

Phone Manager Application Support

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APPLICATION SUPPORT



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Microsoft Office 365

Overview

This document describes the features that are available when integrating Phone Manager with Office 365®.

Supported Versions

Office 365® is an online product and has no concept of a version numbering scheme, Phone Manager integration was tested against the version running in November 2015.

Features

Integration with Microsoft® Outlook® supports the features listed below:

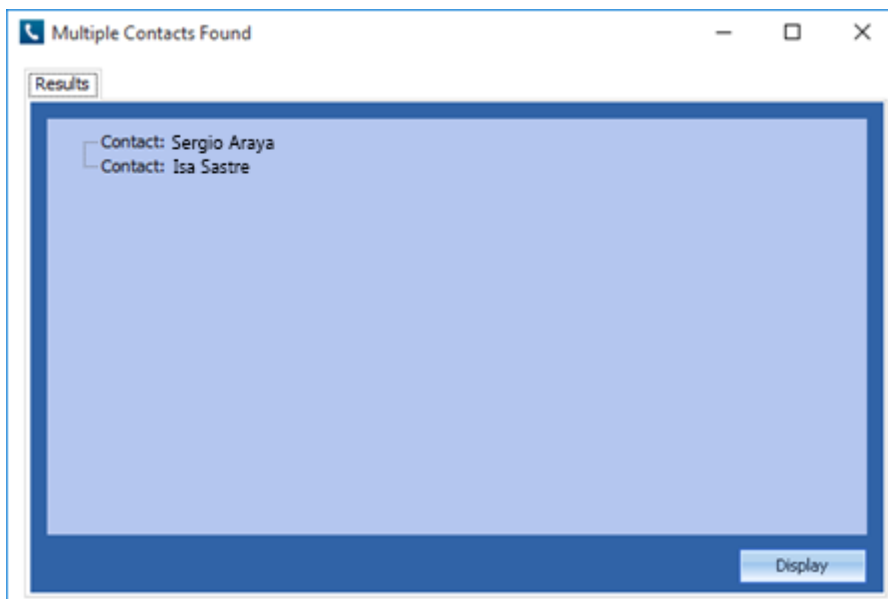
- [Screen pop for contacts](#)
- [Calendar / DND Synchronisation](#)
- [Call History Entry](#)

Screen pop for contacts

Office 365® personal contacts can be screen popped when an incoming call is received using the caller id from the inbound call or the dialled number on an outbound call. For example, an inbound call is received from 07718402534, if a contact exists then it is displayed through the users default web browser:



If multiple matches are found then the Multiple Contact Found dialog is shown.



When searching all the telephone fields with a contact supported by Office 365© are searched for a matching record. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 being searched for.

UK & International Telephone Formats			
08001831234	+44 (0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234
0800 1831234	0800-1831234	(0800)1831234	(0800)-1831234
(080)018-31234	0800 183 1234		

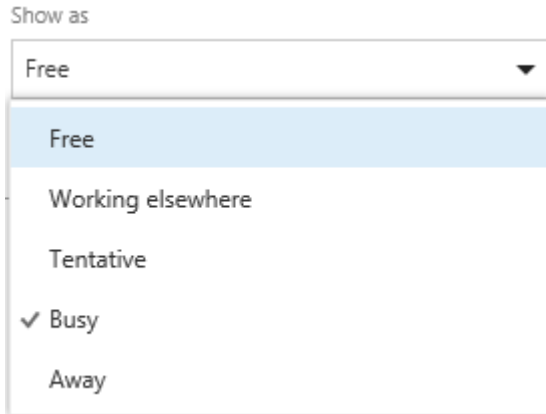
The default formats for the US are shown below. This is based on the number 9876543210 being searched for.

US Telephone Formats			
9876543210	19876543210	987-654-3210	1-987-654-3210
987.654.3210	1-987.654.3210	(987) 654-3210	1(987) 654-3210
+1 (987) 654-3210	(987)654-3210		

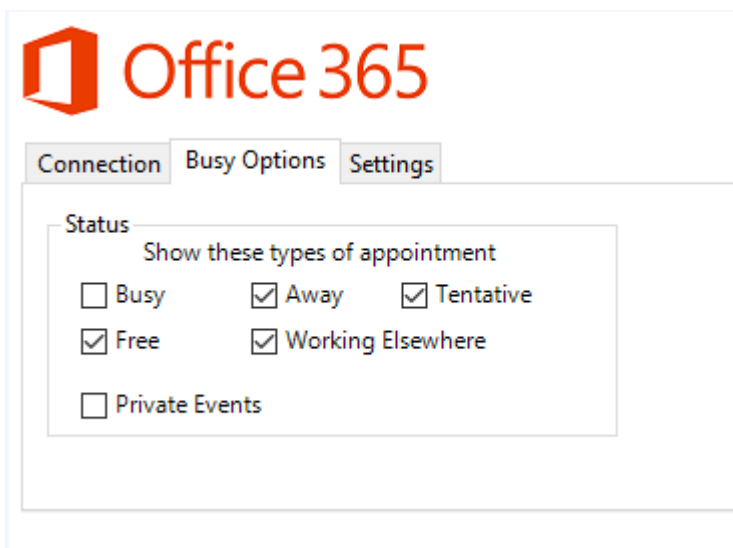
Calendar & DND synchronisation

The personal calendar within Office 365© can be synchronised with the DND status of the extension of the User. For example, when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the subject of the appointment. When the appointment ends, the extension will be automatically removed from DND.

Busy states The busy status of the appointment can be used to filter what type of appointments will be used to automatically change the DND status.

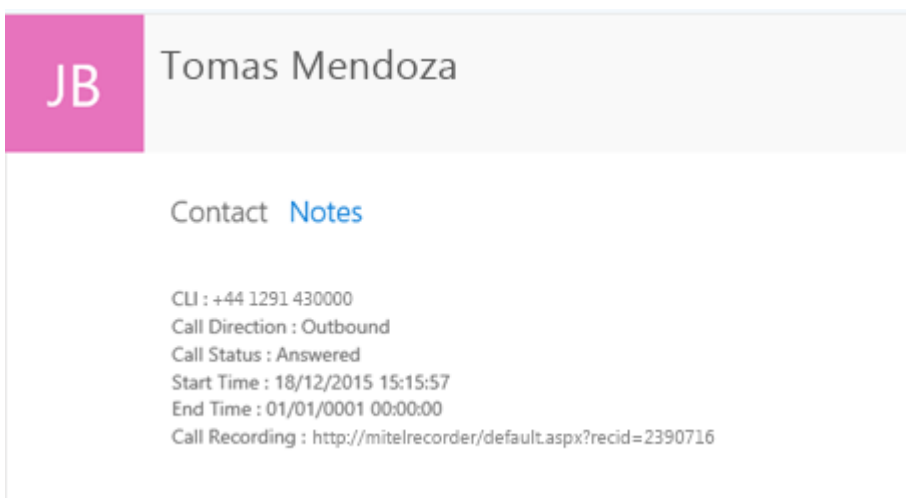


From the Busy Options tab check each entry to include this type of busy status.



CallHistory Entry

Phone Manager can work with the notes field within an Office 365® Contact and can have Phone call entries automatically created for calls made or received by the User when a match has been found to an entry in their Office 365® contacts. The contact to associate with this is found using the caller id received or dialled. If multiple matches are found then the Search Results window is shown as for the screen pop.



Configuration

The integration to Office 365® requires the users individual User Id and password.

Office 365

Connection Busy Options Settings

Office 365 User ID

Password

There is also an option to show the default contacts page when there is no contact match:

Office 365

Connection Busy Options Settings

Open Default Contacts Page on 'No' Match

Test

There is also a 'Test' button which will test whether the configured user credentials are correct.



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