

Outlook and Internet Explorer – Assistant Toolbar User Guide

Getting Started

You can access the features of your business VoIP phone from a set of toolbars in Microsoft Outlook (version 2000 and higher), Microsoft Internet Explorer (version 6 and higher), or Mozilla Firefox.

Opening Toolbars

- Open Microsoft Outlook, Microsoft Internet Explorer, or Mozilla Firefox.
- Right-click in the toolbar area, and then click **Telephony Toolbar Call Control** and **Telephony Toolbar Services**.

Logging In

- In the Telephony Services toolbar, click **Log in** . The **Log in** button turns green  and other buttons and features on the toolbars become active.

Setting Your CommPilot Express Status

- After logging in, select the appropriate status from the CommPilot drop-down list. You must configure each of these statuses (see “Setting Up Your CommPilot Profiles”).


Managing Incoming and Outgoing Calls




The Telephony Call Control toolbar provides basic features for managing your incoming and outgoing calls. When using the Telephony Call Control toolbar in Outlook, the Call Lines list displays



- Name of the other party (internal calls)
- Number of the other party
- Current status of the call

Answering Calls

To answer an incoming call, click the **Answer** button  .

To end the current call, click the **End** button  .

Placing Calls on Hold

- To place an active call on Hold, click the **Hold** button .
- To take a call off of Hold, click the **Answer** button .

Making Calls

From the Call Control Toolbar


Click the Dial Number field, type the number to dial, and then press **Enter**. Or select an extension or phone number from the Dial Number drop-down list, which shows the last ten extensions/phone numbers you have dialed.

Web Pages/Email

On a web page or e-mail (formatted in HTML), select the number to dial, right click, and then click **Dial**.

Outlook Contacts

1. Select the contact to dial, then on the Call Control toolbar click **Dial Contact**.
2. Click the phone number that you want to dial.


Note: Do not use the Dial Contact feature from Outlook (available from the toolbar  or when right-clicking a contact) when attempting to dial a contact. This is a different feature that will not work with the toolbar.

Transferring Calls

There are two ways to transfer an active call in the toolbar:

- **Supervised (Warm) Transfer:** You speak with the other party before transferring the caller on hold.
- **Voice Mail Transfer:** Transfers the caller to your voice mail box.


Supervised (Warm) Transfer

1. While on a call with the party to transfer, type the extension or phone number that you want to transfer the party to in the Dial Number field. This places the original party on hold.
2. Announce the call to the new party.
3. Click the Transfer button .

Transferring Calls to Voice Mail

While on an active call, click the **Voicemail Transfer** button 


Call Forwarding


You can have all calls to the primary line on your Network Phone forwarded to a phone number or extension you select. To turn on Call Forwarding, click the **Call Forward Always** button . If you haven't configured Call Forwarding yet, click **On**, type the number to forward calls to in the Calls Forward to field, and then click **OK**. If you want your phone to play a reminder tone when a call is forwarded because Call Forwarding is enabled, click the **Play Ring Reminder** when a call is forwarded box.

To turn off Call Forwarding, click the **Call Forward Always** button  again.

Do Not Disturb (DND)


When you turn on the DND feature, incoming calls will not ring on your Network Phone and callers will be forwarded to your voice mail.

To turn on the DND feature, click the **Do Not Disturb** button . If you want your phone to play a reminder tone when a call is forwarded to voice mail because of DND, click the **Services** button, click **Do Not Disturb**, and click the **Play Ring Reminder when a call is forwarded** box.

To turn off the DND feature, click the **Do Not Disturb** button  again.

Three-Way Conference Calls

You can initiate a conference call with up to two other participants.

1. While on a call with the first party, type the extension or phone number for the second party in the Dial Number field, and then press **Enter** to dial the party.
2. Click the **Conference** button  to join all parties on the line.

Anonymous Call Rejection

When this feature is enabled, your Network Phone will reject callers who have restricted their number from displaying on caller ID.

To set up anonymous call rejection for your Network Phone:

1. Click the **Services** button.
2. Click **Anonymous Call Rejection**.
3. Click **On** to enable the anonymous call rejection feature.
4. Click **External Calling Line ID Delivery**.
5. Click **On** to enable external calling line ID delivery.
6. Click **OK** to save the change.

Blocking Your Caller ID



You can block your caller ID from displaying when you make calls to parties outside your dealership.

To set up automatic callback for your Network Phone:

1. Click the **Services** button.
2. Click **Calling Line ID Delivery Blocking**.
3. Click **On** to enable the caller ID blocking feature.
4. Click **OK** to save the change.

Call Waiting



When this feature is enabled, you can pick up incoming calls when you are already busy with another caller. If another call arrives while you are already busy on the line, you will hear a short tone to notify you of the other call.

To turn off call waiting for your Network Phone:

1. Click the **Services** button.
2. Click **Call Waiting**.
3. Click **Off** to disable the call waiting feature.
4. Click **OK** to save the change.

Simultaneous Ringing



With the Simultaneous Ringing feature, you can configure additional phone numbers (e.g., your home or mobile number) to ring when a client calls your Network Phone. You can pick up the call on any of the ringing phones.

To set up simultaneous ringing for your Network Phone:

1. From the Telephony Services toolbar, click **Services**.
2. Click **Simultaneous Ringing**.
3. Select the option for how to handle incoming calls:
 - Don't ring Simultaneous Ring Numbers if I'm already on a call
 - Ring all my Simultaneous Ring Numbers for all incoming calls.
4. Click **Add**, type the phone number you want to ring simultaneously with your Network Phone, and then press **Enter**.
5. If you want to hear a confirmation message, which also requires you to press any key on your phone to pick up the call, click to select the **Answer Confirmation** box for the phone number. This helps prevent an answering machine or voice mail system on another line from intercepting the call.
6. Click **On** to enable the simultaneous ringing feature.
7. Click **OK** to save the changes to the configuration.

Remote Office



If you need to work from home or any other remote place, you can set your Phone to go into Remote Office mode. After setting up the remote number, you can manage all incoming and outgoing calls through your remote business phone just as if you were at your desk using your Phone.

To set up remote office for your Network Phone:

1. From the Telephony Services toolbar, click **Services**.
2. Click **Remote Office**.
3. Click **On** to enable the remote office feature.
4. In the Remote Office Number field, type the phone number you want to act as your remote office number.
5. Click **OK** to save the changes to the configuration.

Integrated Messaging



With Integrated Messaging, you can have your voice mail messages delivered as attachments to the email address of your choice, where you can then listen to the messages through your computer and easily forward them to others via e-mail.

To set up integrated messaging for your Network Phone:

1. From the Telephony Services toolbar, click **Services**.
2. Click **Voice Messaging**.

3. Ensure that **On** is selected.
4. Ensure that the **Use unified messaging** box is selected.
5. Click the **Notify me by e-mail of the new voice message** box, and then in the field type the e-mail address to receive a notification of new voice messages.
6. If you want to your callers to be forwarded to a specific phone number when they press 0, click the **Transfer on '0' to Phone number** box, and then type the phone number to forward the caller to in the field.
7. Click **OK** to save the changes to the configuration.

Setting Up Your CommPilot Profile



You can use the CommPilot Express feature to set a profile for your current status. For each status, you need to set up a profile that tells your phone how to handle calls during this time.

To set up the different CommPilot profiles for your Network Phone:

1. From the Telephony Services toolbar, click **Services**.
2. Click **CommPilot Express**.
3. From the Current Profile drop-down list, select the profile you want to configure, and then click that same status from the menu tree at the left.
4. Configure the options for each profile as follows, and then click **Apply**:
 - **Available-In Office**: Set a simultaneous ring number (if desired), and then define how you want to forward busy and no answer calls.
 - **Available-Out of Office**: Define how you want to forward calls and if you want to receive an e-mail notification of all incoming calls while in this status.
 - **Busy**: Define any special phone numbers that you want forwarded to a specific number (instead of voice mail) and if you want to receive an e-mail notification for all new voice mail messages received.
 - **Unavailable**: Define any special phone numbers that you want forwarded to a specific number (instead of voice mail) and which greeting is used for callers that are forwarded to voice mail.

Viewing Call History



The Call History view shows the latest calls that you missed, received, and dialed. Entries display the other party's name (if available), the party's number/extension, and the date/time you missed, received, or made the call.

Viewing Call History

From the Telephony Services toolbar, click the **Call History** button.


Dialing Entries in the Call History

Click the phone number or extension you want to dial.

Using the Group Directory

The Group Directory lists all of the phone users in your group.

Viewing the Group Directory

From the Telephony Services toolbar, click the Group Directory  button.

Dialing Entries in the Group Directory

Click a phone number or extension in the Number or Extension cell for the entry.

Sorting Entries in the Group Directory


Click the column you want to sort by; click the column header again to sort in descending order. The default sort order is ascending by Name.

Searching the Group Directory/Outlook Contacts

On the Telephony Services toolbar, type a name or number in the Search box, then press **Enter**. The Search Results page displays the results of the search.

Setting Up Outlook Integration

The Outlook and Internet Explorer Assistant Toolbar, by default, is configured to integrate with Microsoft Outlook, but you can adjust the default settings as needed. To view and/or adjust your Outlook integration settings:

1. From the Telephony Services toolbar, click **Options** .
2. Click **Outlook Integration**. If you want the Assistant Enterprise to integrate with Outlook, check the Enable Outlook Integration box.
3. Click **Contacts**. If you enabled Outlook integration, you can adjust the following settings:
 - **Contact Retrieval:** Select whether you want the Assistant Enterprise to retrieve contacts from Outlook's default contact folder only or if you want the Assistant Enterprise to retrieve contacts from all folders in Outlook.
 - **Contact Lookup:** If you want the Assistant Enterprise's caller ID to use the names in Outlook (if available) instead of other available caller ID information, check the box.
4. If you made any changes to the Outlook integration settings that you want to save, click OK.