START GUIDE





INTRODUCTION

About this guide

This guide is designed to take you through the TalkSwitch installation and configuration in an easy-to-follow 8 step process. Once set up, your system can easily be configured to add or change extensions, or to increase system capacity.

Who should use this guide

This guide is intended for use with a TalkSwitch 24-CA, TalkSwitch 48-CA, or 48-CVA system (of single or multiple units).

Where to go for further information

The guides listed below, and other guides, can be found on the TalkSwitch software CD, in the TalkSwitch folder in the Windows Start menu once the software has been installed, and in the support section of our website at www.talkswitch.com/support.

- For advanced configuration instructions, refer to the *TalkSwitch User Guide* after completing the steps in this quide.
- For information on setting up a TalkSwitch 48-CVA system to use VoIP, refer to the TalkSwitch VoIP Configuration Guide for Multi-location Networks.
- For information on configuring your system remotely, refer to the Remote Configuration Quick Guide.

Troubleshooting

The TalkSwitch system and the configuration software are designed for ease of use. However, if you encounter difficulties with the installation or configuration of your TalkSwitch:

- Consult the documents on the TalkSwitch software CD or in the TalkSwitch folder on your PC.
- Access additional TalkSwitch information online, including FAQs and Quick Guides, at www.talkswitch.com/support.

Contacting TalkSwitch Technical Support

- Contact your reseller.
- Email **support@talkswitch.com**, providing your company name and TalkSwitch product information.
- Call our support line at 1-866-393-9960 (toll free in continental North America) or at (613) 725-2466, Monday to Friday from 9:00 am to 5:00 pm EST.

BEFORE YOU BEGIN

Check package contents:

Whether you have purchased a system with one or multiple TalkSwitch units, each package you receive should include the following:

- TalkSwitch unit
- TalkSwitch Configuration Software CD
- AC Adapter
- RJ-11 telephone cables (4 for 48-CA and 48-CVA; 2 for 24-CA)
- RJ-45 Ethernet cable (for 48-CA and 48-CVA) or USB cable (for 24-CA)
- Quick Reference Cards (8 for 48-CA and 48-CVA; 4 for 24-CA)
- Wall mounting template, screws and anchors for optional wall-mounting your TalkSwitch unit.



Ensure that you have the minimum system requirements

You will need a PC to configure your TalkSwitch. Ensure that your PC meets the following minimum system requirements:

- Windows 2000/ XP operating system
- 120 MB free hard disk space
- 128 MB RAM
- 800x600 video resolution

Network equipment: If your system includes multiple TalkSwitch 48 units, you will need an Ethernet switch. If you plan on using VoIP or configuring your system remotely, you will need an Ethernet switch (or router with an integrated switch) and a broadband Internet connection.

Check your premises telephone wiring

TalkSwitch usually doesn't require any extra telephone wiring beyond the standard infrastructure in most commercial and residential buildings. If your premises requires additional wiring, refer to the *Home/Office Wiring* Quick Guide or consult an Authorized TalkSwitch Reseller in your area.



Important! Lightning and electrical surges can cause damage to the TalkSwitch unit. We recommend using surge protection equipment on all external telephone and power lines connected to this device.

STEP 1 - INSTALL THE TALKSWITCH SOFTWARE

- Turn your computer on, and insert the CD into the CD-ROM drive.
- The Install main window will appear within 20 seconds. Click INSTALL and follow the instructions.

Note: If you are using Windows XP or 2000, ensure that you have Administrator privileges.

If the installation program does not automatically start (for example, if Autorun is disabled on your PC):

- 1. From the desktop, double-click the My Computer icon.
- 2. Double-click on the CD drive labeled TalkSwitch.
- 3. Double-click on **setup.exe** located in the start folder.
- 4. Click Install and follow the instructions.



STEP 2 - CONNECT TALKSWITCH TO YOUR PC OR NETWORK

TalkSwitch can be set up anywhere in the vicinity of your incoming phone lines and computing equipment.

- TalkSwitch 48-CA and 48-CVA can be connected using a Local Area Network (LAN),
 USB, or serial* (RS-232) connection.
- The TalkSwitch 24-CA can be connected using a USB or serial* connection.

If you're installing a TalkSwitch system with multiple TalkSwitch 48-CA and/or 48-CVA units or you're adding a TalkSwitch unit to an existing system, refer to the *Networking TalkSwitch on a LAN* section on page 14.

Connect TalkSwitch to your PC or network

LAN (Ethernet) option: Connect one end of the provided RJ-45 Ethernet cable to the LAN port at the back of the TalkSwitch 48-CA or 48-CVA unit and the other end directly to your Ethernet switch. Ensure your computer is connected to the same switch.

USB option: Connect one end of a USB cable to the USB port at the back of the TalkSwitch unit and the other end to the USB port of your PC.

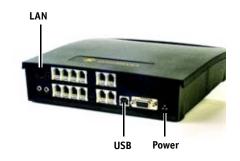
Power up TalkSwitch

 Connect the provided AC Adapter to the Power port at the back of the TalkSwitch unit and plug the adapter into an available power outlet.



Warning! Never use a power adapter other than the one provided with TalkSwitch.

 Turn TalkSwitch on by pressing the Power button on the front of the unit. The lights on the front panel will flash for a few moments during boot-up, then stop. The center light marked Data will remain lit, indicating that the TalkSwitch unit is on.





* Serial cables are not provided with TalkSwitch systems.

STEP 3 - OPEN THE TALKSWITCH CONFIGURATION SOFTWARE

Double-click the **TalkSwitch** icon on your Desktop (this icon was created during the software installation), or from the **Start** menu, select **Programs**, select the **TalkSwitch 3.21** folder, and click **TalkSwitch Configuration 3.21**.

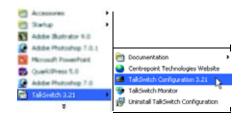
LAN connection

A progress bar appears on the screen showing the connection to TalkSwitch in progress. When the bar disappears, the TalkSwitch System Configuration window will appear.

USB connection

A dialog box opens requesting you to select the connection type. Select **USB** connection from the drop-down list and click **Connect...** A progress bar appears on the screen showing the connection in progress. When the bar disappears, the **TalkSwitch System Configuration** window will appear.

Note: If you encounter difficulties opening the TalkSwitch configuration software, check that all your wires and plugs are securely connected.







STEP 4 – CONFIGURE AN AUTOMATED ATTENDANT

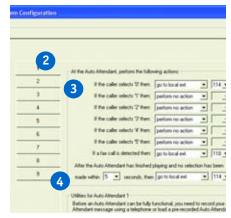
An Auto Attendants can be set up to answer incoming calls and play a recorded greeting. For example, an Auto Attendant greeting can instruct callers to dial their party's extension or dial '0' for assistance.

If you do not wish to set up an Auto Attendant at this time, you can proceed to the Step 5 — Configure Incoming Telephone Lines.

Set up an Auto Attendant

- In the TalkSwitch System Configuration window, select Call Handling and then Auto Attendant from the menu at the left of the window.
- In the main panel of the window, click 1 to configure Auto Attendant number 1 (default selection).
 Additional Auto Attendants (up to 9) can be set up later using the same procedure.
- 3. From the drop-down lists next to If the caller selects "0" then:, select go to local ext., and then 114.
 - We recommend assigning extension 114 to your office receptionist (or person assigned to answer general calls); extension 114 is designed to continue operating in the event of a power failure.
 - If your office has other directory options (for example, dial 1 for sales), you can set these now.
- 4. For callers that do not have a touchtone phone, go to the section: After the Auto Attendant has finished playing and no selection has been made. From the drop-down lists select the number of seconds to wait (for example, 5), select go to local ext., and select the receptionist's extension (for example, 114).





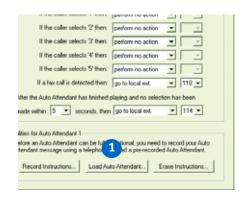
Set up an Auto Attendant greeting

You can load a professionally pre-recorded greeting to TalkSwitch now or you can record your own Auto Attendant greeting after connecting your telephones to TalkSwitch. Recording an Auto Attendant greeting is described in Step 8 of this quide — Record Auto Attendant and Voicemail Greetings.

To load a pre-recorded Auto Attendant greeting:

- 1. Click on Load Auto Attendant...
- An information box opens asking whether or not to continue. Click Yes and follow the instructions.
 The file must be an 8khz, 8-bit, mono, μ-law .wav file.
 A sample greeting (Auto Attendant Sample.wav) is provided in your TalkSwitch folder.

For more information: For complete details and options, such as Automatic Fax Detection, refer to the *Creating an Auto Attendant* and *Detecting and Routing Faxes* Quick Guides.



STEP 5 – CONFIGURE INCOMING TELEPHONE LINES

Setting up your incoming lines will customize TalkSwitch to fit the unique needs of your business. For example, you can set all incoming calls to be answered by an Auto Attendant, set certain extensions to ring before an Auto Attendant answers, or have calls go directly to voicemail.

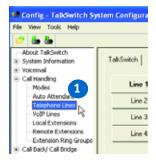
If you have not set up an Auto Attendant, proceed to the *Set certain extensions to ring or direct calls to voicemail* section on the next page.

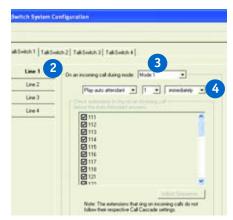
Set Auto Attendant to answer all incoming calls

- Select Call Handling and then Telephone Lines from the menu on the left of the TalkSwitch System Configuration window.
- From the list of telephone lines, click Line 1 to configure incoming line number 1.
- From the drop-down list next to On an incoming call during mode:, select Mode 1.

Modes represent different operating schedules, such as standard business operating hours or non-standard (weekends and evenings). Additional modes can be configured later.

- From the drop-down lists, select Play auto attendant, select 1, and select immediately.
 - Auto Attendant 1 will immediately answer all incoming calls and play a greeting.
- For TalkSwitch 24-CA, repeat this process for Line 2.
 For TalkSwitch 48-CA and 48-CVA, repeat this process for Lines 2, 3, and 4.
- If you have a system with multiple TalkSwitch units, you will notice up to four tabs (TalkSwitch 1, TalkSwitch 2, etc.) across the top of the window. Click on each tab to configure each TalkSwitch unit in your network.





Set certain extensions to ring or direct calls to voicemail

Option 1

To have certain extensions ring without playing an Auto Attendant, select **Ring extensions only**. Select the extensions to ring from the list of extensions.

Note: you can adjust the ring sequence by clicking Adjust Sequence...

Option 2

To have certain extensions ring before the Auto Attendant is played, select **Play auto attendant**. Select the Auto Attendant to play (for example, 1), select the number of rings (for example, **after 3 rings**), and select the extensions to ring from the list (by default they are all selected).

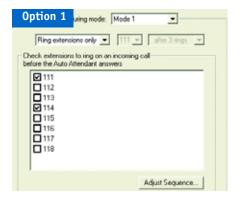
Note: you can adjust the ring sequence by clicking **Adjust Sequence...**

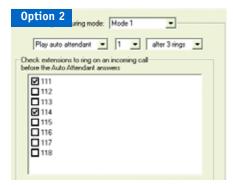
Option 3

To have all incoming calls directed to voicemail, select **Go to voice mailbox**, select the mailbox number (for example, 111), and the number of rings (for example, **after 3 rings**).

For TalkSwitch 24-CA, repeat the process described in the options above for Line 2. For TalkSwitch 48-CA and 48-CVA, repeat the process for Lines 2, 3, and 4.

If you have a system with multiple TalkSwitch 48 units, click on each tab (TalkSwitch 1, TalkSwitch 2, etc.) to configure all TalkSwitch units in a network.







STEP 6 - SAVE SETTINGS TO TALKSWITCH

This step will transfer the settings you have configured from your computer to the TalkSwitch system.

From the **File** menu in the **TalkSwitch System Configuration** window, select **Save to TalkSwitch...** A progress bar appears indicating that the configuration information is being sent to the TalkSwitch system.

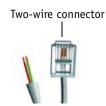


STEP 7 – CONNECT TELEPHONES AND PERIPHERALS

Connect incoming (external) telephone lines



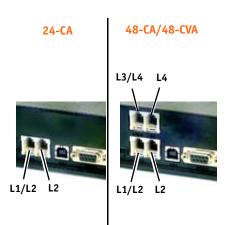
Important! Lightning and electrical surges can cause damage to TalkSwitch. We recommend using surge protection equipment on all external telephone and power lines connected to a TalkSwitch system.



Single line connection (1 incoming phone line per wall phone jack)

Use the RJ-11 telephone cables provided to connect external phone lines to TalkSwitch. These cables have a two-wire connector for connection to a single line wall jack.

- Connect one end of the provided RJ-11 telephone cable to the wall phone jack of an incoming phone line and the other end to the L1/L2 jack at the back of the TalkSwitch unit.
- If necessary, connect a second external phone line to the L2 jack of the TalkSwitch unit using the same method.
- If you have a TalkSwitch 48-CA or 48-CVA, connect the remaining external phone lines to the L3/L4 and L4 jacks at the back of the TalkSwitch unit, respectively.



Dual line connection (2 incoming phone lines per wall phone jack)

Four-wire connector

Use four-wire RJ-11 telephone cables to connect external phone lines to TalkSwitch. These cables are not provided with the TalkSwitch unit.

- Connect one end of a four-wire RJ-11 telephone cable to the wall phone jack of the incoming phone lines and the other end to the L1/L2 jack of the TalkSwitch unit.
- For TalkSwitch 48-CA and 48-CVA, connect another dual external phone line to the L3/L4 jack of the TalkSwitch unit using the same method.

Note: It is important that dual phone lines are connected to the L1/L2 and L3/L4 jacks, otherwise TalkSwitch will not recognize these lines as two separate lines.

24-CA

48-CA/48-CVA

L3/L4





Connect telephones and fax machines to TalkSwitch

For **TalkSwitch 24-CA**, connect the telephone cables from your phones to the E1 through E4 jacks of the TalkSwitch unit, consecutively. If you have a fax, connect the phone cable from your fax to the E3 jack.

For **TalkSwitch 48-CA and 48-CVA**, connect the telephone cables from your phones to the E1 through E8 jacks of the TalkSwitch unit(s). If you have a fax, connect the phone cable from your fax to the E8 jack.

24-CA

L1/L2

48-CA/48-CVA





Take note of which telephone is connected to which jack and refer to the table below for corresponding extension numbers. For systems with multiple TalkSwitch 48 units, refer to the *Networking TalkSwitch on a LAN* section on page 14 for further details.

	TalkSwitch 48-CA and 48-CVA								
	TalkSwitch 24-CA								
TalkSwitch Phone Jack	E1	E2	E3	E4	E5	E6	E7	E8	
Extension number (single unit systems; unit ID = 1)	111	112	113	114	115	116	117	118	

Connect an audio source (optional)

To play music while on hold, connect a 1/8" (3.5mm) mono phono connector cable from an audio source such as a CD player, tape player, or sound card to the **MUSIC** jack of the TalkSwitch unit.

If you have a system with multiple TalkSwitch units, you will need to provide audio to the MUSIC jacks of each unit.



STEP 8 - RECORD AUTO ATTENDANT AND VOICEMAIL GREETINGS

If you have not loaded a pre-recorded Auto Attendant greeting, as described in Step 4 of this guide — *Configure an Automated Attendant*, then you should record a greeting now.

What should an Auto Attendant say?

The following is an example of a typical Auto Attendant greeting:

"Welcome to the ABC company. If you know your party's three-digit extension you may dial it now. To reach reception, press '0' or stay on the line."

Record an Auto Attendant greeting

To record an Auto Attendant greeting for Auto Attendant 1:

- 1. Pick up any telephone connected to the TalkSwitch. You should hear a dial tone.
- 2. Press # then 4 1 #
- 3. Follow the prompts to record your message.

Set up and record voicemail

To set a password, record a personal greeting, and record your name for the company directory:

- 1. Pick up any telephone connected to TalkSwitch. You should hear a dial tone.
- Dial and your mailbox number. Your mailbox number is equivalent to your extension number.
- Follow the prompts to set a password, record a personal greeting, and record your name for the company directory.

NETWORKING TALKSWITCH ON A LAN

Up to four TalkSwitch 48-CA and/or 48-CVA units can be networked together over a LAN to increase the number of lines and extensions in your system. For further details on networking multiple TalkSwitch units, refer to the *Networking TalkSwitch* Quick Guide.

Connect TalkSwitch units

Use LAN cables to connect each TalkSwitch to your Ethernet switch.



Note: TalkSwitch unit enclosures are not designed for stacking. We recommend wall-mounting units in a horizontal row to maximize airflow and keep the units from overheating.

Power up all TalkSwitch units

- 1. Connect the provided AC Adapters to the Power ports of each TalkSwitch unit and plug each adapter into an available power outlet.
- 2. Turn the TalkSwitch units on by pressing the Power button on the front of each unit.

Change TalkSwitch unit ID numbers

Each TalkSwitch unit is identified by a unique unit ID number. Unit ID numbers help identify the extensions and voice mailboxes associated with each unit. For example, the first extension on unit 1 is 111. On unit 2, it's 121, on unit 3 it's 131, and so on. Refer to the following table:

	Unit ID 1	Unit ID 2	Unit ID 3	Unit ID 4	
Local Extensions	111-118	121-128	131-138	141-148	
Local Mailboxes	111-118	121-128	131-138	141-148	_

Each TalkSwitch unit is pre-programmed at the factory with Unit ID number 1. When you plug multiple units in for the first time or add a unit or units to an existing network, the lights on the front of each TalkSwitch flash. This is an indication that all units have the same ID number. Change the ID numbers so that they are all unique, as follows:

- 1. Connect a phone to any extension jack of the TalkSwitch unit for which you want to change the unit ID number, and lift the phone handset.
- The TalkSwitch prompt will indicate that there is an ID conflict. Choose a number, for example "2", as the new unit ID number. Once the unit ID number has been accepted, the lights on the front panel will stop flashing (usually within 10 seconds).
- Repeat the above steps for each additional TalkSwitch unit, assigning a unique ID number to each unit on the network.

What next? Now that you have connected your TalkSwitch units and changed the unit ID numbers, you can configure call handling options for TalkSwitch. Return to Step 3 — Open the TalkSwitch Configuration Software and follow the remaining steps described in this guide.

SETUP COMPLETE

Congratulations!

You have successfully set up your TalkSwitch system and are ready to accept incoming calls. The Quick Reference Cards provided with TalkSwitch should be given to each employee in order that they know how to use the TalkSwitch features.

Configuring TalkSwitch 48-CA and 48-CVA remotely

Once installation is complete, you can configure your TalkSwitch 48-CA or 48-CVA via a TCP/IP connection between TalkSwitch and a remote PC running the TalkSwitch configuration software. For details, refer to the *TalkSwitch Remote Configuration* Quick Guide.

Note: If TalkSwitch is installed behind a router/firewall, you will need to map port 9393 to TalkSwitch to enable remote configuration (for details on port mapping, visit http://www.portforward.com/routers.htm).

What next

- For advanced configuration and complete information on TalkSwitch features, refer to the TalkSwitch User Guide.
- To add remote extensions to your TalkSwitch system, refer to the Adding Remote Extensions Quick Guide.
- To configure your TalkSwitch 48-CVA (or upgraded 48-CA) system to use VoIP, refer to the *TalkSwitch VoIP Configuration Guide for Multi-location Networks*.

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