Packet8
Internet Phone Service

Virtual Office
Outlook Integration User Guide

Version 1.0

Introduction

What is Virtual Office Outlook Integration?

Virtual Office Outlook Integration allows subscribers to place and receive calls using their Microsoft Outlook email client. Users have the ability to select a contact and then place a call to that party either by right clicking on the contact, selecting "Packet8 Call Contact" or double clicking the contact and selecting the Packet8 tab.

When you "place" a call through your Microsoft Outlook email client, Outlook will contact the Virtual Office server and trigger it to ring the Virtual Office phone on the user's desk. The Virtual Office user picks up the phone and hears a dial tone for a few seconds while calling the remote party. The user can now hear the remote phone ringing from their desk phone.

Outlook Integration also allows Virtual Office users to see who is calling them by displaying screen pops containing the caller's contact information retrieved from any mailbox and any field (Business/Home/Mobile). If the contact is NOT found, a simple dialog showing the phone number of the person calling is displayed.

Outlook Integration allows subscribers to use their desk phone to place calls through the Microsoft Office client. However, it does NOT monitor the status of the call once the call is placed and does not provide call handling or call management.

Installation and Setup

System Requirements

This version of Virtual Office's Outlook Integration requires the following software configuration:

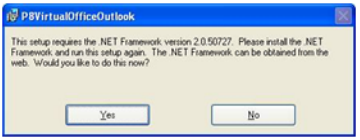
- Microsoft Windows XP SP2
- Outlook 2003
- Microsoft .NET Framework 2.0

Installing Outlook Support

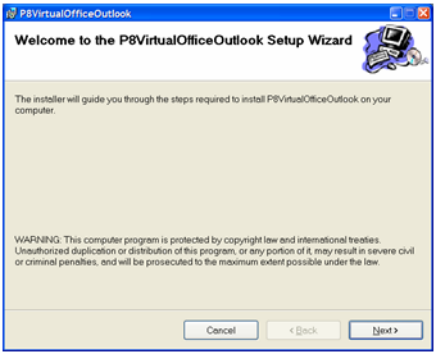
Follow the instructions below for installation of Virtual Office's Outlook Integration software.

1. Close all software applications on your PC.
2. Run the setup executable file. This file will typically be called *VirtualOfficeOutlookSetup.exe*.
3. The installation wizard will walk you through a very simple installation. Here is what you should see.

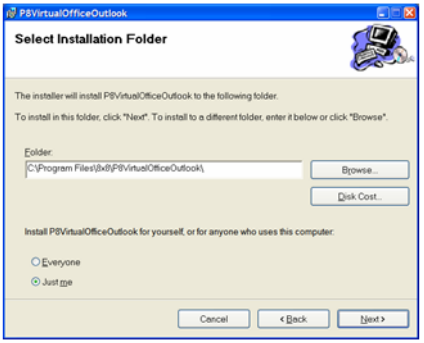
If you do not have Microsoft .NET Framework 2.0 installed, you will see the following dialog :



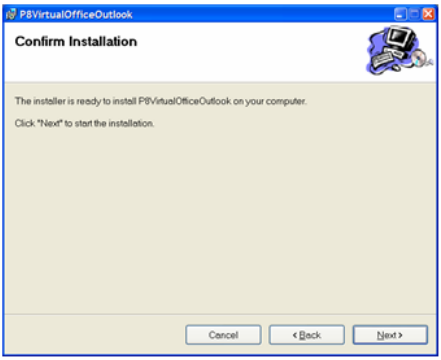
Click yes. This will lead you to the Microsoft website where you can download .NET framework 2.0 and install it.
Once you are done, click "continue" to continue the installation:



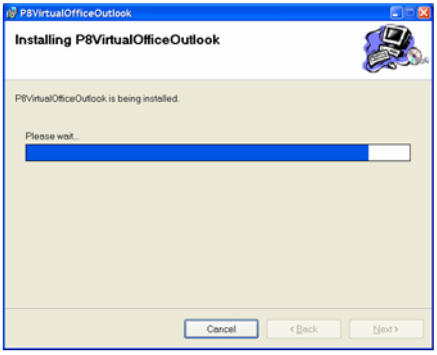
Click Next.



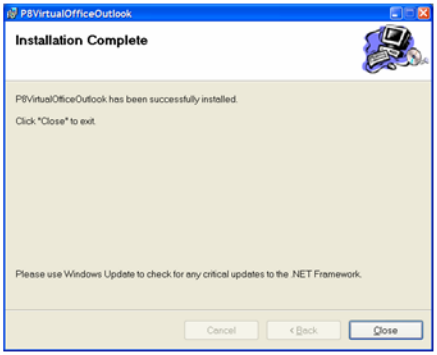
Do not change the default settings. Click next.



Click Next.



Installation is in progress.

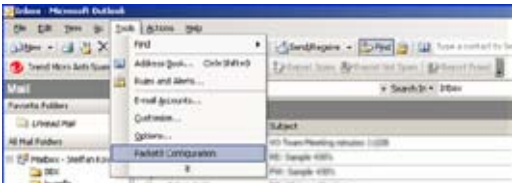


Installation is complete.

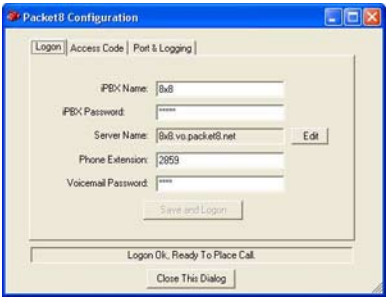
Configuring Outlook Support for Virtual Office.

Now that you have installed all the software needed to use Outlook with Virtual Office, you will need to configure it. This will tell the CTI Service how to log in (which ipbx), which extension to associate with Outlook, etc..

1. Start your Outlook Email client.

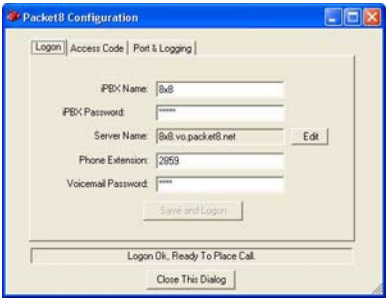


From the Tools Menu, Select Packet8 Configuration

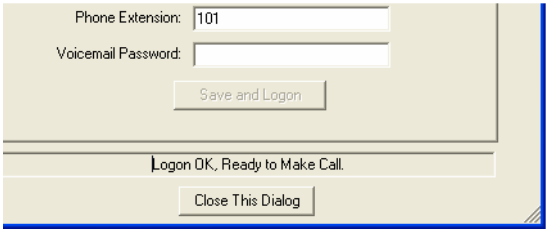


2. You will get the above dialog box.
3. Enter the iPBX Name and iPBX password. The iPBX Name and iPBX password should be given to you by your iPBX administrator. (The default password is admin)

Note: For security purposes, please change your iPBX password immediately. You can do so by logging into your Packet8 Customer Self Service Portal. Then go to "My Account," and to "IPPBX" and click on the account number. Select "iPBX Password for Outlook set up" to change your password.



4. Use the default Server name that is shown in the dialog box.
5. Enter your extension in the "Phone Extension" feld.
6. Enter your Voicemail password in the " Voicemail Password" field. (The default Voicemail password is a blank field.)
7. Click "Save and Logon."



8. You have successfully logged on. Click "Close This Dialog."

Your Outlook client is now configured to make and receive calls.

Uninstalling Virtual Office's Outlook Integration Software

To uninstall an existing version of Virtual Office's Outlook Integration software follow, the steps given below:

1. Launch the Windows Control Panel.
2. Select Add or Remove Programs.
3. Select the appropriate version of Packet8 Virtual Office Outlook Plug-in and click Change/Remove (or Add/Remove).

Using Outlook to Make and Receive Calls From/To the Virtual Office System

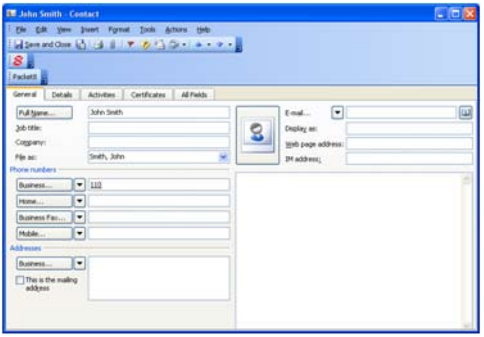
Adding contacts

By this time, you have installed and configured your Virtual Office Outlook software. When you configured the system, you associated your extension number with Outlook. The CTI Service uses this extension to make calls. It also listens for calls coming to this extension.

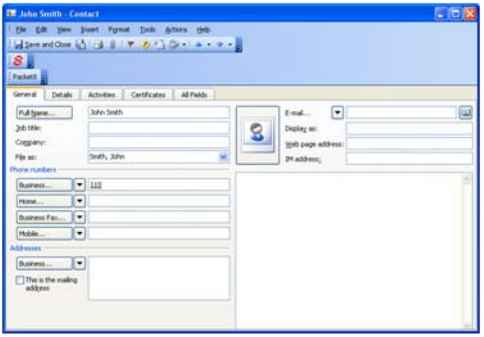
In order to test and use this system, you may want to add some contacts with valid phone numbers. Here is a suggestion:

1. Add a few extension users within this iPBX as contacts (just their extension numbers) .
2. Add PSTN numbers as contacts (e.g. cell phone).

3. Add International numbers.

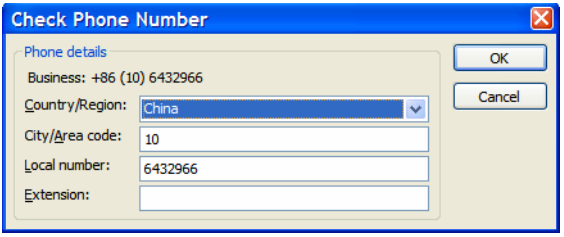


The example above shows an Outlook user as contact. Notice that the extension number is added as the Business phone number.

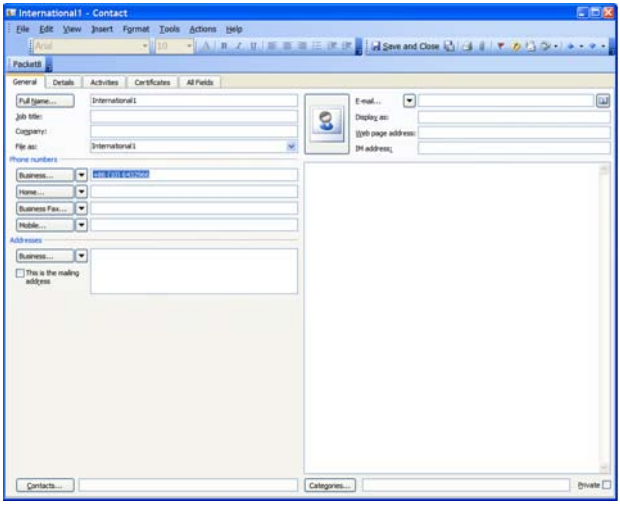


The example above shows adding a PSTN number as the contact..

To add an International number, click on the Business button. You will see the following dialog box:

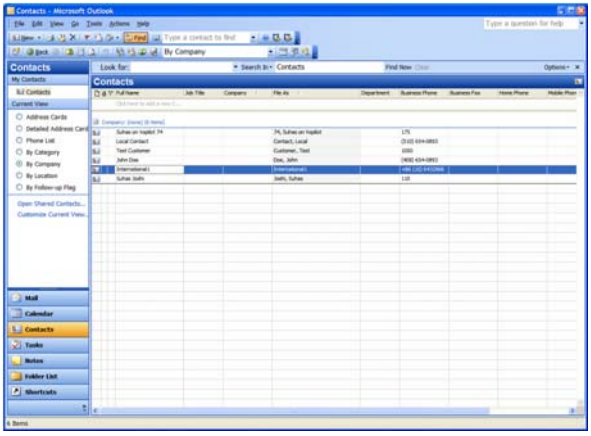


Select the country, then enter the area code and phone number.



The example above shows an International contact.

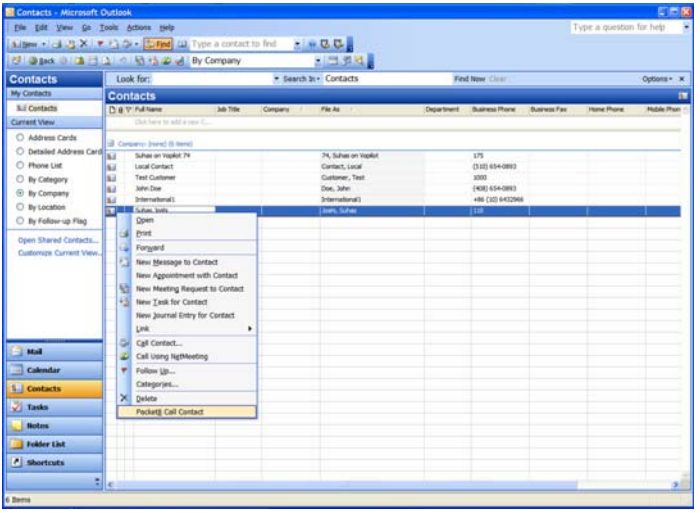
This is how your Contact table will look when you have added these different types of contacts:



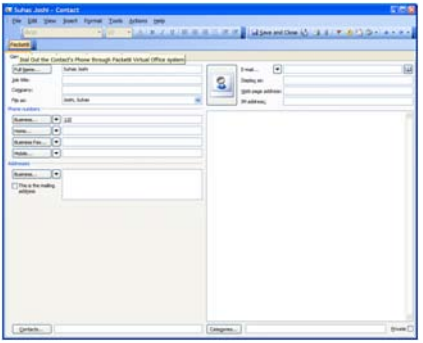
Making Outgoing Calls Using Outlook

There are two ways to make outgoing calls:

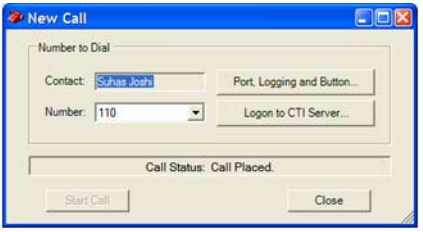
1. Using the context menu (Packet8 Call Contact) of a contact (right click on a contact).
2. Double clicking on the contact and selecting the Packet8 button on the top.



Initiating a call by using the right mouse click to display the context menu – Packet8 Call Contact.



Initiating a call by opening a contact. You should see the button "Called Packet8" on the top left.



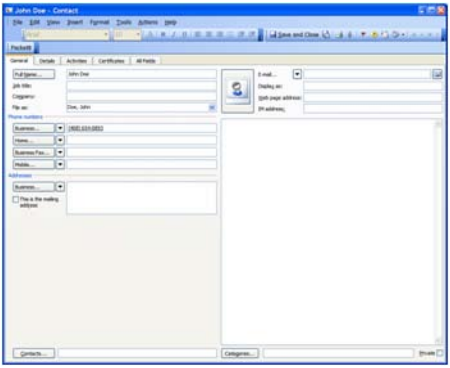
Call Placed Dialog box.

Receiving Incoming Call

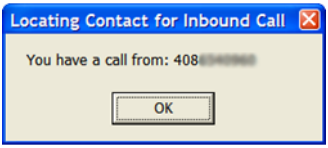
When your extension receives a call, a pop up window will appear displaying:

1. The contact information for the person who is calling you – if you have them in your Outlook Contacts.
2. A dialog box stating that an incoming call is received from (phone number) if the caller is not in your Outlook Contacts list.

You should either see the Contact pop up or a Dialog pop up.



Contact pop up when the caller is in your Outlook contact list.



Dialog pop up when the caller is not in your Outlook contact list.

Packet8®
Internet Phone Service

WARNING

Toll fraud is committed when individuals unlawfully gain access to a customers telecommunication system. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. 8x8 Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although 8x8 Inc. has designed security features into its products and services, it is your sole responsibility to use the security features and to establish security practices within your organization, including training, security awareness, and call auditing to eliminate security risks.

NOTICE

While every effort has been made to ensure accuracy, 8x8, Inc.will not be liable for technical or editorial errors or omissions contained within the documentation.The information contained in this documentation is subject to change without notice. This documentation may be used only in accordance with the terms of the 8x8, Inc. License Agreement.

Packet8

Contact Information

- http://www.packet8.net
- Customer Service: 1.888.898.8733
- Customer Service, outside the U.S.: 1.408.727.1885

Support:

- http://www.packet8.net/support
- e-mail: virtualoffice@packet8.net
- Customer Service, toll free: 1.888.898.8733
- Customer Service, outside of the U.S.: 1.408.727.1885

Packet8, the Packet8 logo, and the 8x8, Inc. logo
are registered trademarks of 8x8, Inc.
8x8, Inc. is a Nasdaq listed company, symbol EGHT.
© 2007. 8x8, Inc. All rights reserved.

8x8, Inc.
3151 Jay Street.
Santa Clara, CA 95054
Tel: 408.727.1885
Fax: 408.980.0432
www.packet8.net