operating system. However, you can change the language used by selecting from the Language dropdown list. If your language is not in the list, contact your reseller to find out when it will be available. Any changes you make to the language will take effect next time you start the software.

By default, many of the software's windows have a "skin" to make them look nice. Your reseller may have added their custom branding to the skin too. If you find that you don't like the "skinned" windows, perhaps for accessibility reasons, you can turn them off by selecting "No skin" from the Presence window dropdown. The next time you load the software, the windows will all be standard Windows-style windows using the theme from your operating system.

The next section on the Interface page allows you to choose a sound to have your computer play when your phone is ringing and/or you have a call waiting. This can help you to uniquely identify that it is your phone that is ringing and not a colleague's. You can also tick the box to have your computer's sound automatically muted whenever a call is in progress, which is useful if you listen to music or Internet radio while you work, giving you a more professional appearance.

The last section of the Interface page has buttons you can press to quickly and securely clear the history of contact history, recent numbers (as shown in the Recent list), and which hints the software has shown you (clearing hint history allows the software to show you the hints again).

Dialing settings

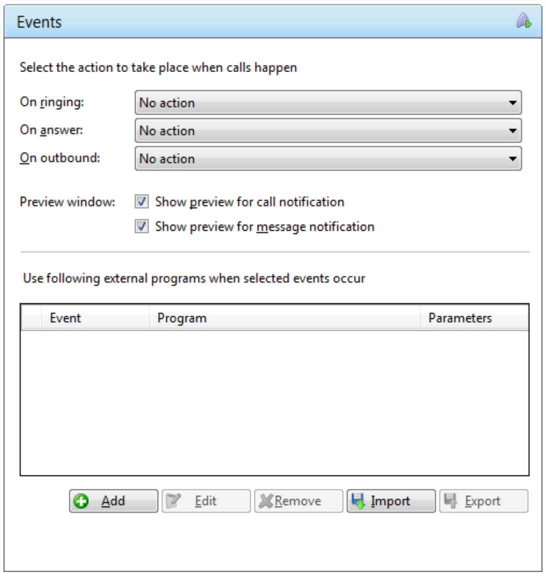


This page allows you to turn on and off dialing from all the different types of application that the software supports. As a review, the different methods of dialing are: Clipboard dialing (where you copy a telephone number to the clipboard and the software detects it), Web page dialing (where the software automatically scans web pages in Internet Explorer and converts anything that looks like a telephone number into a clickable hyperlink and adds new buttons next to telephone number fields that you have told it about), Application dialing (where the software adds new Dial buttons to applications that you have told it about), and TAPI dialing (where any application that supports Microsoft TAPI can dial through Samsung Xchange).

Any applications or webpages that you have told the software to add Dial buttons to appear in the table, click Add to launch the wizard (described earlier in this document) that allows you to add a new application to the table. You can use the Edit and Remove buttons to correct any mistakes you have made. If you have set up some applications that you dial from and are now moving PC, or want to give the settings to another user, you can use the Export button to export the dialing settings of the applications and webpages that you have set up and save them in a single file named “dial.settings”. If you have a “dial.settings” file and want to add the settings from it to your software, you use the Import button.

The last section on this page allows you to define what telephone numbers look like, to help the software more accurately determine whether a string of numbers it sees in a webpage or on the clipboard is really a telephone number or not. You can tell the software the minimum and maximum length of telephone numbers (anything outside the range will be disregarded as not a real telephone number), and you can also specify that telephone numbers must begin with a certain string of characters.

Events settings



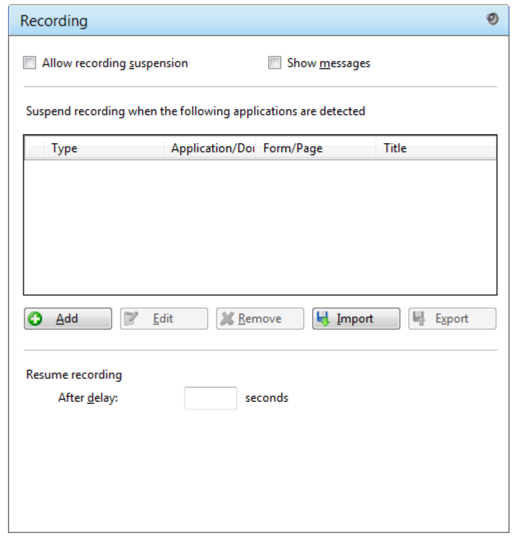
You can make the software either show the Presence window or pop the contact when certain events happen. Just select the relevant action from the relevant dropdown list: On ringing, On answer, or On outbound. You can also turn on or off the unobtrusive Preview window for all calls by ticking or clearing the box.

The software can also be configured to run one or more custom executable on selected events. To configure this, press the Add button and configure the following information: The Event list is used to select the event on which to run the program/application. The Direction list is used to select when it is either an incoming or an outgoing call. The Calls lists can be used to restrict events for internal/external or both.

The Parameters box allows you to either choose the “command line arguments” for the program, or in the case of a browser, the URL to load. When using a URL, make sure that you include the URI scheme (i.e. HTTP://). Then you can include in the Parameters any number of values from the call. For instance, to output the caller’s telephone number you can include %Call\CallerContact\Tel%. To use the telephone number of the remote party (as opposed to the caller, who may be the local user), you can use the syntax %Call\Contact\Tel%, or you can use %Call\Contact\DisplayTel% to get the formatted number.

To help testing, you can use the word Message Box in the Program entry, if you want to show a message box with the translated Parameter output. Finally a “custom” button can be added to the preview window allowing a user to control application popping in the same way as for standard integrated applications.

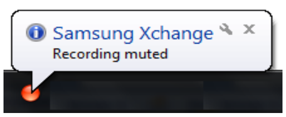
Recording settings



If you use voice recording, you can automate the suspension of recording by telling Xchange which applications are associated with increased privacy. For example, let's say that you accept credit card payments over the phone and you use an online payment portal to do so while speaking directly to the customer. You need to suspend the recording while the details are exchanged. Simply adding the online payment portal to the list on this page allows Xchange to recognize when it is opened; it can then automatically suspend the recording in progress. Furthermore, it can also detect when the same app is closed and automatically resume the paused recording for you.

For automatic suspension to occur, you must have ticked the **Allow recording suspension** tick box.

Xchange can let you know when recording has been suspended and resumed using notification bubbles that pop up above Xchange's tray icon. To turn them on or off, tick or clear the **Show messages** tick box.



To add an application to the list, click the **Add** button to start the Recording wizard. The wizard will guide you through the process of identifying your app whether it is an online portal, a standalone commercial program or one you've developed in-house.

Note: Additional hardware is required for voice recording.

You can edit existing apps' settings by selecting an app and clicking **Edit**. There are far too many possible values that could be encountered on the Edit screen that we can't cover them here so we would recommend NOT fiddling with them unless you know what they mean. To delete an app from the list, select it and click the **Remove** button. This cannot be undone unless the app's settings have been saved previously.

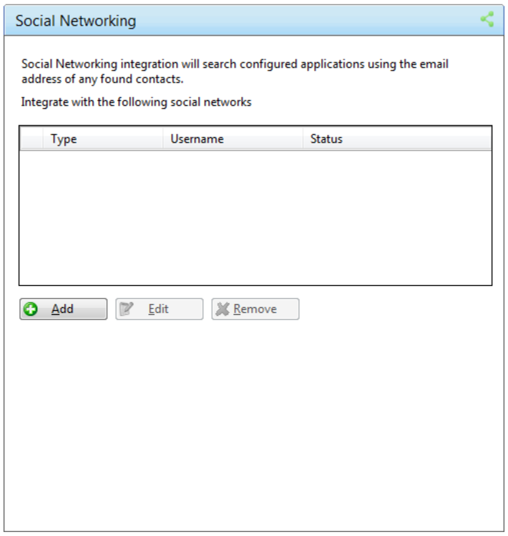
Saving your apps' settings is so quick and easy that there is no excuse not to. All you have to do is click **Export** and then select where to save the "recording.settings" file; we recommend keeping a copy locally on your PC as well as somewhere other than your PC (like a USB memory stick or by emailing it to yourself). This file contains the details for all of the applications and websites you have added to the list.

In the event of a disaster or if you need to set up Xchange on another computer, you can click **Import** and then select your previously exported "recording.settings" file to load your saved details back into Xchange. Click **Save** to apply the loaded settings and you are back up and running again.

If you enter a number into the **After delay** box, once a payment app or website has been closed, the recording will continue to be suspended for that number of seconds; leave blank for no additional delay.

Full instructions on setting up voice recording can be found in the **Voice Recording** technical guide.

Social Networking settings

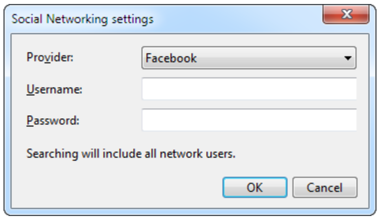


With so much social networking data floating around the internet, it seems a shame not to use it.

You can add your social networking account details for Facebook, MySpace, LinkedIn and Xing to Xchange. When you make or receive a call, if Xchange knows the other person's email address, it will search through your friends lists for MySpace, LinkedIn and Xing plus it will search through the **entire** Facebook member list. If it finds the other person, it will give you the opportunity to pop their page in whatever social networking site it found them just like if it finds them in your CRM app.

To add an account's details, click the **Add** button and the **Social Networking settings** screen will open.

Select the social network these account details are for e.g. Facebook, Xing etc. from the **Provider** dropdown box.



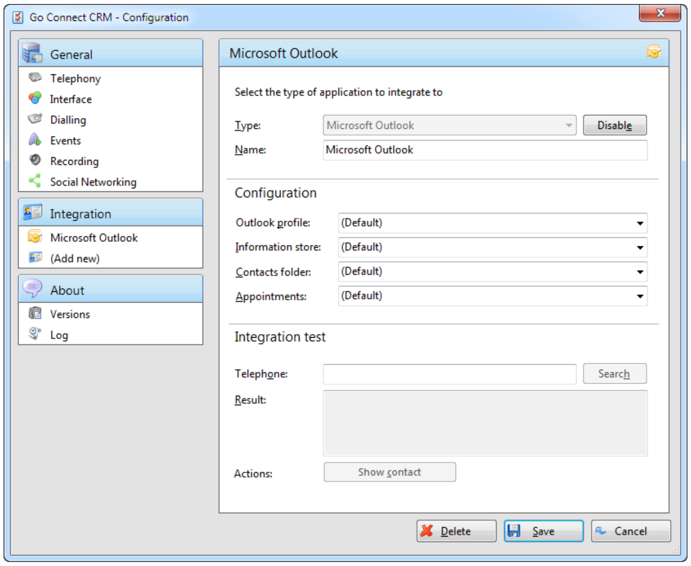
Enter your **Username** and **Password** into the text boxes and then click **OK** to add the details to the list.

If you ever need to modify an account's details, just select it in the list and click **Edit** to open the settings screen, modify what you need to and click **OK**.

You can delete an account from the list by selecting it and clicking **Remove**. This action cannot be undone so use with caution. Note: Deleting an account from this list does not delete the actual account with the social network, deleting it here just stops Xchange from using it to look up callers.

Click the **Save** button on the main configuration window to apply any changes you've made or click **Cancel** to discard any changes.

Integration settings



The Integration pages allow you to see and modify the databases that you have set up integration with. Integration means the database will be searched when calls happen to convert telephone numbers into names; and the database will be searchable manually from the Address Book window; and contacts that are found in the database can be "popped".

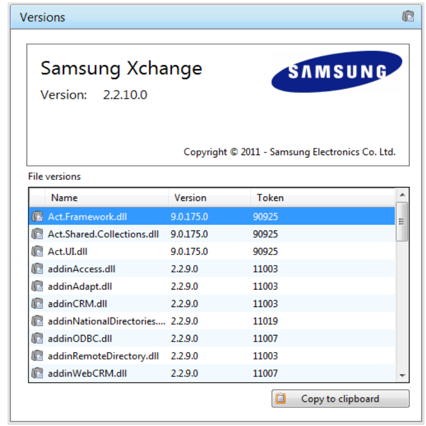
To make a new integration, click the (Add new) item, select the type of database from the dropdown list, and click Set (the first time you enter this screen you may have to wait a few seconds as the software scans to find out what integrations are available).

To modify an existing database that you have set up, click its name in the list. You can also click its name and then click Delete if you no longer want integration to that database.

For applications like Outlook, the software attempts to find and use default settings that will "just work" for you, so you won't need to do anything more. For more complicated databases, the software will do as much as it can for you, but you may need to help it by for example entering your password, or telling it where the database files are, etc.

The Integration test area allows you to test the settings you have entered by entering a telephone number and seeing if the software can find it. If the number is found, you can click the Show contact button to make sure that "popping" works.

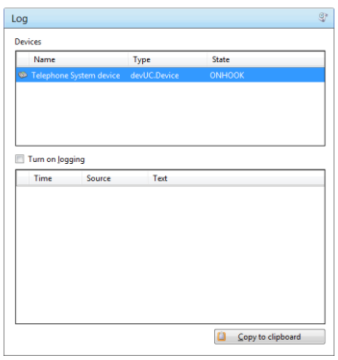
When you are done, click Save. The new integration will be available immediately.



Versions & Log settings

The chances are you will never need to look at these pages but it is best you know what they are for, just in case.

Most software these days consists of several small programs and libraries that form a whole and Xchange is no different. The **Versions** page lists the version used for each component part that makes up Samsung Xchange. This information can be used to track down any rogue element that perhaps hasn't updated correctly or to provide clues to a problem's cause. Should something like that happen you could click the **Copy to clipboard** button and then paste the info straight into a document or email.



The Log page performs a similar function in that it displays information that is useful in the event of a problem.

The **Devices** list shows the devices that are being used; this could include hardware and any apps that you have integrated with Xchange.

The panel below shows the **Log** entries. By default, logging is turned off but you can turn it on by ticking the **Turn on logging** tick box. Once enabled, the log keeps a record of what Xchange attempts to do and whether it was successful or not. This information can be very useful when troubleshooting an issue; click the **Copy to clipboard** button and paste the info into a document.