

User Manual Zultys Outlook Communicator V.3

Author: Zultys Technical Support Department

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Revision History

Date/Revision	Comments
October 2022/1	New template

1 Overview

1 Introduction to Zultys Outlook Communicator

1.1 Feature Description

Companies that have installed a Zultys MX IP phone 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

Following requirements must be met for Zultys Outlook Communicator to function properly:

- The agent's computer is running Microsoft Windows 7, Windows 8 , Windows 10.
- A 32-bit or 64-bit version of Microsoft Outlook 2007 Service Pack 2, Outlook 2010, Outlook 2013, Outlook 2016, Outlook 2019, O365 Outlook is installed.
- *Zultys Outlook Communicator Adapter* software is installed.
- Zultys Outlook Communicator license is present on the MX.
- The MX system is running Release 7.0 or above.
- The user has Desktop Integration option enabled in their Profile in MX Administrator.
- Install a digital security certificate on MX via Maintenance | Security Certificate Management.
- Required TCP/IP ports are 7778, must be open for inbound connections.
- Digital Security Certificate installed on the MX

The following MAPI providers also are supported: Microsoft Exchange 2003/2007/2010, O365 both cached and non-cached, and PST.

1.3 New Features in Zultys Outlook Communicator Adapter V.3

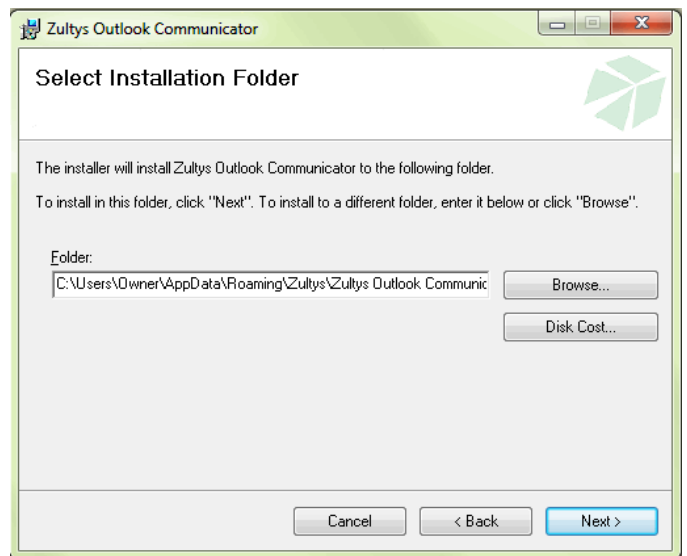
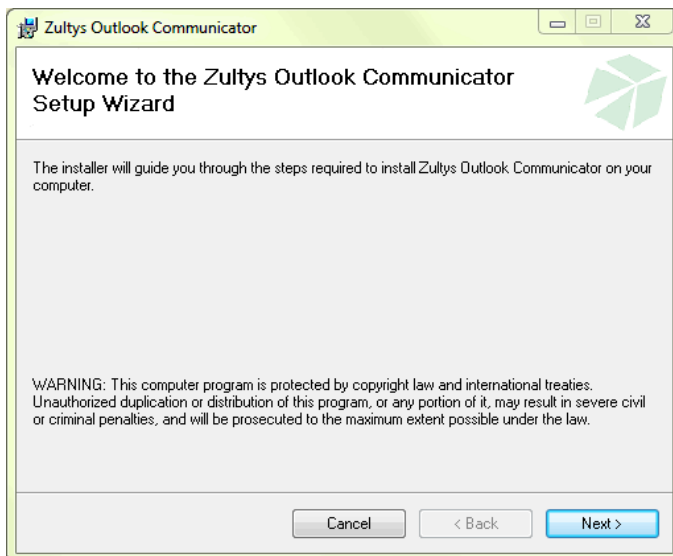
- Support for Windows credentials login

1.4 Installation of Zultys Outlook Communicator Adapter

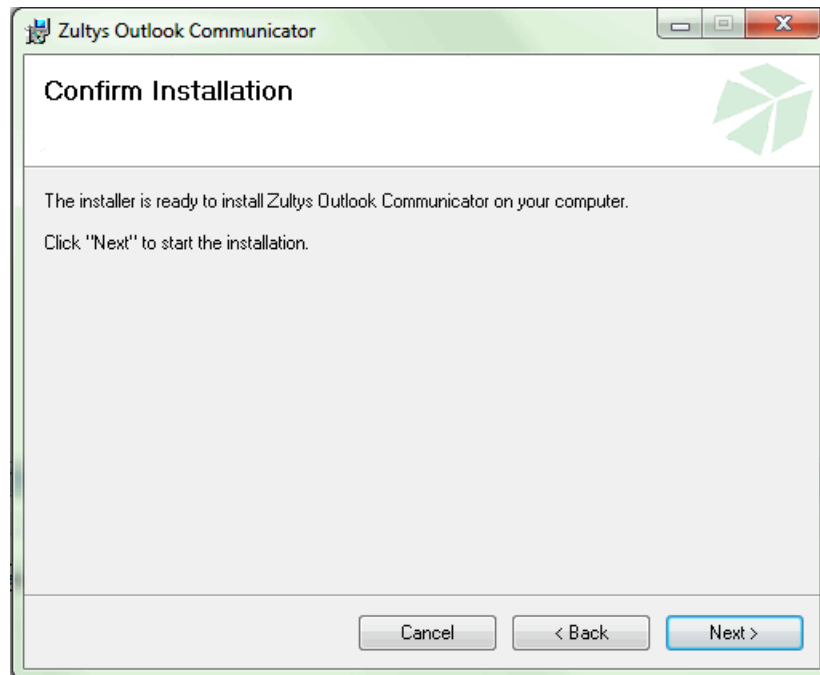
1. Microsoft Office is available in both 32-bit and 64-bit versions. Download the appropriate Zultys Outlook Communicator Adapter setup software for the Outlook version being used. This determination is independent of the version of Microsoft Windows you are using whether 32-bit or 64-bit. The adapter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

A **Select Installation Folder** window opens. Use the default folder location or browse to a different folder.

5. Click on the **Next** button.

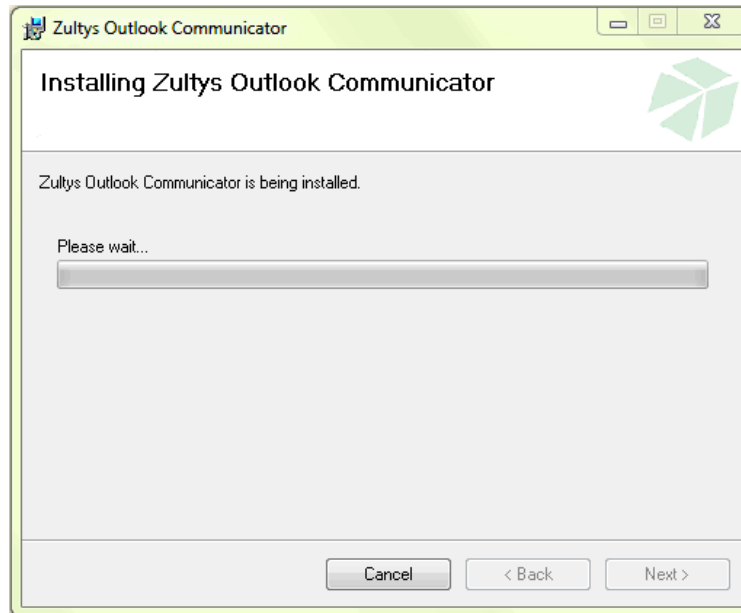


6. A **Confirm Installation** window opens.

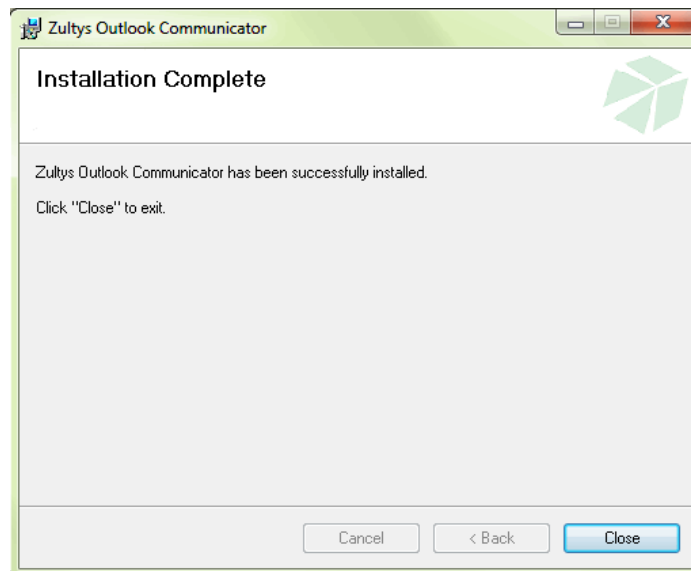


7. Click on the **Next** button.

8. The installer will install the Zultys Outlook Communicator adapter.



9. An **Installation Complete** window opens.



10. Click on the **Close** button.

1.5 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 keyboard input.

When installing Zultys Outlook Communicator on end users Windows PC, the MX must have been set up properly as well.

1.6 Installing Outlook Communicator license

1. Open MX Administrator and log-in
2. Go to Maintenance and select Software Licenses
3. Enter License
4. Copy the text file representing your Desktop Integration license and paste it into the window
5. Click OK
6. Confirm that the license list is correct
7. Click OK

1.7 Digital Security Certificates

Zultys Outlook Communicator clients use a Transport Layer Security (TLS) secured connection between the Outlook Communicator and your MX. A digital security certificate is required to enable a connection to the MX. A security certificate is a digital document assuring users that their transmission is encrypted, secure and connected to the right server, and it also informs the company that the callers are who they claim to be.

If that certificate has been signed and approved by an independent certification authority (CA) then the Zultys Outlook Communicator software accepts the two endpoints as legitimate and proceeds with the connection.

Alternatively, the digital security certificate can be self-signed by the company and not validated by a third-party certification authority. In essence, a self-signed certificate conveys the message, "You can trust me", but forces the user to acknowledge and accept that trust whenever connecting to the phone system.*

* Optionally, you can e-mail to the user a copy of the certificate and have the user install it on their Outlook Communicator. In so doing, the Outlook Communicator will confirm the MX server's identity eliminating this step for the user. Please refer to your

Outlook product documentation for further details of how to store a self-signed certificate.

Of the two types of certificates, the third-party certificate from a certificate authority is preferred.

Section 2.3 describes how to generate a security key

Section 2.4 describes how to generate and install a self-signed certificate

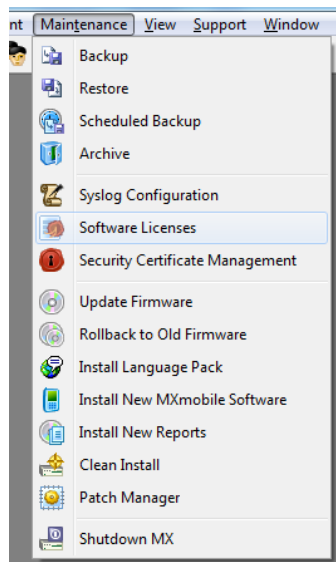
Section 2.5 describes how to generate a request for a certificate from a certificate authority

Section 2.6 describes how to install a certificate received from a certificate authority.

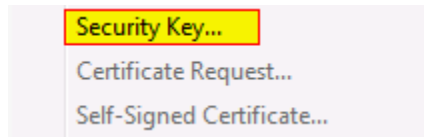
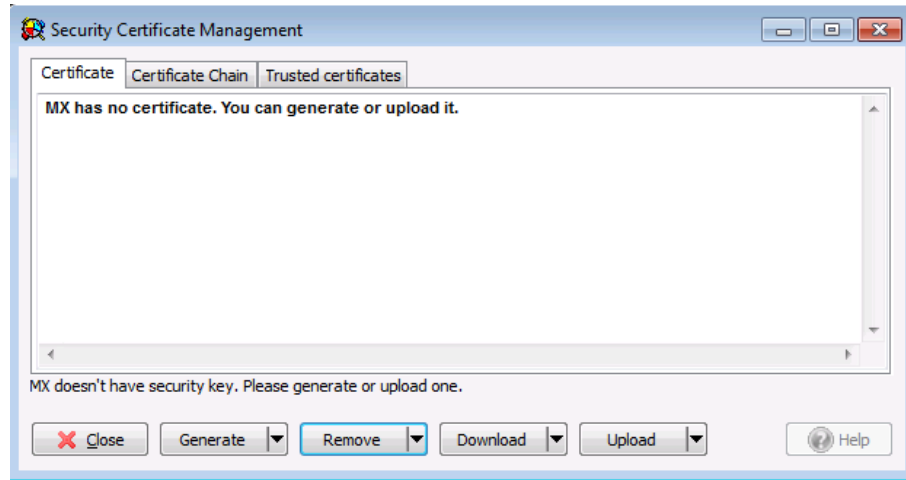
1.8 Generating a Security Key

Generating a security Key is a precursor to generating any one of the certificate types.

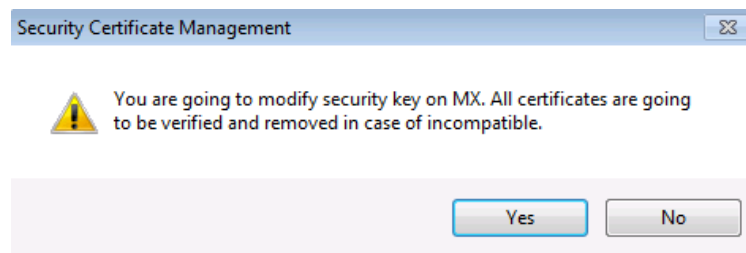
1. Go to Maintenance | Security Certificate Management.



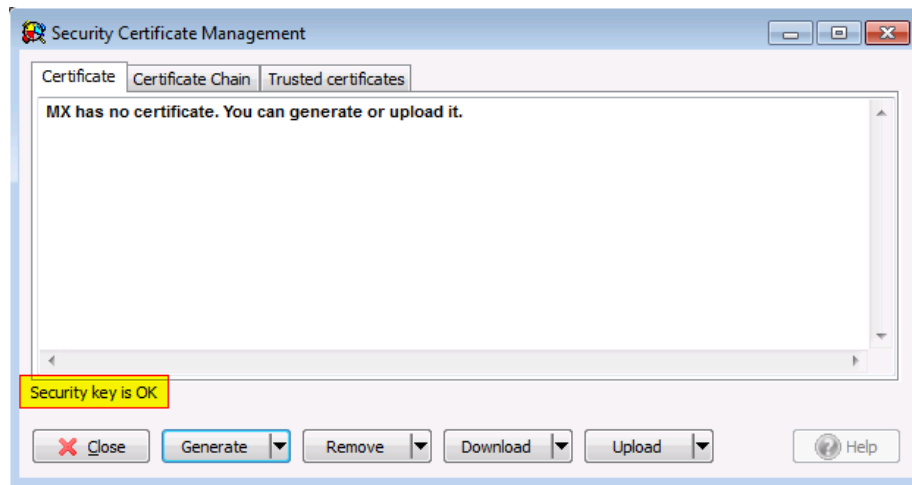
2. Click on *Generate*, and select *Security Key* from the dropdown list.



3. Click OK to the following popup message.

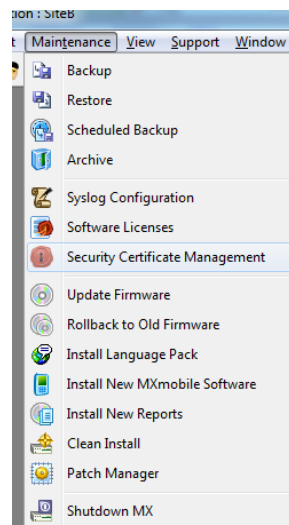


4. Verify Security Key is successfully installed.
Once the Key is generated, the screen will update to reflect this information.

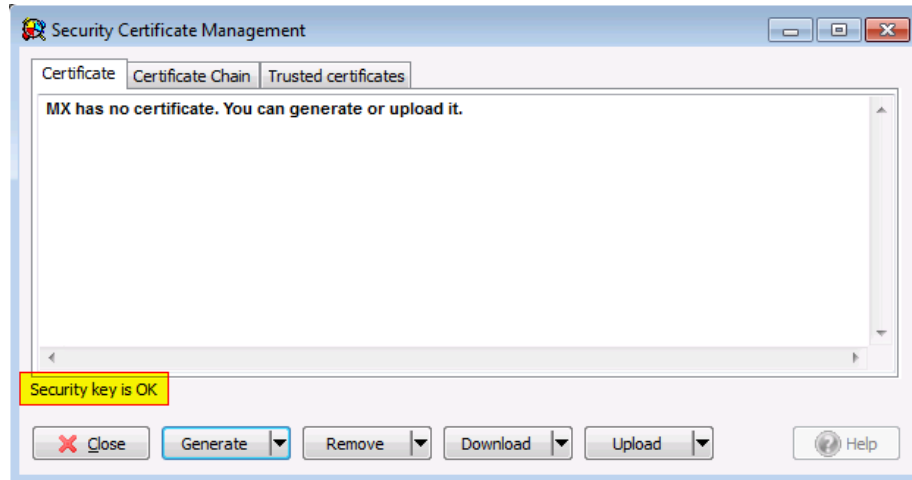


1.9 Generate and Install a Self-Signed Certificate

1. Go to Maintenance | Security Certificate Management.



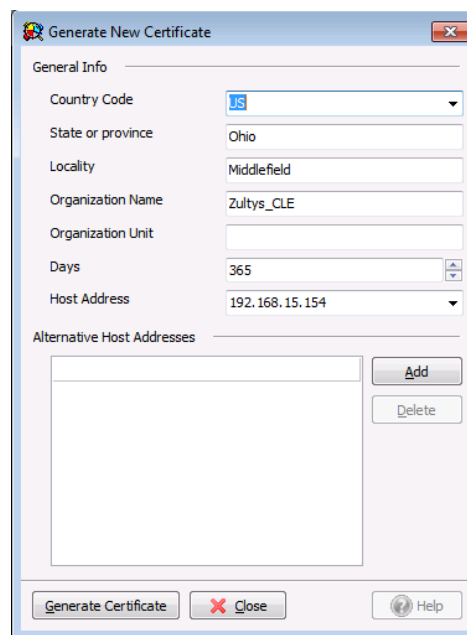
2. Generate Certificate.



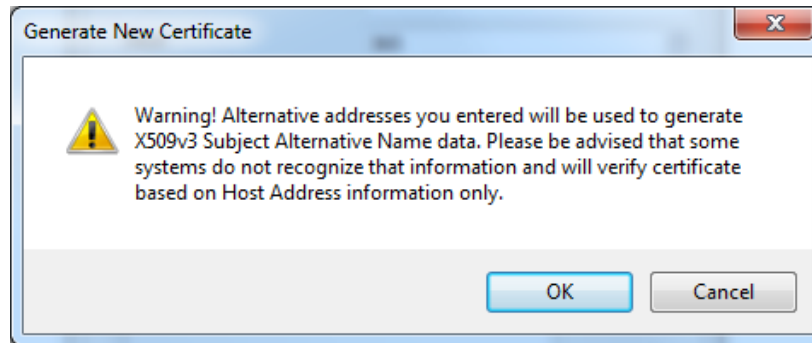
3. Click on *Generate*, and select *Self-Signed Certificate* from the dropdown list.



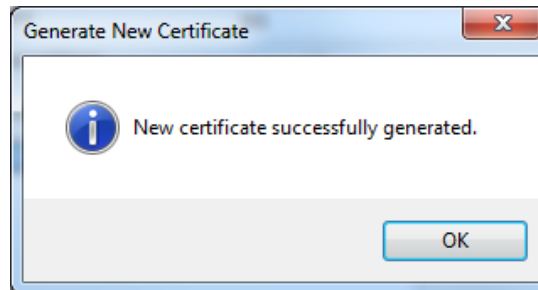
4. Fill in the necessary information.



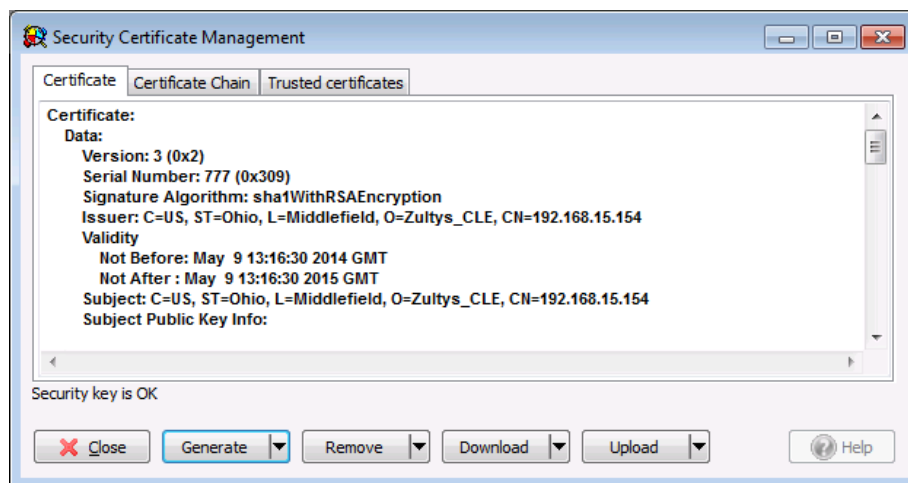
5. Click *Generate Certificate*.
6. Click *OK* to the warning popup up message.



7. Click OK to the confirmation popup message.

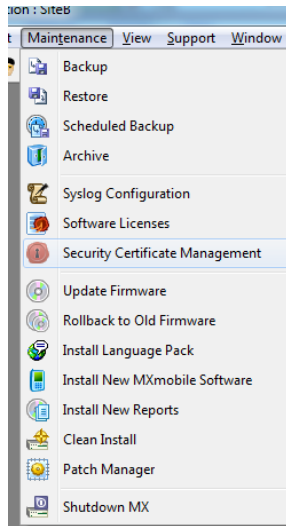


8. Click Close.

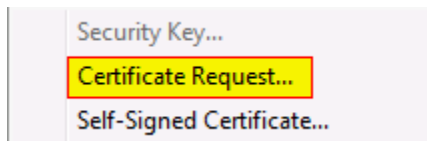
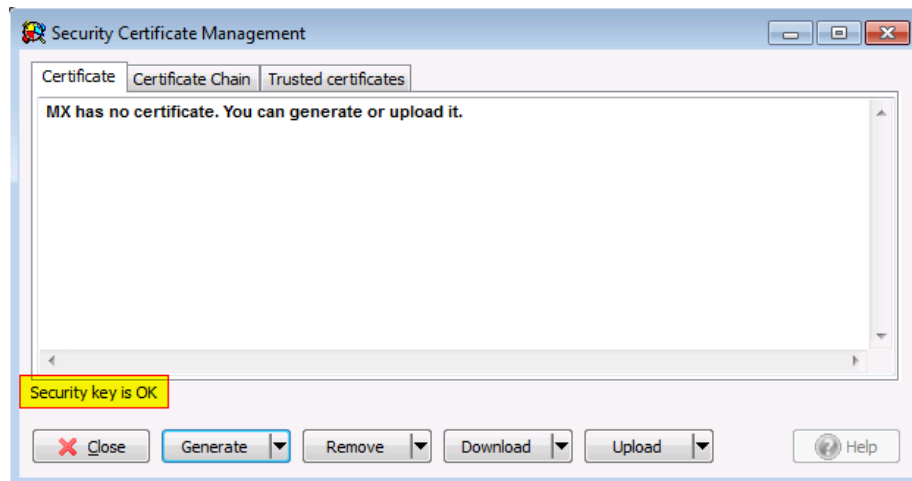


1.10 Generate a Request for a Certificate from a Certificate Authority

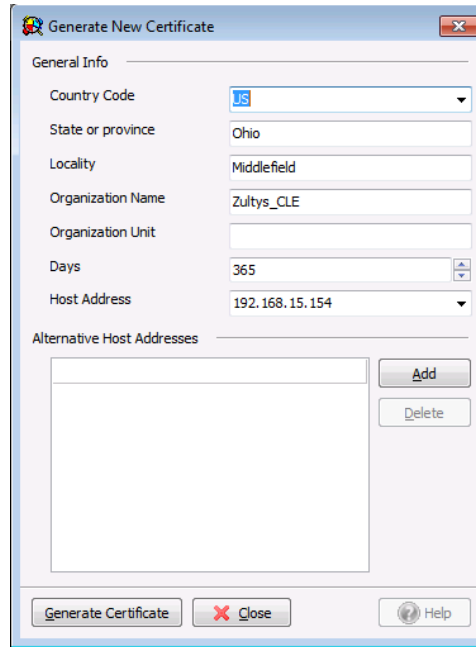
1. Go to Maintenance | Security Certificate Management.



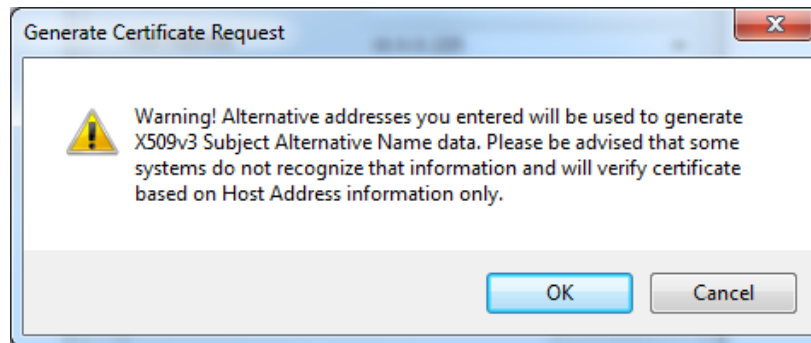
2. Generate a *Certificate Request*.



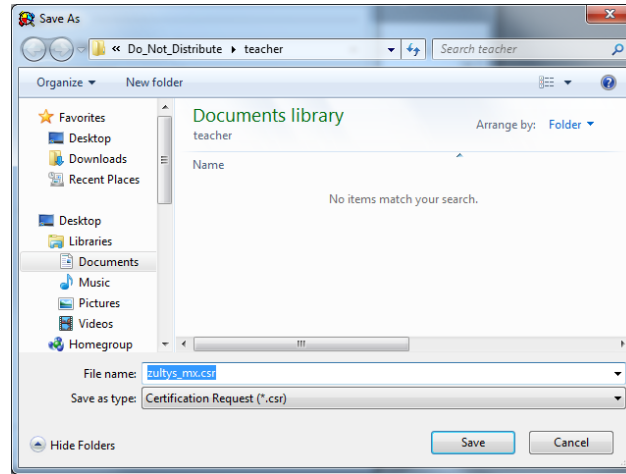
3. Fill in the necessary information.



4. Click on *Generate Request*.
5. Click ok to the warning popup.



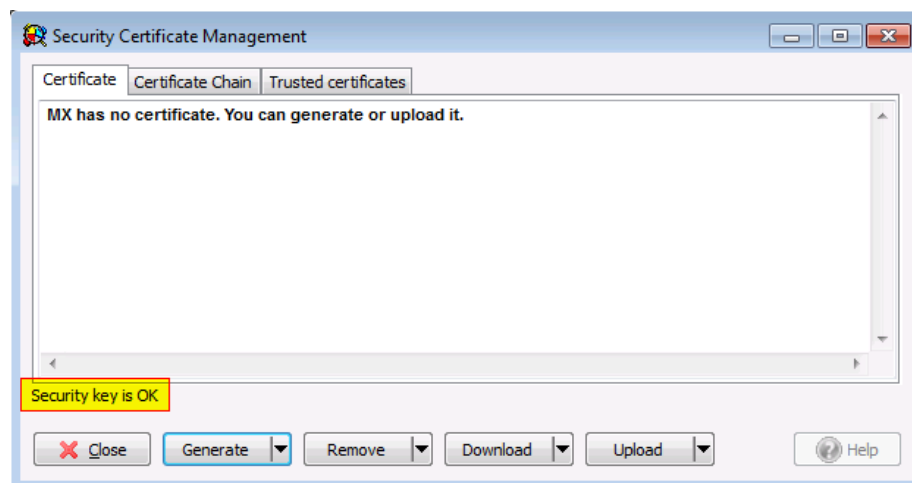
6. Save the generated Certificate Request.



7. Purchase a certificate from a Certificate Authority online. When requested, upload the above CSR file.
8. The certificate authority will issue a certificate based on the request file provided.

1.11 Install a Certificate from a Certificate Authority

1. Go to Maintenance | Security Certificate Management.



1.11.1 Upload | Certificate

1. Navigate to certificate file location and select the file.
2. Certificate will be displayed. Check that the data shown is correct.
3. If required, upload a certificate chain

1.11.2 Upload -> Certificate Chain

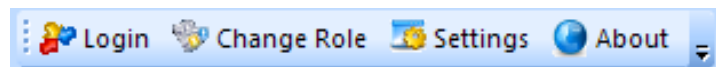
1. Navigate to certificate file location and select the file.
2. Outlook Communicator connectivity is now enabled.

1.12 Enabling Users

1. Go to Configure | Users
2. Select a User.
3. Click the Profiles button.
4. Check the Enable Desktop Integration item located in the General tab.
5. Repeat for each User Profile that is related to a User requiring Outlook Communicator access.
6. Ensure a User Profile with Outlook Communicator enabled is set for each user requiring Outlook Communicator access.

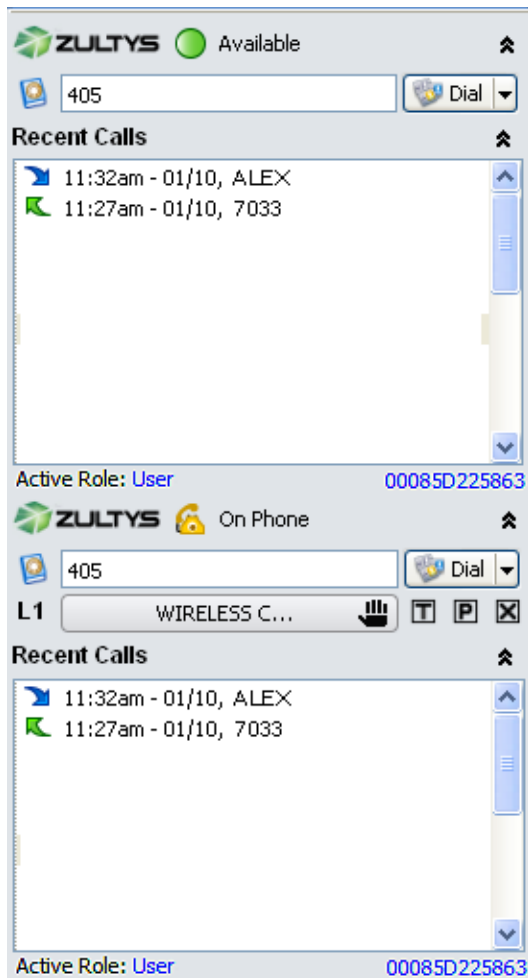
2 Zultys Outlook Communicator Interface

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



Clicking on the **MX Communicator** tab allows an agent to perform an *MX Login*, *MX Logout*, set *Settings*, *Change Role* the user is currently logged in under, and obtain information about the Zultys Outlook Communicator version currently being used.

In addition to the *MX Communicator* tab, *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 phone system, and displays line and Caller ID information.



User's current *Active Role* and *Bound Device* or *Phone Number* are displayed at the bottom of the pane.

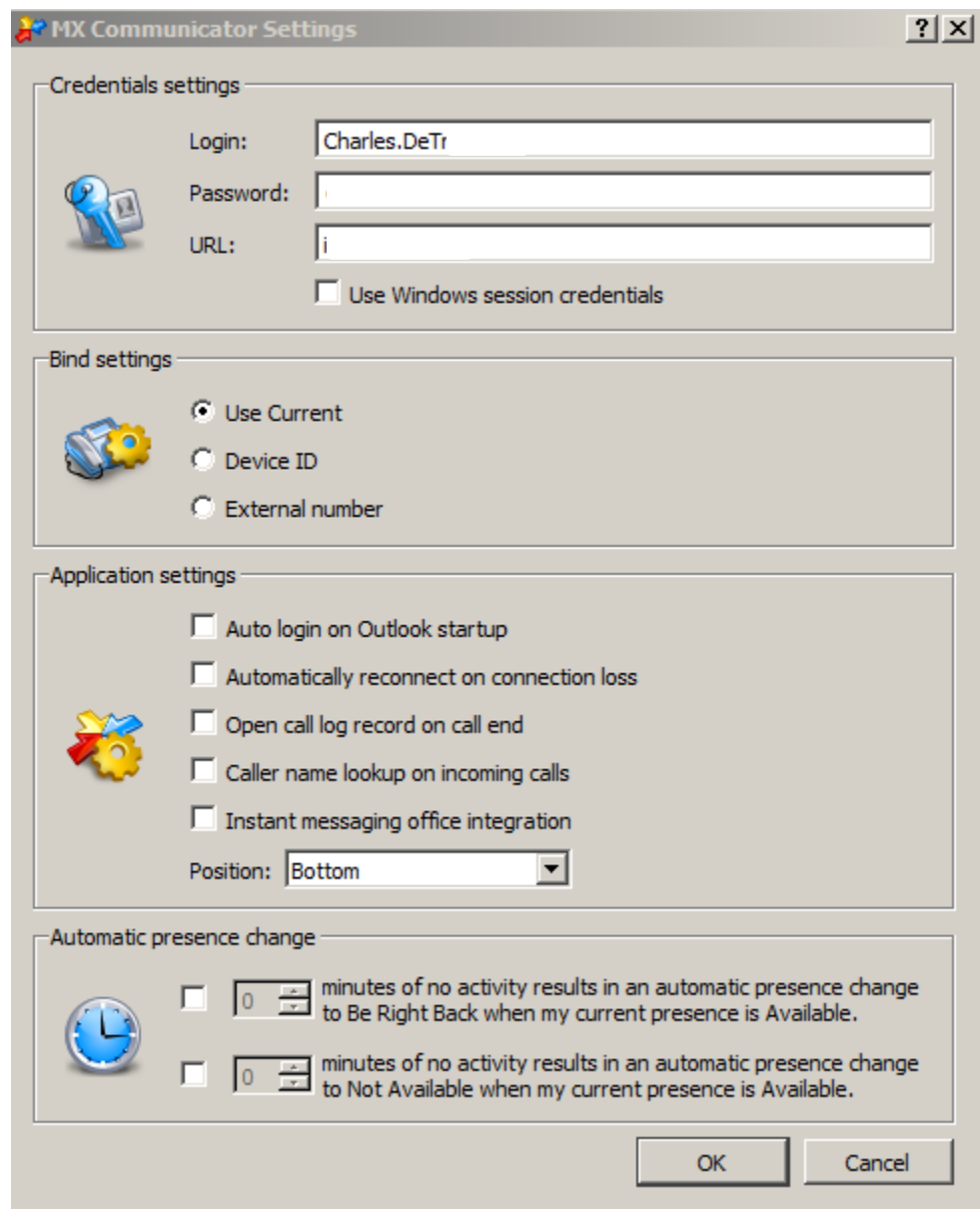
The size of the *Zultys Outlook Communicator's Control Pane* can be changed by clicking on the top or right border of the pane and dragging it.

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. You may also check Use Windows session credentials to utilize your Windows username/password for login.
4. In the *Bind Settings* block, select the option for your bound device. *Use Current* keeps the existing binding from the agent's MXIE client. If *Device ID* or *External Number* is selected, valid device ID or phone number must be entered below for the binding to be completed.



5. In the *Application Settings* block, click on the checkbox next to each applicable option to enable it.
6. In the *Automatic Presence Change* block, enter the time interval of agent inactivity that will trigger Be Right Back and Not Available status changes. The checkbox next to the timer enables the automatic presence change.

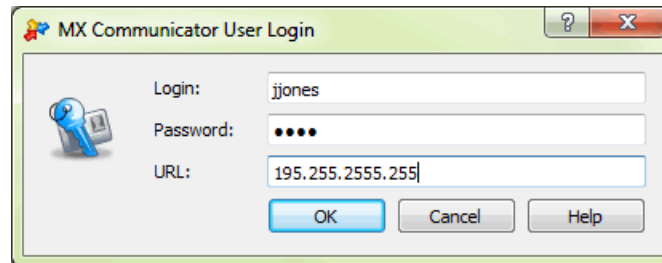
7. Click on the **OK** button.

4 Zultys Outlook Communicator Login to MX

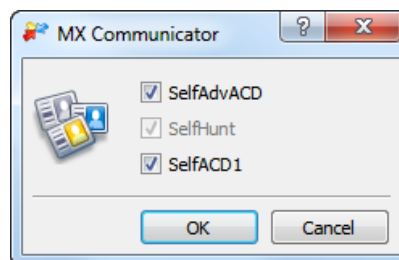
1. Under the *MX Communicator* tab, click on the *Login* icon.



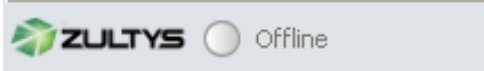
2. An *MX User Login* window opens.



3. Change any data, as applicable
4. Click on the **OK** button.
5. An *MX Communicator* window opens.



6. Select the checkboxes for roles to login as
7. Click on the **OK** button.
8. 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.

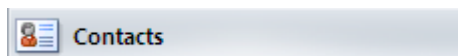


6 Making an Outbound Call Using Zultys Outlook Communicator

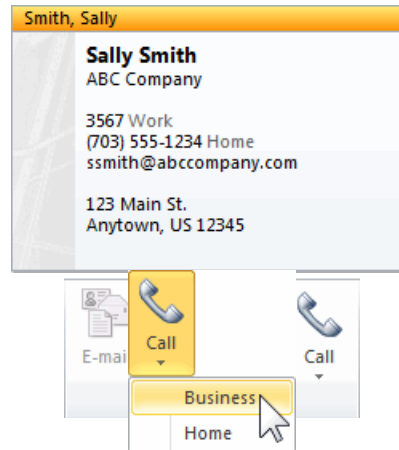
6.1 Calling from the Outlook Contacts Folder

NOTE: To make calls from the Outlook Contact Folder, the format of a phone number stored in Outlook must conform to a dial plan configured for the MX system. Contact system administrator if calls from Outlook Contacts Folder fail.

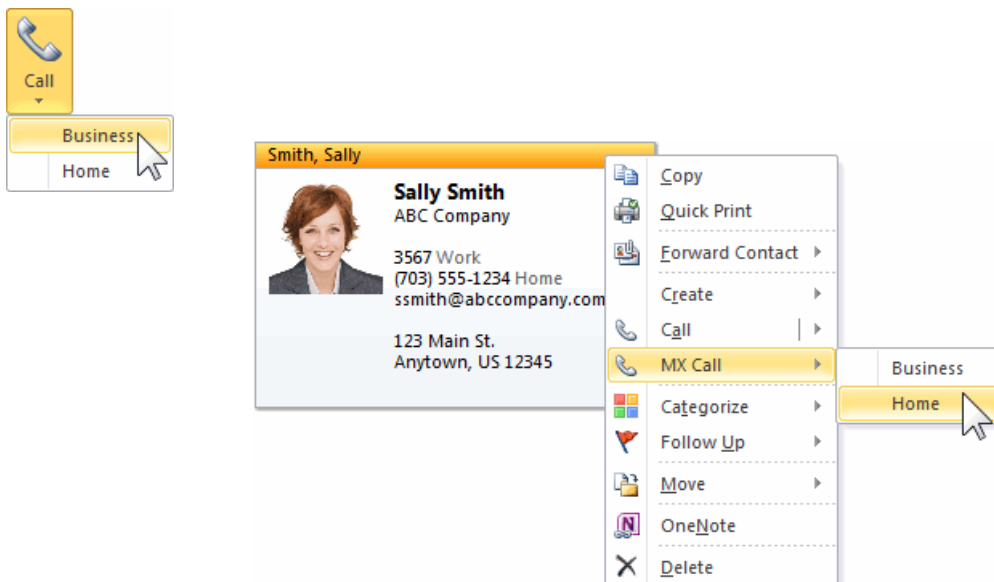
1. Click on **Contacts** to display the Microsoft Outlook **Contacts** folder.



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.



Alternatively, right-click on the contact being called.

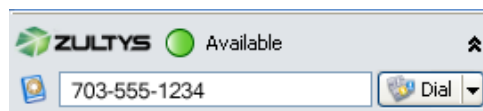
5. From the dropdown menu, select *MX Call*.
6. From the second dropdown menu, select the phone number being called.

6.2 Calling from the Dial Window

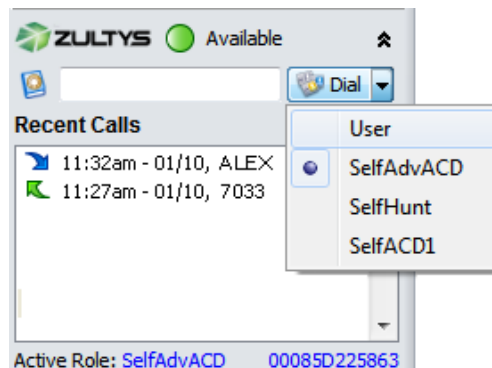
1. The dial window is located in the *Zultys Outlook Communicator's Control Pane*.




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



3. To switch the *Active Role* from which the call is made, right-click at the arrow near the *Dial* button or the role title at the bottom of the pane.



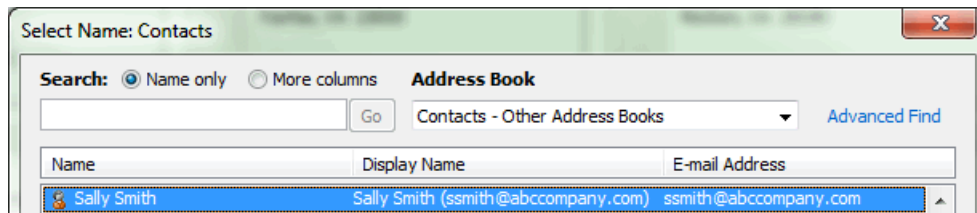
4. Drop-down popup list opens.
5. Select the required role.
6. Click on the  button.

6.3 Calling from an Address Book

1. Click on the address book button in the *Zultys Outlook Communicator's Control Pane*.



2. A **Select Name: Contacts** window opens.
3. Navigate to an address book and click on the contact being called.



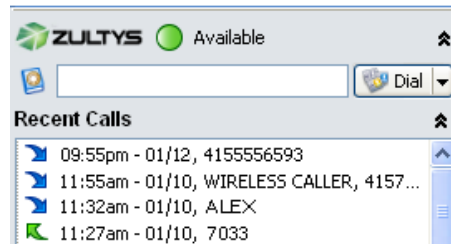
4. Click on the **OK** button.
5. The called number is inserted within the dial window.



6. Click on the **Dial** button.

6.4 Calling from the Recent Calls List

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

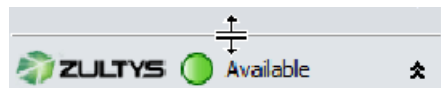


This list shows:

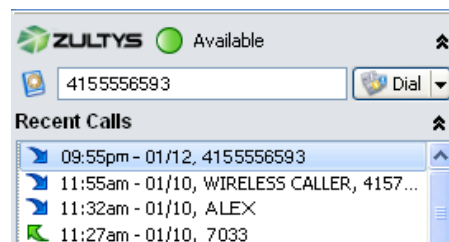
- Icon indicating call's origination - outbound or inbound, and if the call had been connected
- Time
- Date
- Caller ID
- Contact name (when available).


Typing a number into the dial window will filter the Recent Calls list by that number.

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.



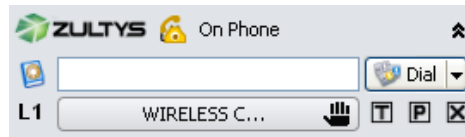
3. Click on the contact being called in the list.



4. The phone number is automatically inserted into the dial window.
5. Click on the  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.

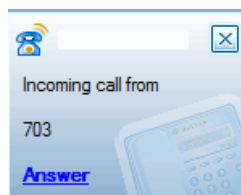


2. The agent's Presence status also changes to *On Phone*.

7 Receiving an Inbound Call in Zultys Outlook Communicator

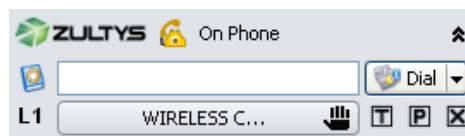
7.1 Call Notification

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

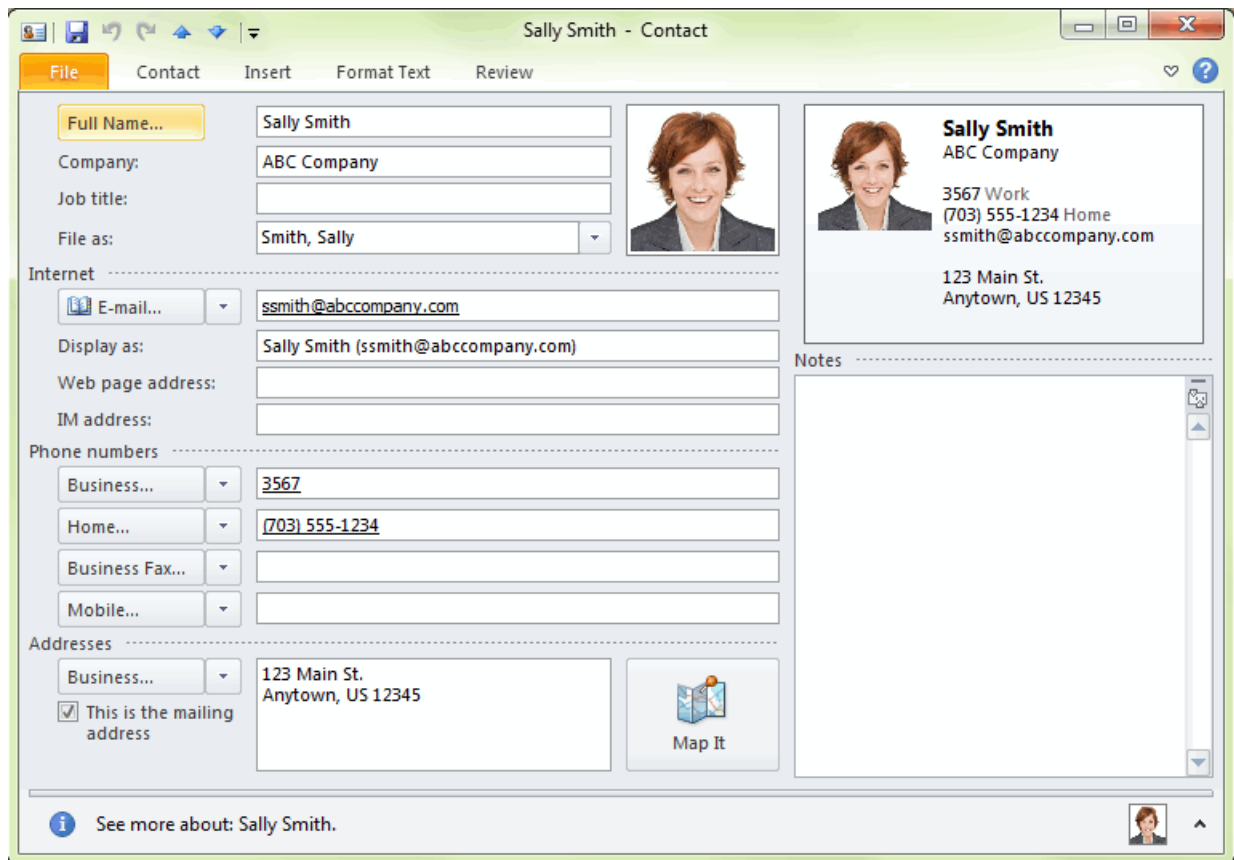
1. When the call is answered, The *Zultys Outlook Communicator's Control Pane* changes and displays the line number, the Caller ID, the contact's name and call control buttons.



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

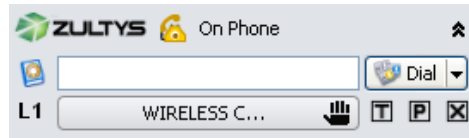
7.3 Caller's Contact Record Pop-Up

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  button becomes active and another call can be placed or answered on a different line, if desired.




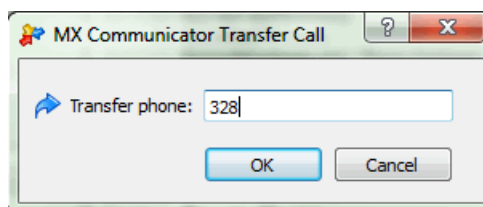
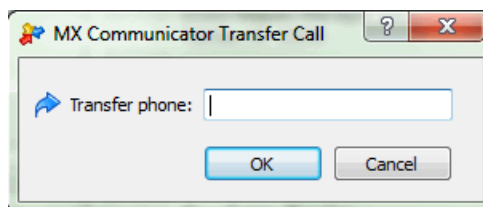
Press this icon to retrieve a call on hold.



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

To perform a blind transfer


1. Click the  button while on an active call.
2. A **Call Transfer** window opens.

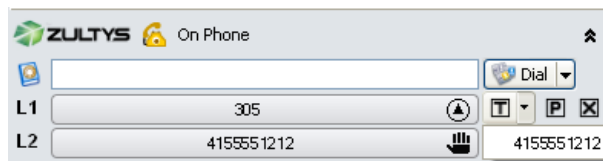



3. Enter the transfer phone number.


4. Click on the **OK** button.
5. The call is transferred.
6. The agent's Presence status changes to *Available*.

To perform an attended transfer:

1. Place an active call on hold.
2. Enter a number in the Dial Window.
3. Click on the  button.
4. Speak to the person.




5. To transfer the call on hold to the person on an active call, click on the arrow next to the  button and select the desired call from the list.
6. The call is transferred.
7. The agent's Presence status changes to *Available*.

 Press this icon during a voice call to park the call.

1. The call is parked
2. A parked call pop-up window opens revealing the retrieval number of the parked call.

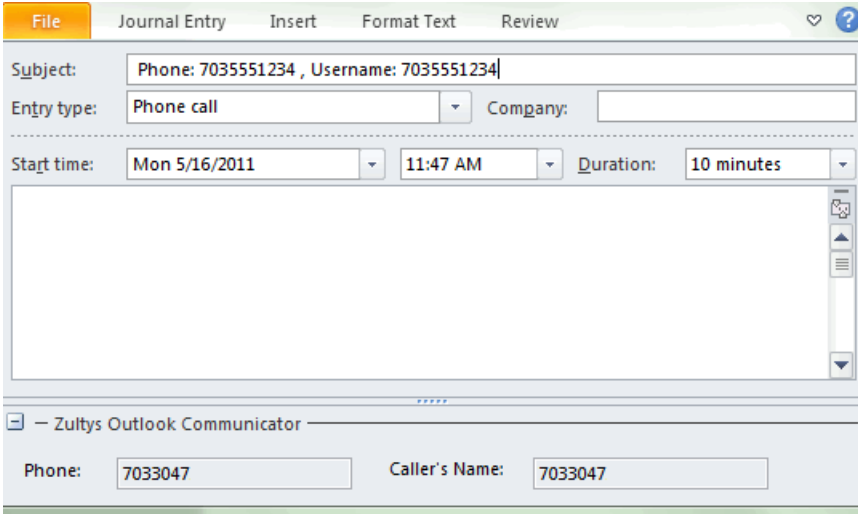


3. The agent's Presence status changes to *Available*.
4. If the parked call is not retrieved within the MX system's time parameter (typically two minutes), the call will rebound to the agent.

 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***.

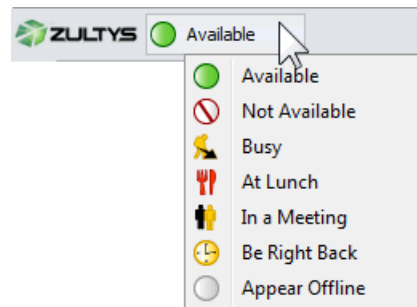


2. If the caller is in the agent's **Outlook Contacts** folder, the Journal will be saved in that contact's database.
3. If the caller is unidentified, the agent can create a new contact record and save the journal in the new contact's database.

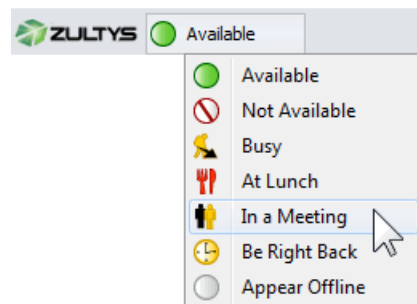
10 Changing Presence Status Indication

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

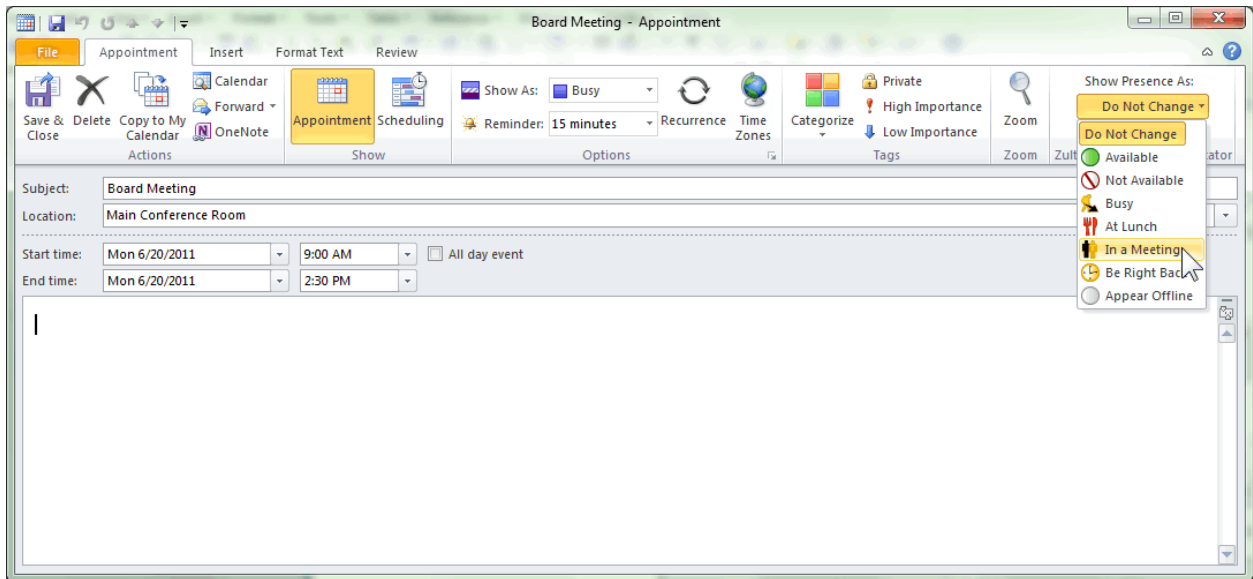


3. The Presence status is changed.

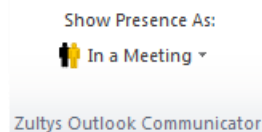


10.2 Changing Presence Using Outlook Calendar

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

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

Installer must have Microsoft operating system software install privileges.

11.2 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.

11.3 Zultys Outlook Communicator Constantly Loses Connection

Check to see if Zultys Flex Communicator is running, due to the similar design and operation of these applications, they cannot run together.

11.4 Zultys Outlook Communicator Adapter does not integrate with the MX

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

11.5 Zultys Outlook Communicator's MX Log-In Failed.

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

11.6 Zultys Outlook Communicator fails to start

Verify the Add-In is "enabled" in Outlook. In Outlook 2013 Add-Ins is located under File | Options | Add-Ins

