Before installing the CTI Desktop Toolbar, the CTI Desktop Server application must be installed and integrated to the phone system.

Your PC must meet the following requirements to use CTI Desktop 4.0:
- Microsoft® Windows XP, Windows Vista, or Windows 7
- A network connection to a suitable Unified Communications (UC) Appliance server.

To use the address book lookup facility requires one of the following:
- Microsoft Outlook 98 or higher
- Connection to a suitable LDAP/ADEX server

### Desktop Toolbar Installation

To install the CTI Desktop toolbar, you must download the CTIDesktopSetup.exe from the UC appliance and follow the onscreen instructions.

1. Open your Windows browser and enter: http://<IP Address of UC Appliance Server>/CTIDesktopToolbar
2. Click CTI DesktopSetup.exe.
3. Click Run to run the executable
4. Select the language you want CTI Desktop to display in, and then click OK.
5. The Setup – CTI Desktop wizard opens. Click Next.
6. Under Update Options, select ‘Allow any user to perform software updates’ Click Next.
7. The Select Destination Location screen displays. Accept the default and Click Next.
8. The Select Start Menu Folder screen displays. Accept the default and Click Next.
9. The Select Additional Tasks screen displays.
   a. Check Create a desktop icon to create a shortcut on your desktop to CTI Desktop.
   b. Check Create a Quick Launch icon to create a shortcut in the Windows Quick Launch toolbar. Click Next.
10. The Ready to Install screen displays. Click Install.
11. The Setup Wizard screen displays.
   a. Check Launch CTI Desktop to start the application after the setup process is completed.
   b. Click Finish.

### Running CTI Desktop for the First Time

The first time you launch the application, you must connect to your dealership’s UC Appliance server.

#### Logging in the First Time

Double-click the CTI Desktop shortcut icon or click the Windows® Start button and select Programs > ADP > CTI Desktop > CTI Desktop. Enter the following values in the dialog fields:
1. **Server**: Enter the UC Appliance server’s IP address.
2. **Port**: Accept default port : 11717
3. **Password**: Enter: password
4. **Organization**: Enter: <Enterprise Name>
5. Click Refresh to connect to the server.
6. **Login**: A dropdown list of Users displays in the Login field after the Refresh button is clicked – select the User from the list.
7. Check whether you want CTI Desktop to startup when booting up your PC.
8. Click OK.
### Verifying Connectivity

Once configured properly, the toolbar will display your name, extension number, and current status.

| Test User: 1234 | Available |

If an error occurs connecting to the UC Appliance server (such as an incorrect IP address), or you supplied incorrect login credentials, the info bar displays an error message.

| Invalid user name or organisation name, re-enter your details a... |

To correct the error, click the dropdown arrow next to the **Status** button and select **Connect**.

Once connected to the UC Appliance server, you can start using the application to make and receive calls and use click-to-call and screen pops when using ADP CRM or ADP Drive.

### Configuring Options

Click on the Options Menu in the Toolbar to configure preferences on the following tabs: Display, Call Popup, Address Book, Status, Keyboard, Update and Advanced.

#### Display Tab

Accept the defaults on this page unless you want to customize the following:

- **Language Selection**
- **Toolbar location**
  - Dock to the top of the screen
  - Dock to the bottom of the screen
  - Float – can move around the screen
- **Buttons displayed on the toolbar**

#### Call Popup Tab

Accept the defaults on this page unless you want to customize screen pop behavior.

Note: Make sure you have at least one extension checked for receiving Screen Pops by clicking Options, selecting the Call Popup tab, and verifying a line is checked.
Address Book Tab

Use this tab to set up integration to your Outlook Contacts or to your LDAP server. When settings on this page are enabled, you can use the 'Lookup' feature to search for a name and phone number when using the toolbar to dial outbound calls.

Status Tab

Accept the defaults on this tab unless further customization is required.

The settings on this page control how your “presence” shows to other users in CTI Desktop. When you are on a call, it shows you in "standby" mode. You can set it to automatically switch to "available" x-number of seconds after ending a call.

Update Tab

VERY IMPORTANT! This setup ensures the desktop software auto-updates from the server when new versions are available:

1. Enter the URL:
   http://<CTI APPLIANCE IP ADDRESS>/CTIDesktopToolbar/CTIDesktopSetup.exe
   Note: Each dealership has its own unique URL that links to the CTI Desktop setup file, which updates the application. Therefore, you must replace the <CTI APPLIANCE IP ADDRESS> with the URL given to your administrator.
2. Select the Automatically check for updates every 5 days checkbox.
3. Select the Enable silent updates checkbox.
4. Click OK.
Advanced Tab

Accept defaults unless further customization is required. If required, change the default line for outgoing calls by clicking the down arrow on the Default line for outgoing calls dropdown, select the line, and click OK.

Creating Multiple CTI Desktop Shortcuts on Shared PCs

If more than one person shares the PC with the same Windows login, you can create multiple CTI Desktop icons so each user's preferences can be customized and saved. To create a second desktop shortcut to CTI Desktop:

1. Click Options on the toolbar and then click the Login tab.
2. Select Create Desktop Shortcut.
3. Enter the name of the user of the new shortcut.
4. Click OK.
5. Go to the desktop and double-click the new shortcut.
6. Select and configure the various configuration tabs according to user preference.

Note: You do not need to close CTI Desktop to use a different shortcut; double-click the shortcut and, if the application is already running, it applies the shortcut's settings.