

# Phone Manager Application Support

APRIL 2016

DOCUMENT RELEASE 4.3

APPLICATION SUPPORT



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# Microsoft Outlook

## Overview

This describes the features that are available when integrating with Microsoft® Outlook®.

## Supported Versions

The following Microsoft® Outlook® versions are supported.

Version	Supported
Outlook® 2010 32bit	 <sup>1</sup>
Outlook® 2010 64bit	 <sup>1</sup>
Outlook® 2013 32bit	 <sup>1</sup>
Outlook® 2013 64bit	 <sup>1</sup>
Outlook® 2016 32bit	 <sup>1</sup>
Outlook® 2016 64bit	 <sup>1</sup>
Business Contact Manager for Outlook®	

<sup>1</sup> Desktop client for Microsoft® Windows


## Features

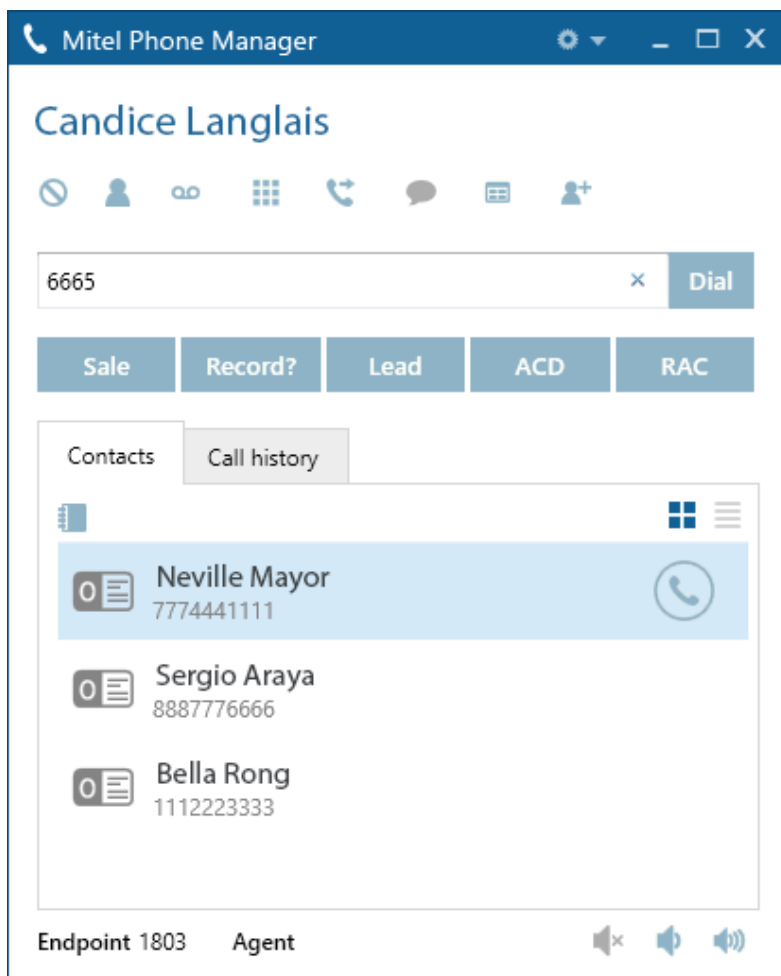
Integration with Microsoft® Outlook® supports the features listed below:

- [Directory import for contacts](#)
- [Click to dial](#)
- [Meet-Me conference creation](#)
- [Screen pop for contacts](#)
- [Automatic journal entry](#)
- [Calendar & DND synchronization](#)
- [Business Contact Manager for Outlook](#)

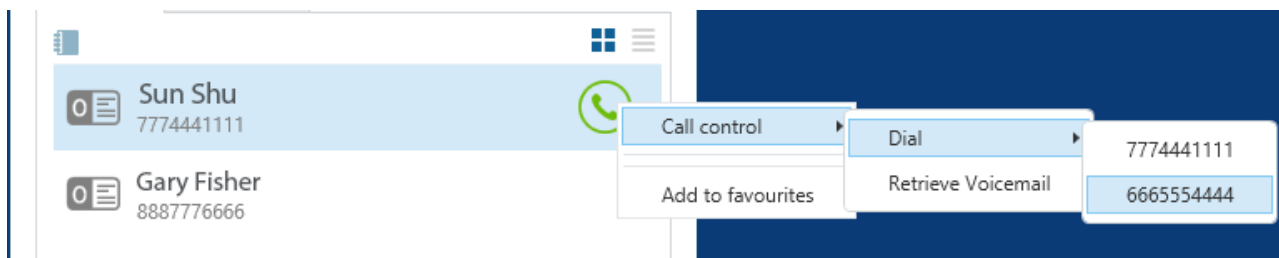
### Directory import for contacts

Users can enable their Outlook® personal contacts to be linked into Phone Manager. This enables the contact to be searched for using the *Home*, *Telephone* or *Mobile/Cell* numbers as well as the *first*, *middle*, *last* or *company name* fields directly from within Phone Manager. As there can be other types of contacts shown in the Phone Manager contacts window, Outlook®


contacts are shown with a  icon next to them.



Once found they can then be dialed using any of the numbers associated with the contact. Clicking on the dial icon will call the main number but any number can be selected by right clicking and selecting the relevant number to call.

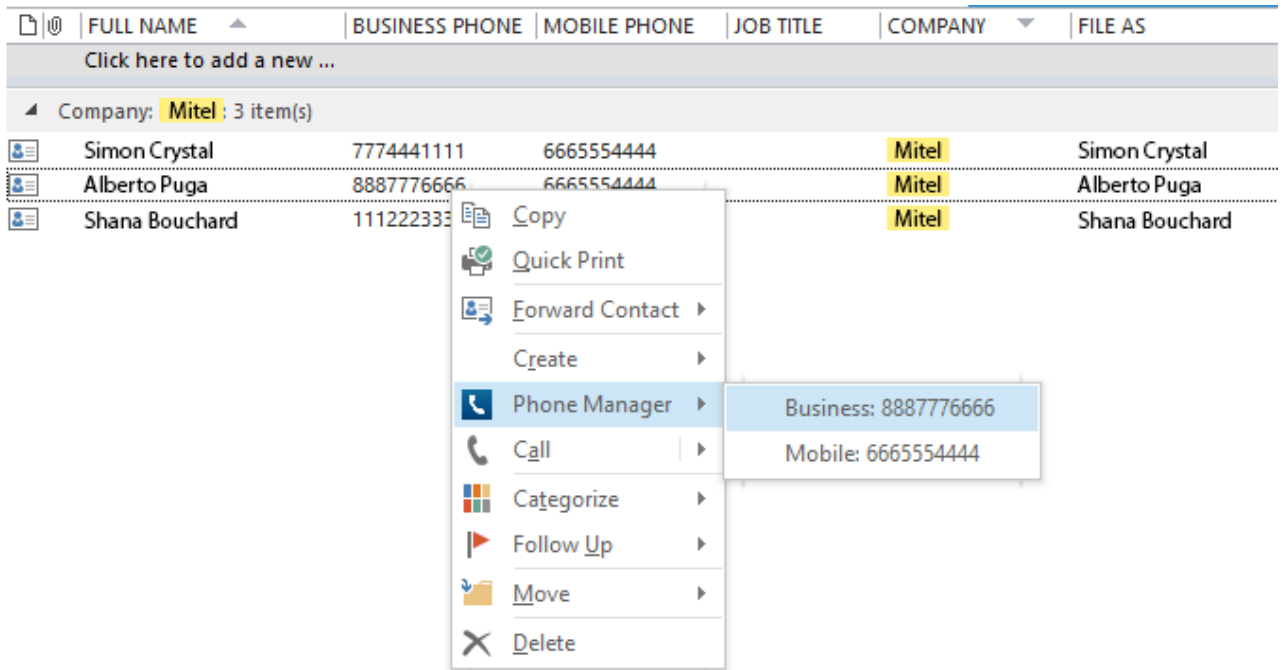


Frequently accessed contacts can be pinned to the Users favorites directory, by right clicking on the contact entry and selecting *Add to favorites*, so that they permanently appear on the contacts tab.

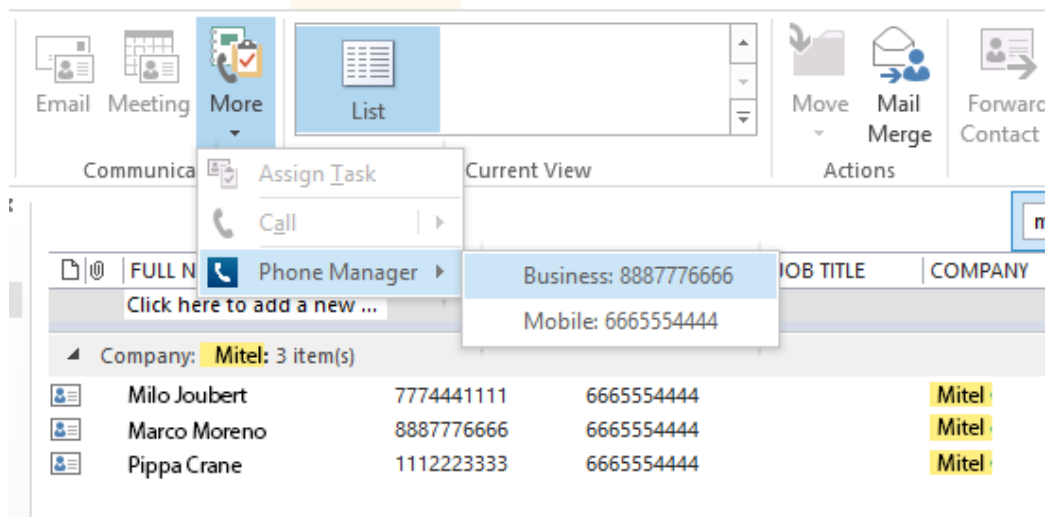
 Only contacts in the users personal folder are available for directory searching and adding to favorites.

### Click to dial

Calling a contact directly from Outlook® is supported when using the Phone Manager Outlook® Add-In. This is installed by default with each Phone Manager client and adds new entries to the contacts screen within Outlook®. When the contact list is open a User can right click on a contact and select the *Phone Manager* menu and then select the number to call.



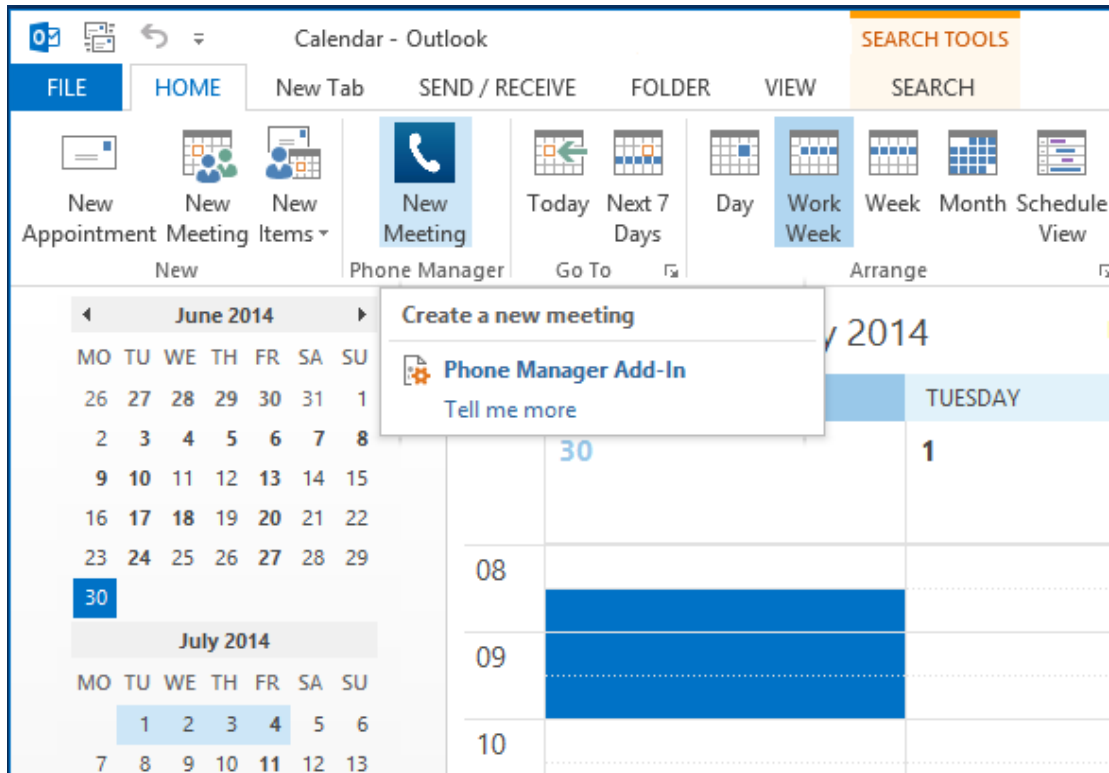
When in the contact list or contact details view at the top the ribbon bar can also be used. From the *Communicate* ribbon, select *More* and then *Phone Manager*.



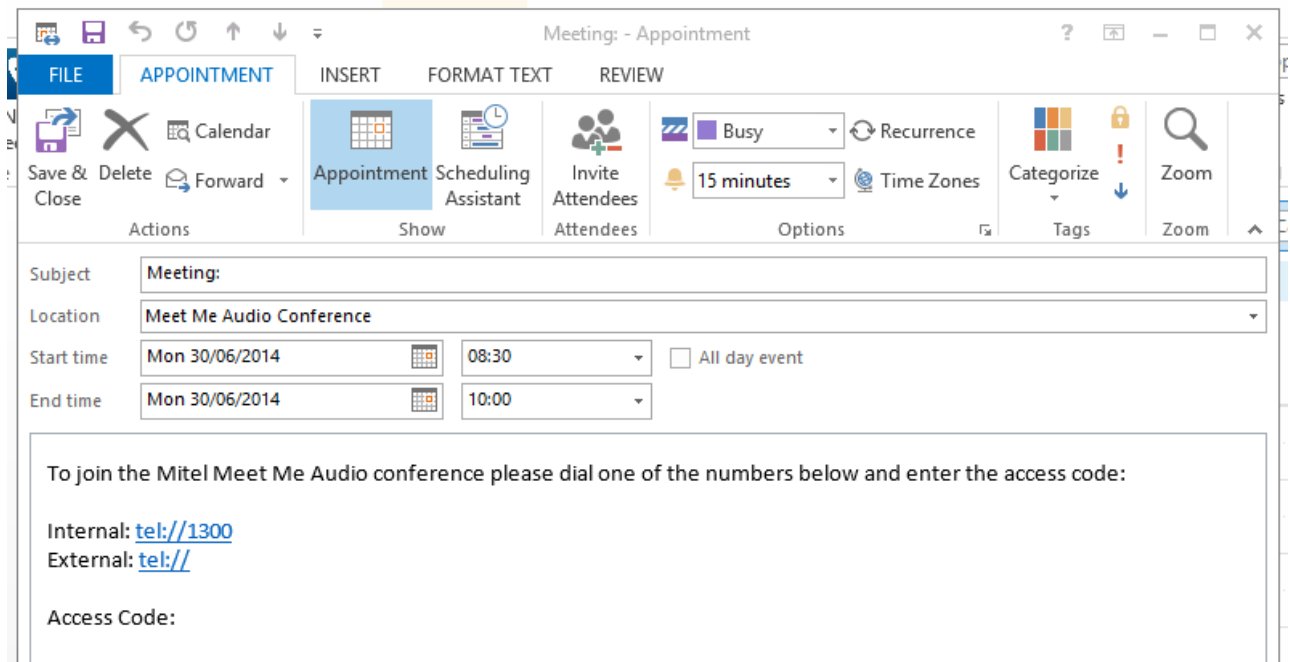
This requires Phone Manager to be running in the same Windows session as Outlook®.

### Meet-Me conference creation

Creating a new Meet-Me conference appointment directly from Outlook® is supported when using the Phone Manager Outlook® Add-In. This is installed by default with each Phone Manager client and adds new entries to the calendar screen within Outlook®.

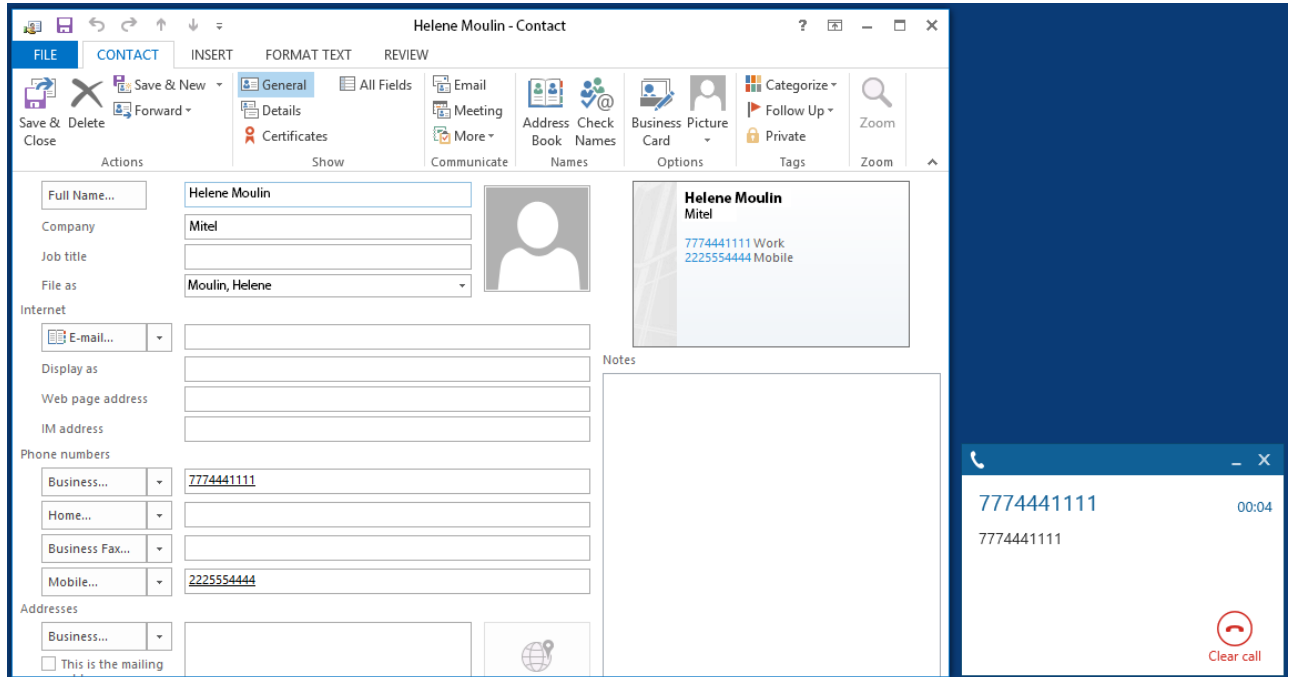


When selected, a new appointment is displayed that is pre populated with the telephone number and access code to dial into a Meet-Me conference.

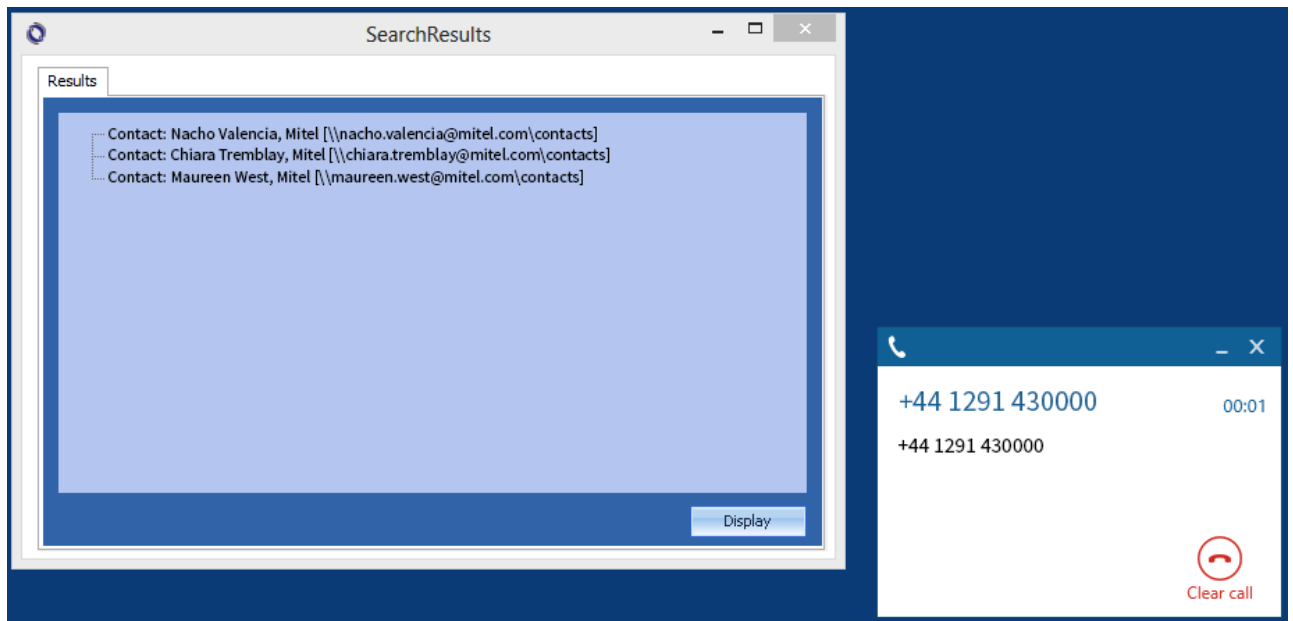


### Screen pop for contacts

The Users local or public contacts can be screen popped directly within Outlook® when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin has then performed a search on the Outlook® contacts to find any records that have matching telephone numbers. A match was found and the Outlook® contact records was automatically displayed.



If multiple matches are found then the *Search Results* window is shown and enables the User to select the correct contact to be displayed. For example a call is made to 222555444 and this has found three contacts that have this telephone number.




Double clicking on the relevant contact or highlighting and clicking on the *Display* button will show the required Outlook® contact.

### Contact folders

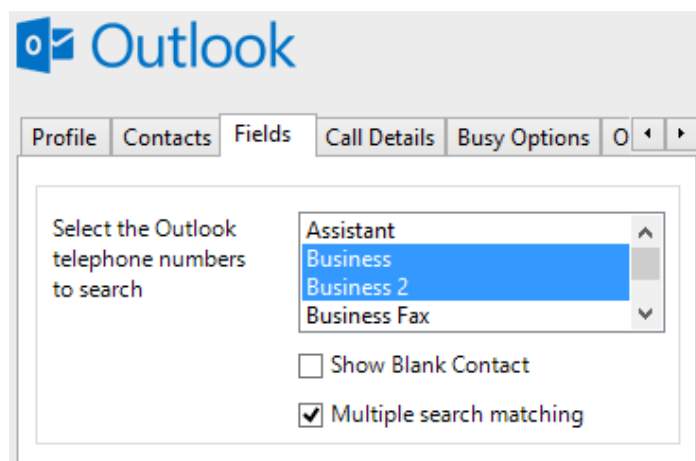
The Users local Outlook® contact folder is used when trying to find any matching contacts (**Default**). Additional Outlook® Public folders can be added to the search from the *Contacts* tab in the configuration.

To enable public folders to be searched check the *Search Public Contact Folders* option and then click on the *Refresh* button. This will list all of the available public folders for this User and then the appropriate options can then be selected.


















 Using public folder searching may require additional time to perform the search and could delay any matches from being found.

### Contact fields


The telephone number fields that are to be searched can be configured for the contacts from the *Fields* tab in the configuration.



The list shows all of the available telephone number fields and if they are enabled for searched by default. These are the default field names and descriptions and may be different from the ones shown in Outlook®.

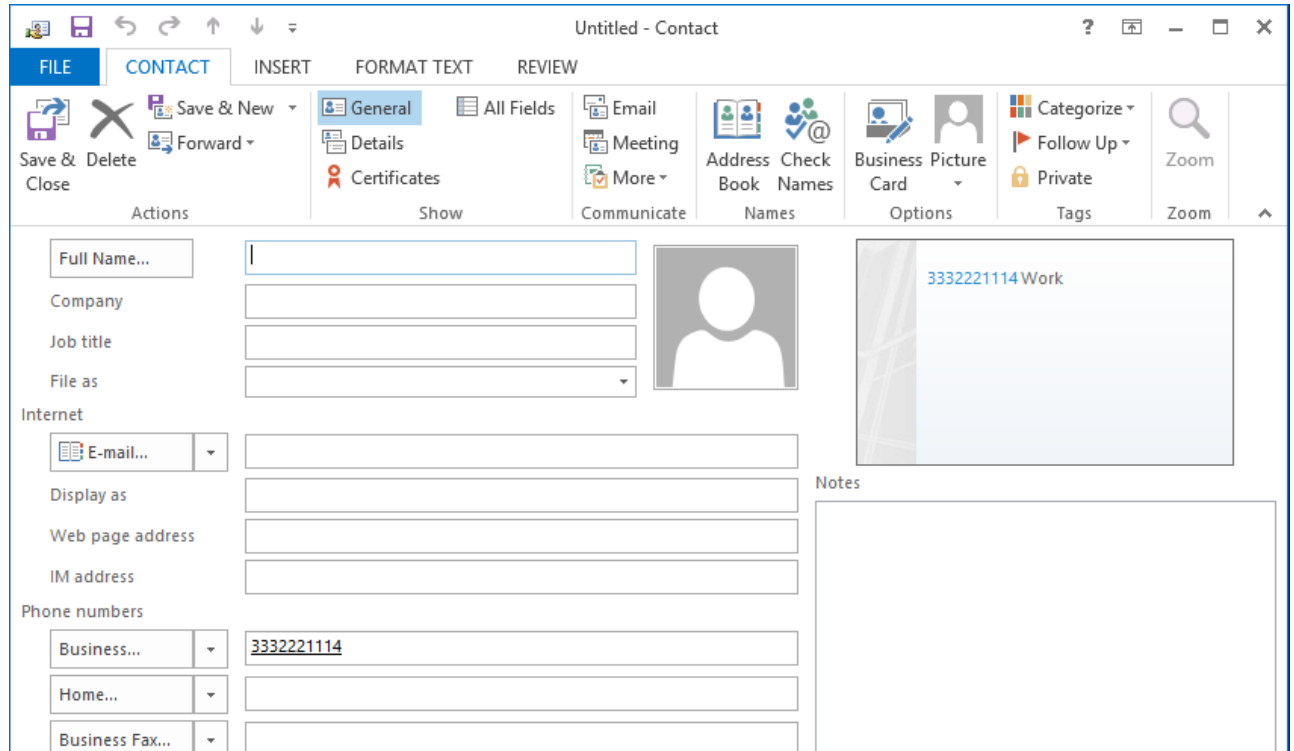
Outlook Description	Outlook Field Name	Enabled?
Assistant	AssistantTelephoneNumber	
Business	BusinessTelephoneNumber	
Business 2	Business2TelephoneNumber	
Business Fax	BusinessFaxNumber	
Callback	CallbackTelephoneNumber	
Car	CarTelephoneNumber	
Company	CompanyMainTelephoneNumber	
Home	HomeTelephoneNumber	
Home 2	Home2TelephoneNumber	
Home Fax	HomeFaxNumber	
ISDN	ISDNNumber	
Mobile	MobileTelephoneNumber	
Other Fax	OtherFaxNumber	
Pager	PagerNumber	
Primary	PrimaryTelephoneNumber	
Radio	RadioTelephoneNumber	
Telex	TelexNumber	



TTY/TDD	TTYTDDTelephoneNumber	
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**Unmatched Contacts**

If no matches are found then a blank contact can be shown with the outside number pre populated into the *Business* telephone field. Check the *Show Blank Contact* option to enable this, or uncheck (**Default**) to not do anything when no match is found to a call.



**Multiple search matching**

When more than one contact is matched and the *Multiple search matching* option is checked (**Default**) the *Search Results* window is displayed to the User to allow them to select the relevant contact. If this option is not checked then the first match found will be used and any further searching will be stopped. This can be useful when using public folders to reduce the time taken to perform the search.

**Telephone number formats**

Outlook© does not provide a standard format for storing telephone numbers within the system by default. Depending on the region where the client is running then different formats will be used:

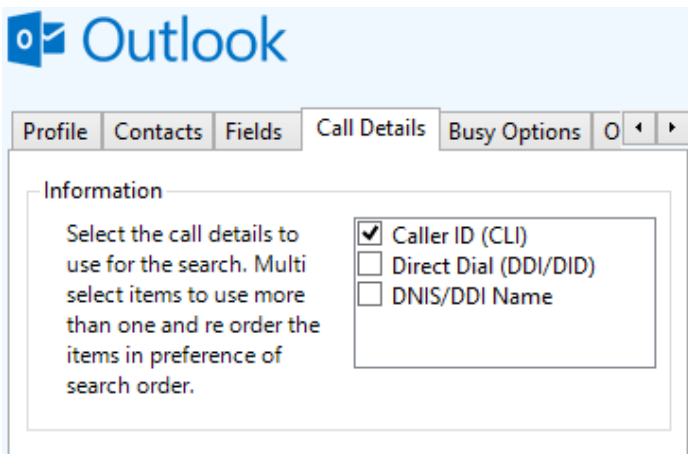
UK & International Telephone Formats			
08001831234	+44 (0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234
0800 1831234	0800-1831234	(0800)1831234	(0800)-1831234
(080)018-31234	0800 183 1234		

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			
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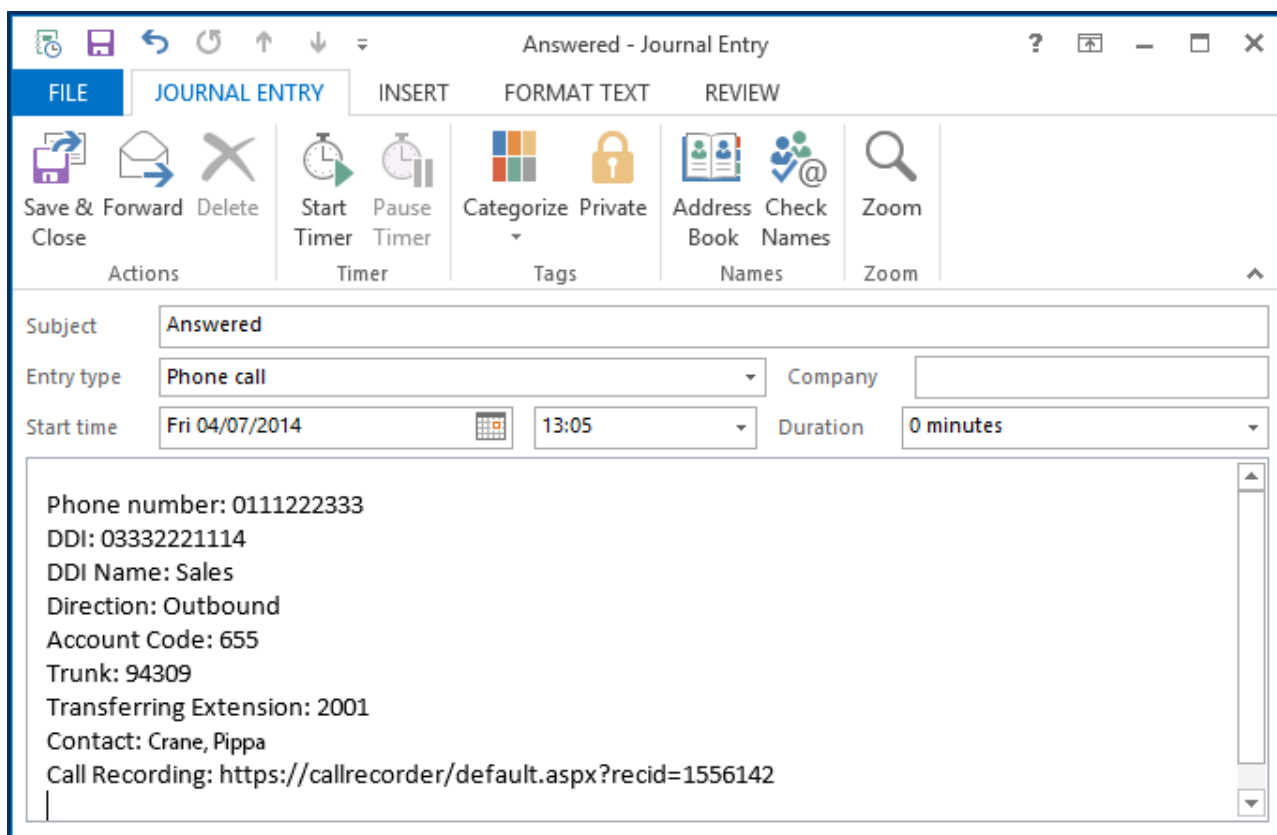
**Call details**

The call information that is used to search for matching records can be configured. By default the dialed number or the caller id are used to search depending on the call direction, but other call details can be configured. There are options for the direct dial number (DDI/DID) or the direct dial name (DNIS).



**Automatic journal entry**

Phone Manager can work with the Journal within Outlook® 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 Outlook® contacts. The contact to associate with this is found using the caller id received or dialed. If multiple matches are found then the *Search Results* window is shown as for the [screen pop](#).



The body of the journal item is populated with the information below and the start and duration of the call.

<b>Phone number</b>	For inbound calls this is the caller ID and for outbound calls this is the dialed number.
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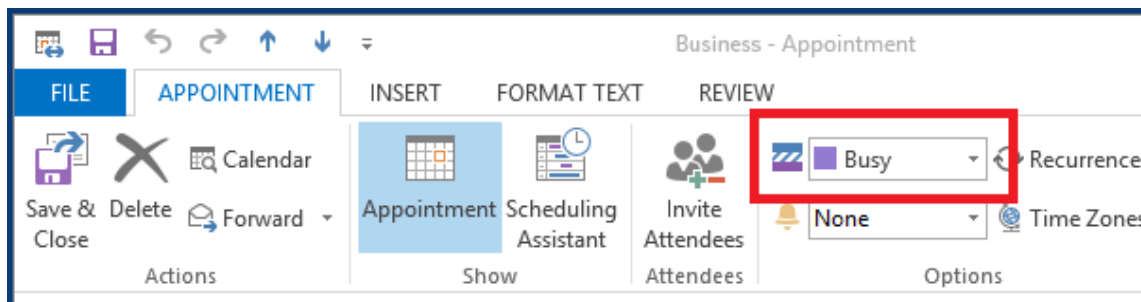
<b>DDI/DID</b>	For external inbound calls only, the DDI/DID number that the call came in on.
<b>DDI/DID Name</b>	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
<b>Direction</b>	The direction of the call.
<b>Account Code</b>	The account codes that was set on the call.
<b>Trunk</b>	For external calls the outside network trunk number that the call was made or received
<b>Transferring Extension</b>	The device that the call was transferred from.
<b>Contact</b>	The Outlook® contact name in the <i>last name, first name</i> format.
<b>Duration</b>	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
<b>Call Recording</b>	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser) The call event trigger must have been set to at least Call Answered as the call recorder only create the recording id when the call has been answered.

### Calendar & DND synchronization

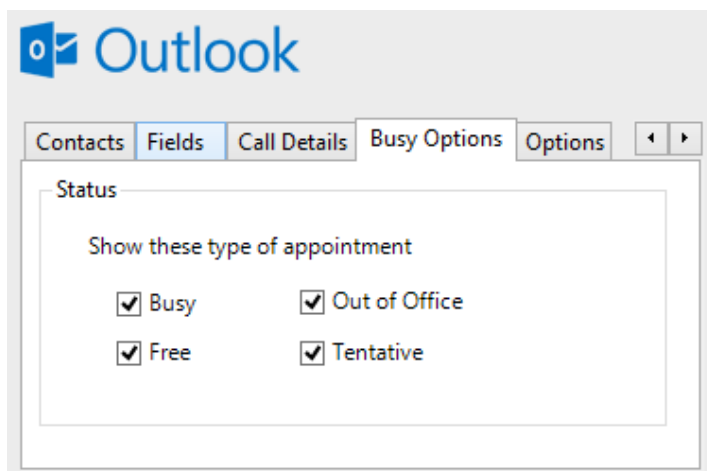
The calendar within Outlook® can be synchronized with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the subject of the appointment. When the appointment 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.



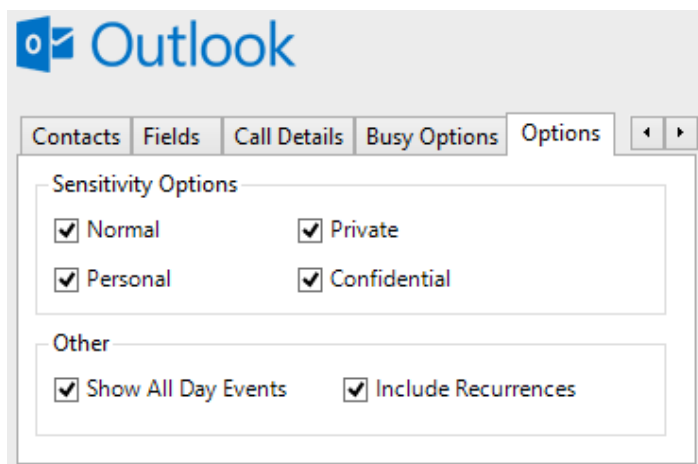
From the *Busy Options* tab check each entry to include this type of busy status.



#### Sensitivity options

The sensitivity type of the appointment can be used to filter what type of appointments will be used to automatically change the

DND status. From the *Options* tab check each of the *Sensitivity Options* to include this type.




### ***Other options***

There are other options that can be used to filter the type of appointments to include. Check the *Show All Day Events* include all day events. Check the *Include Recurrences* to include appointments that are recurring.

## **Business Contact Manager for Outlook**

Phone Manager supports integration with contacts stored within Business Contact Manager for Outlook in the same way as for contacts that are stored within [Public Folders](#).

 Business Contact Manager contacts are not available for directory searching and adding to favorites.



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