Technical Publications.

ZULTYS
SMARTER COMMUNICATIONS

User Manual
Zultys Outlook Communicator

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Edition Notice

This edition applies to Version 1 of Zultys Outlook Communicator and all subsequent releases and modifications until otherwise indicated in new editions.

Technical Publications

1 Table of Contents

User Manual

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User Manual

1   Introduction to Zultys Outlook Communicator

1.1   Feature Description

Companies that have installed a Zultys MX IP-PBX system and that have agents/users that use Microsoft Outlook can integrate the two systems using the *Zultys Outlook Communicator Adapter*. After an agent installs the adapter software, from within Outlook that person can make, receive, transfer and disconnect calls through the MX, and automatically obtain a caller's contact information in a pop-up Outlook window. Additionally, at a call's conclusion, Zultys Outlook Communicator automatically can open a Microsoft Outlook journal window to document the call.

1.2   Zultys Outlook Communicator Requirements

For Zultys Outlook Communicator to occur, the agent ….

  ➢   … is running Microsoft Windows 7, Windows Vista, or Windows XP.

  ➢   …has installed a 32-bit or 64-bit version of Microsoft Outlook 2007 Service Pack 2 or Outlook 2010.

  ➢   … has installed the *Zultys Outlook Communicator Adapter* software.

The following MAPI providers also are supported: Microsoft Exchange 2003/2007/2010, both cached and non-cached, and PST.

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1.3   Installation of *Zultys Outlook Communicator Adapter*

1. Microsoft Office is available in both 32-bit and 64-bit versions. Download the appropri-ate Zultys Outlook Communicator Adapter setup software for the Outlook version being used. This determination is independent of the version of Microsoft Windows you are using whether 32-bit or 64-bit. The adapter software is in a Microsoft MSI Installation format.

2. Run the setup software to install the *Zultys Outlook Communicator Adapter* on the agent's computer (***Note: Microsoft software installation rights are required***).

3. The **Zultys Outlook Communicator Setup Window** opens.
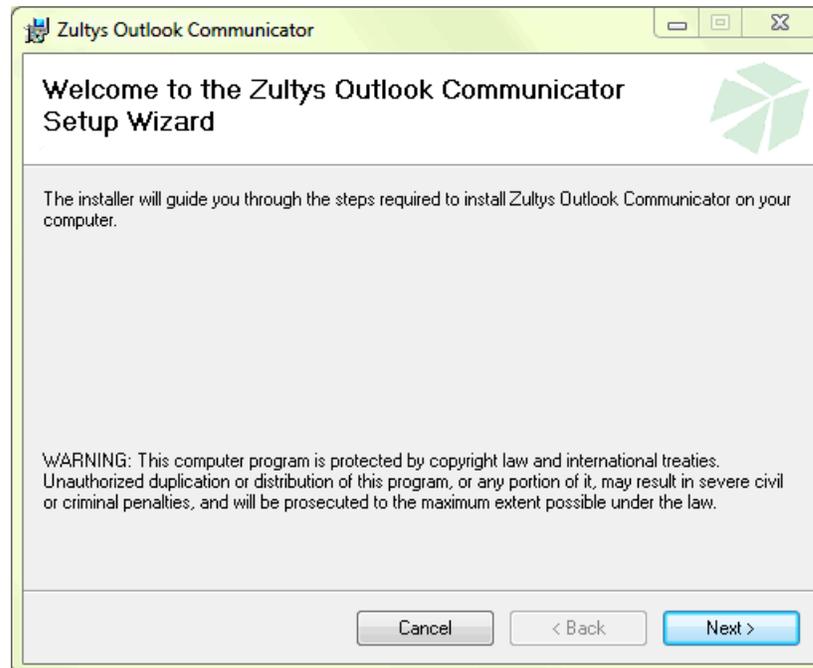
4. Click on the **Next** button.

5. A **Select Installation Folder** window opens. Use the default folder location or browse to a different folder.
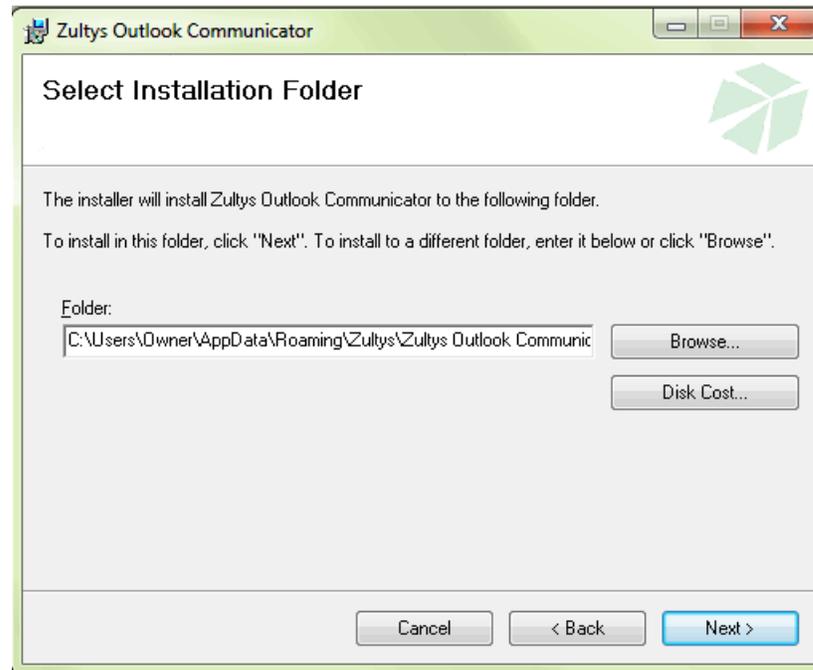
6. Click on the **Next** button.

7. A **Confirm Installation** window opens.
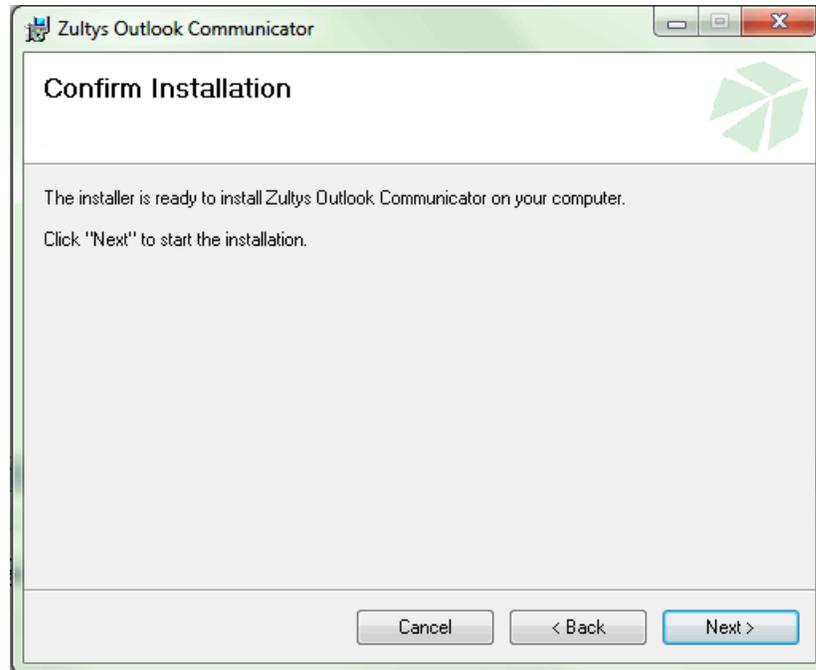
8. Click on the **Next** button.

9. The installer will install the Zultys Outlook Communicator adapter.
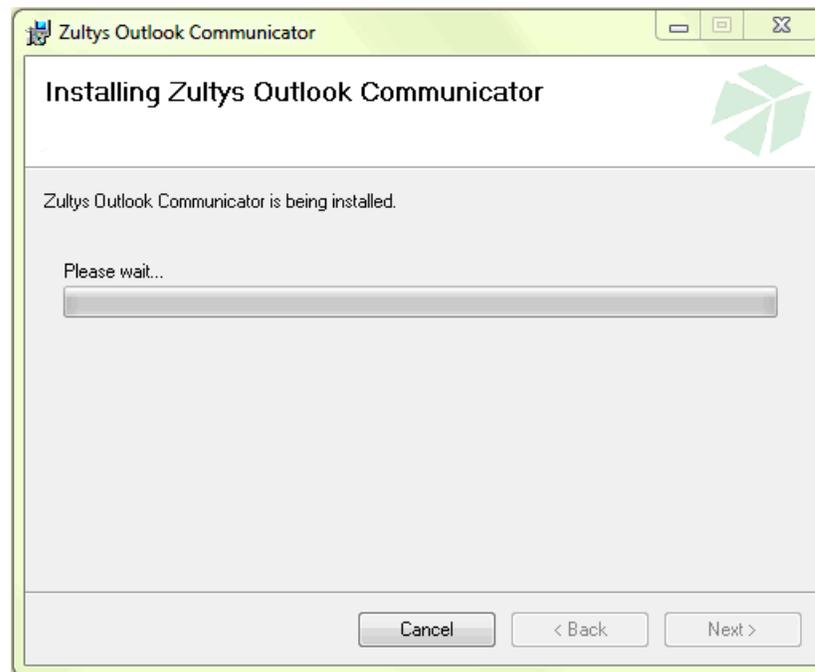
10. An **Installation Complete** window opens.

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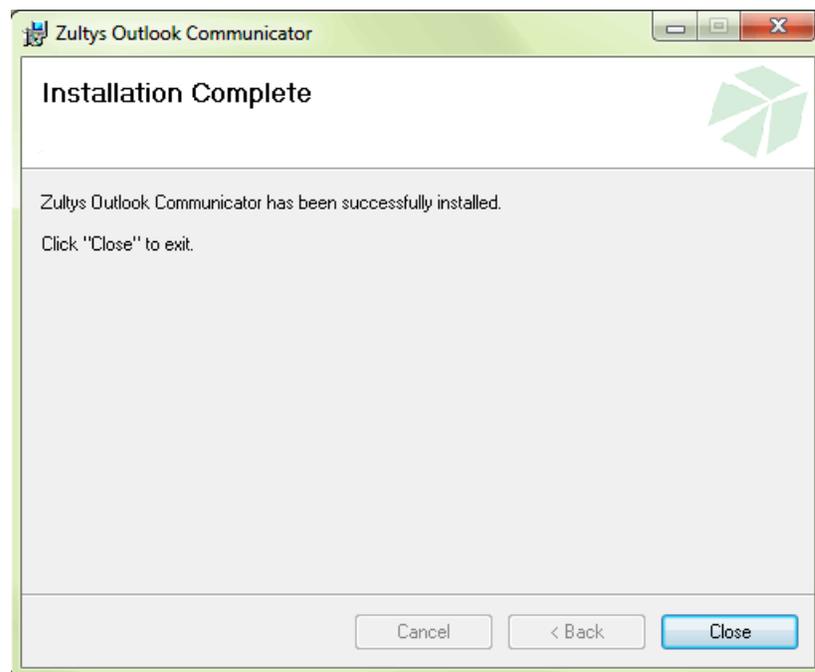
11. Click on the **Close** button.

1.4 Silent Installation of *Zultys Outlook Communicator Adapter*

A silent installation option is available to an Administrator, which uses a distribution service such as SMS server or equivalent. The silent installation permits the installation of the *Zultys Outlook Communicator Adapter* software on agents' computers without any prompting or key-board input.

2   Zultys Outlook Communicator Interface

1. After the *Zultys Outlook Communicator Adapter* is installed, Outlook displays a new *MX Communicator* tab

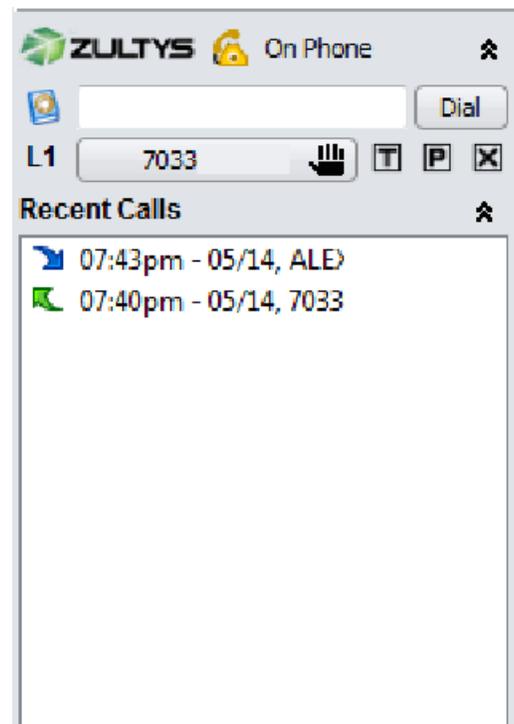2. Clicking on the **MX Communicator** tab allows an agent to perform an MX *Login*, MX *Logout*, set *Settings*, *Send Log* to the Zultys Support department for a problem resolution, and obtain information about the Zultys Outlook Communicator version currently being used.

3. In addition to the *MX Communicator* tab, a *The Zultys Outlook Communicator's Control Pane* displays in the left panel of the Outlook window. The *Zultys Outlook Communicator's Control Pane* sets Presence status, lists recent calls, permits call control through the Zultys MX IP PBX, and displays line and Caller ID information.
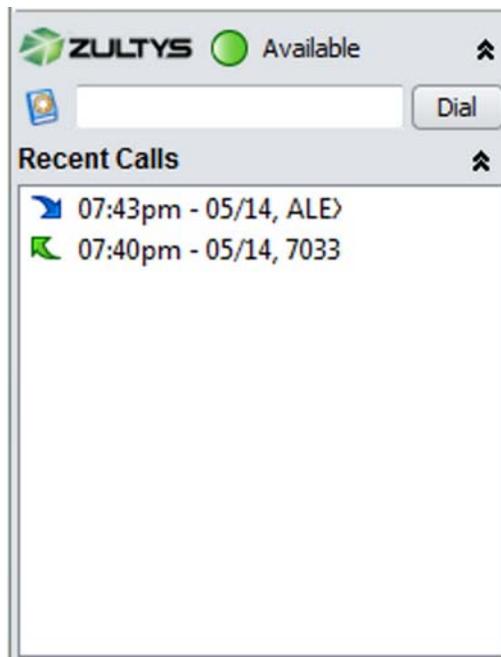
4. The size of the *Zultys Outlook Communicator's Control Pane* can be changed by clicking on the top or right border of the pane and dragging it.

3 Zultys Outlook Communicator Setup

1. Under the *MX Communicator* tab, click on the *Settings* icon.

2. A **Settings** window opens.

3. In the *Credential Settings* block, complete the entries for agent's MX Login, Password, the IP address of the MX and the agent's callback phone number
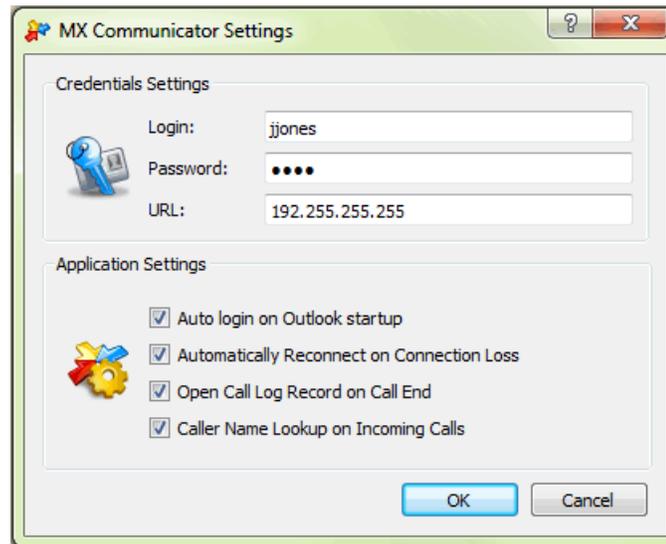
4. In the *Application Settings* block, click on the checkbox next to each applicable option to enable it.

5. Click on the **OK** button.

4 Zultys Outlook Communicator Login to MX

1. Under the *MX Communicator* tab, click on the *Login* icon.

2. An *MX User Login* window opens.
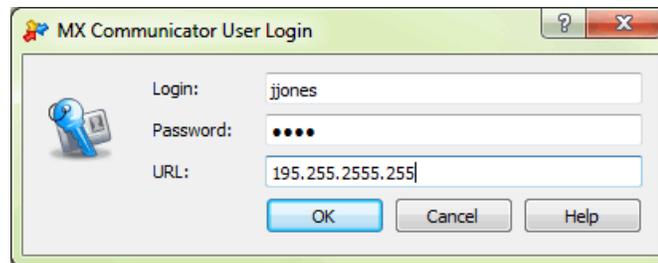
3. Change any data, as applicable

4. Click on the **OK** button.

5. The Presence status indicator in the *Zultys Outlook Communicator's Control Pane* changes from Offline to Available.

5   Zultys Outlook Communicator Logout from MX

1. Under the *MX Communicator* tab, click on the *Logout* icon.

2. The status indicator in the *Zultys Outlook Communicator's Control Pane* changes from Available to Offline.

6 Making an Outbound Call Using Zultys Outlook Communicator

6.1 Calling from the Outlook Contacts Folder

1. Click on **Contacts** to display the Microsoft Outlook **Contacts** folder.

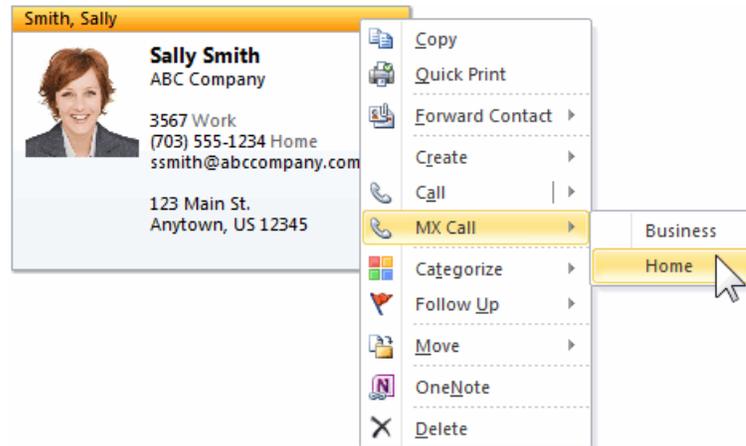2. From any view, click on the contact being called.

3. Click on the *Call* icon at the top in the **Communicate** group.

4. From the dropdown menu, select the phone number being called.

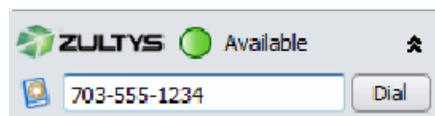5. Alternatively, right-click on the contact being called.

6. From the dropdown menu, select *MX Call*.

7. From the second dropdown menu, select the phone number being called.

6.2   Calling from the Dial Window

1. The dial window is located in the *Zultys Outlook Communicator's Control Pane.*

2. Enter a phone number directly into the dial window.

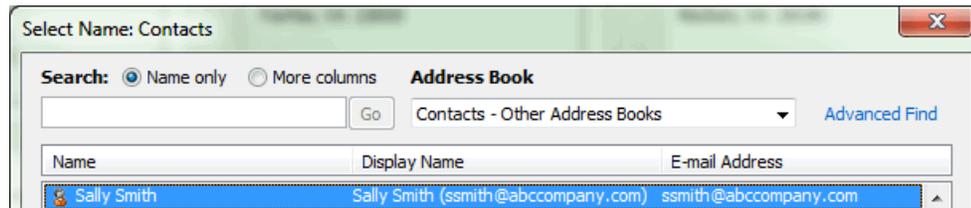3. Click on the button.

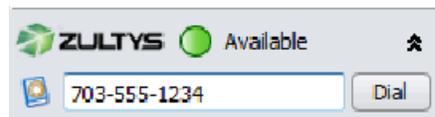## 6.3 Calling from an Address Book

4. Click on the address book button in the *Zultys Outlook Communicator's Control Pane.*
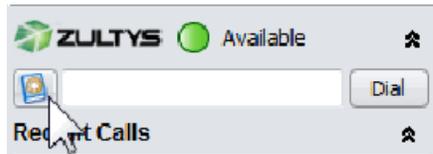
5. A **Select Name: Contacts** window opens.

6. Navigate to an address book and click on the contact being called.
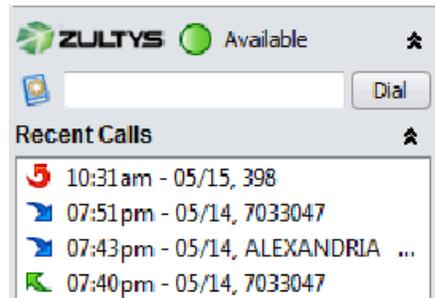

7. Click on the **OK** button.

8. The called number is inserted within the dial window.

9. Click on the button.

6.4   Calling from the Recent Calls List

1. A 10 days history of recent calls in displayed in the *Zultys Outlook Communicator's Control Pane.*

This list shows:

- Icon indicating call's origination - outbound or inbound, and if the call had been connected
- Time
- Date
- Caller ID
- Contact name (when available).

2. The Recent Calls list can be expanded for viewing by clicking on the Zultys Outlook Communicator's Control Pane's separator bar and dragging upward.
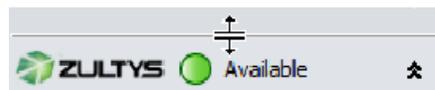
3. Click on the contact being called in the list.

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5/17/2011.
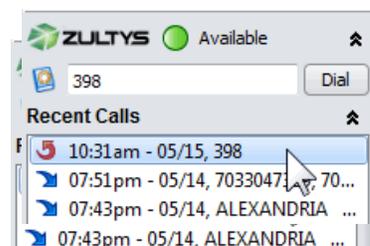
4. The phone number is automatically inserted into the dial window.

5. Click on the [Dial] button.

6.5 *Zultys Outlook Communicator's Control Pane* **View after Call Connection**

1. After the called party answers, the *Zultys Outlook Communicator's Control Pane* changes and displays the line number, the called number and call control buttons.
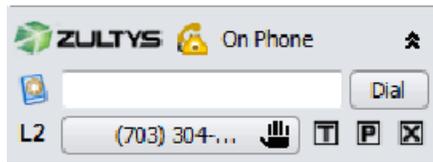
2. The agent's Presence status also changes to *On Phone*.

7 Receiving an Inbound Call in Zultys Outlook Communicator

7.1 Call Notification

When a call is received, a notification pop-up alerts the agent to the call and provides information about the Caller ID.

7.2 Answering an Inbound Call

1. When the call is answered, The *Zultys Outlook Communicator's Control Pane* changes and displays the line number, the Caller ID, the contact's name and call control buttons.
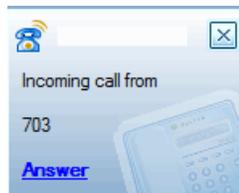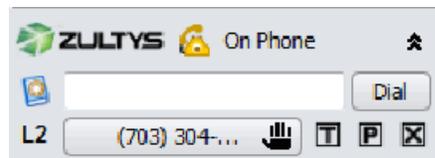

2. The agent's Presence status changes to *On Phone*

7.3 Caller's Contact Record Pop-Up

When the Caller ID is identified with a contact in the Microsoft Outlook Contacts folder, that contact's information window automatically pops up *if this option has been selected under MX Communicator/Settings.*
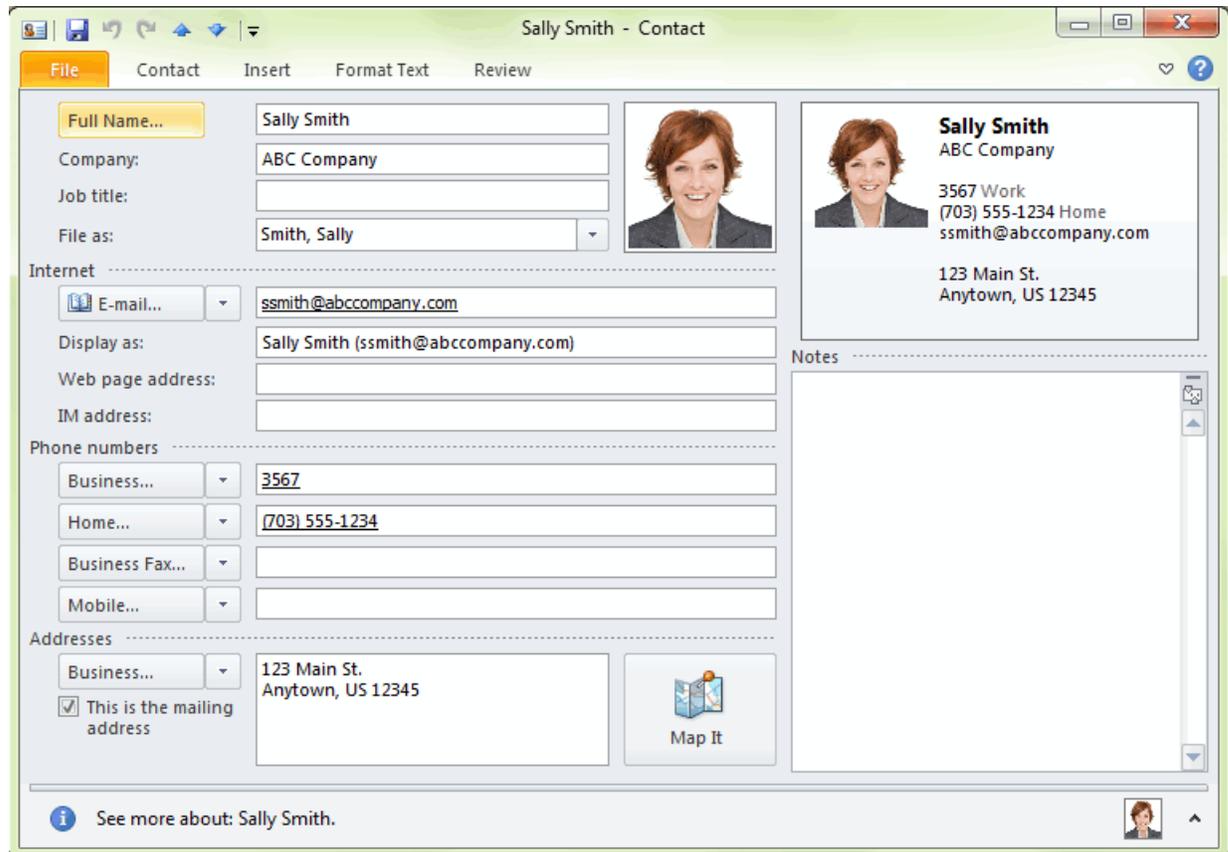
8   Call Handling Functions

Call handling functions are provided by the control icons in the *Zultys Outlook Communicator's Control Pane* allowing the agent to put a call on hold, retrieve the call, transfer a call, park a call for pick up at a different phone, or end the call.

Press this icon during a voice call to put the call on hold.

The Dial button becomes active and another call can be placed or answered on a different line, if desired.
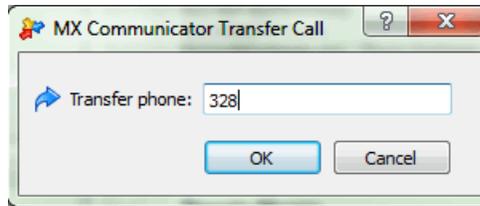
Press this icon to retrieve a call on hold.

Press this icon during a voice call to transfer the call to another user.

   a.   A **Call Transfer** window opens

b. Enter the transfer phone number.

c. Click on the **OK** button.

d. The call is transferred.

e. The agent's Presence status changes to *Available*.

[P] Press this icon during a voice call to park the call.

a. The call is parked

b. A parked call pop-up window opens revealing the retrieval number of the parked call.

c. The agent's Presence status changes to *Available*.

d. If the parked call is not retrieved within the MX system's time parameter (typically two minutes), the call will rebound to the agent.

[X] Press this icon during a voice call to disconnect call.

9 End-of-Call Journal

1. Whenever a call ends, whether by hanging up, transferring the call, or by parking it, a Journal Entry window automatically opens **if this option has been selected under** *Zultys MX Communicator/Settings*.
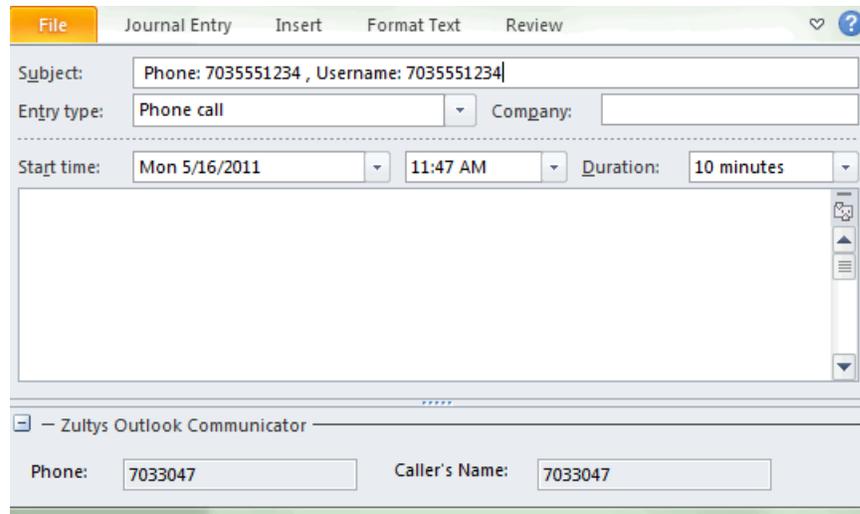

2. If the caller is in the agent's **Outlook Contacts** folder, the Journal will be saved in that contact's database.

3. If the caller is unidentified, the agent can create a new contact record and save the journal in the new contact's database.
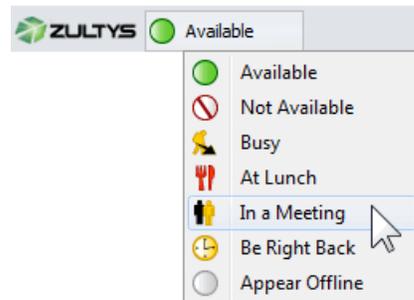
10 Changing Presence Status Indication

10.1 Changing Presence Using Zultys Outlook Communicator's Control Pane

1. To change Presence, in the *Zultys Outlook Communicator's Control Pane*, click on the Presence indication.
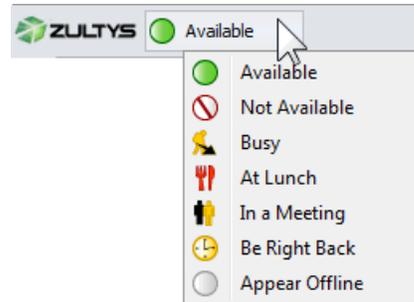
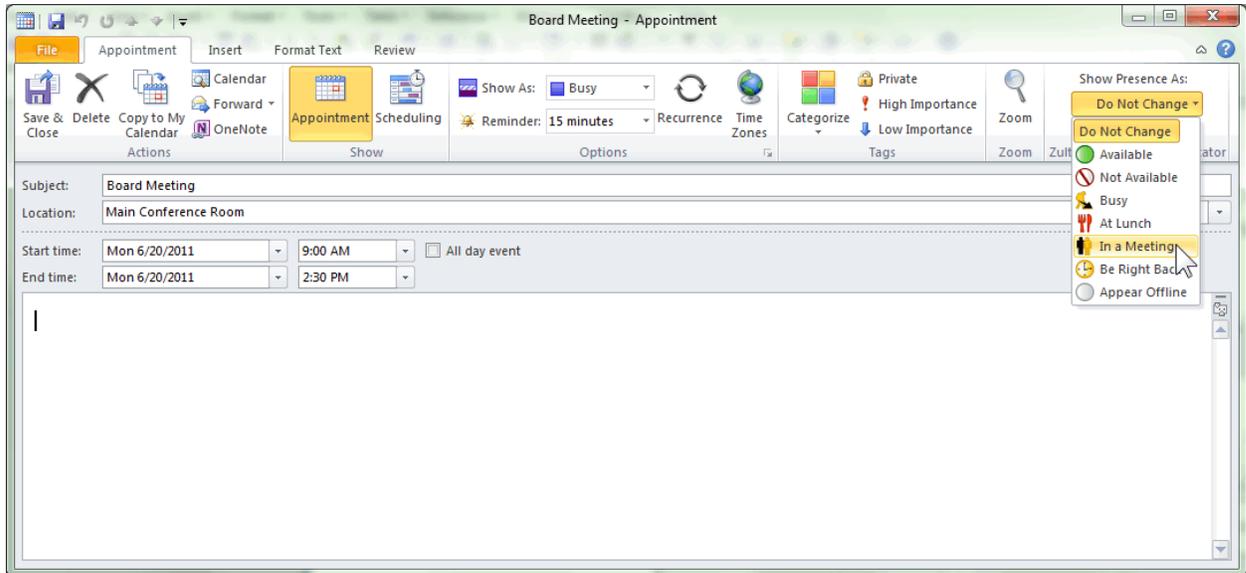

2. From the dropdown menu, select new Presence indication


3. The Presence status is changed.

10.2 Changing Presence Using Outlook Calendar

1. When scheduling an appointment, meeting or event in **Outlook Calendar**, the Outlook ribbon displays a group called *Zultys Outlook Communicator* with the command **Show Presence As:**

2. The default indication is *Do Not Change*, which means the presence indication will not be altered automatically at the time of the appointment, meeting or event.

3. Click on the Presence indication. From the dropdown menu, select the new Presence indication to be shown.
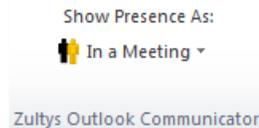
4. The agent's Presence will be changed automatically to that selection when the event starts, and will change back at the event's conclusion.

11 Troubleshooting

Agent is unable to install *Zultys Outlook Communicator Adapter* software.

Installer must have Microsoft operating system software install privileges.

Zultys Outlook Communicator adapter is installed but the MX Communicator tab does not appear in Outlook

Check that the correct version of the **Outlook Communicator** adapter software is installed -- 32-bit or 64-bit. The correct version to be used is dependent on the version of Outlook being run. It is *not* determined by the bit-level of the Windows operating system being used.

**Zultys Outlook Communicator Adapter does not Integrate with the MX**

Check that the adapter has the correct IP address of the MX.

Zultys Outlook Communicator's MX Log-In Failed.

Check that your MX agent's log-in information is correct.

Troubleshooting.

1. The *Zultys Outlook Communicator Adapter* provides for comprehensive error detection. If a serious error occurs, a Zultys troubleshooting window opens.
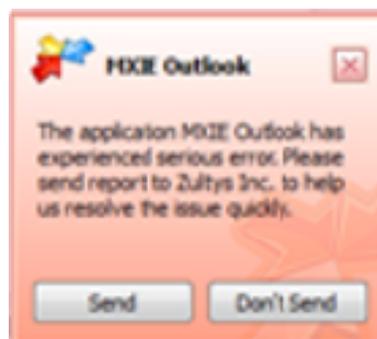
2. Click on the **Send** button to send a compressed log and a database dump to Zultys' Customer Service.

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3. Alternatively, the log can be sent by clicking on the **MX Communicator tab** and on the *Send Log* icon.