



Samsung Xchange

The smarter way to do business.

Add-In Guide – Microsoft® Outlook

Version 2.4



Microsoft®
Outlook

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Microsoft® Outlook Add-In Guide

This document will guide you through configuration and basic use of Xchange’s Microsoft Outlook Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-ins. See the ‘User Guide’ for these topics.

This guide contains fairly straightforward topics and is appropriate for most end users, system administrators and installation engineers.

Duration: 15 minutes

Microsoft Outlook and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

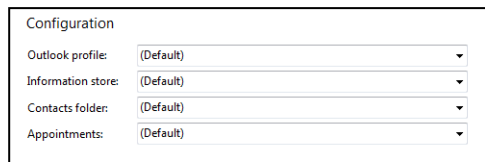
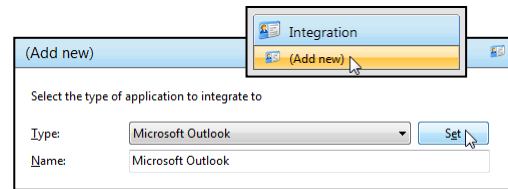
Xchange must also be installed already with the initial configuration completed. If this is not the case, please see the ‘Technical Installation Guide’ or consult your system administrator.

Information You’ll Need

- Windows account username and password
- Outlook profile information, username and password (if password protected)

Configuration

Right-click Xchange’s tray icon in the system tray menu and then left-click the ‘Configuration’ option from the menu that pops up. In the ‘Integration’ area, click the ‘(Add new)’ button, select ‘Microsoft Outlook’ from the ‘Type’ dropdown box and then click the ‘Set’ button.



On Xchange’s ‘Configuration’ group, you need to select the appropriate details from your Outlook profile. Most Outlook users will only have one profile so the ‘(Default)’ option in the ‘Outlook profile’ dropdown box will be fine but users with multiple profiles will need to select the most appropriate one.

If you have also created your own Personal Folders file (.pst) in Outlook and store your contact data within those folders, you’ll need to select your custom setup in the ‘Information store’ dropdown box. If you have not selected a profile other than ‘(Default)’ in the ‘Outlook Profile’ dropdown box, the ‘Information store’ box will not show your custom folders. Those users who do not use custom personal folders e.g. contact data is stored in ‘Contacts’, will be able to use the ‘(Default)’ option in this dropdown box.

Users who have selected the ‘(Default)’ options so far can usually also select the ‘(Default)’ options for the ‘Contacts folder’ and ‘Appointments’ dropdown boxes. If you use a custom setup and have selected



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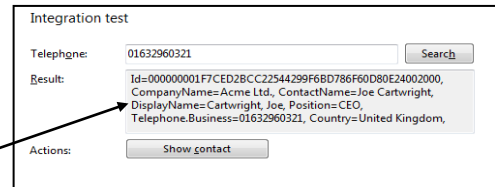
the appropriate profile and information store in the previous steps, the dropdown boxes will list the folders within your custom setup. In the 'Contacts folder' dropdown box, select the folder where your contact data is stored and select the location of your appointment data in the 'Appointments' dropdown box.

Click the 'Save' button to store the information you've entered and apply the configuration.

Testing

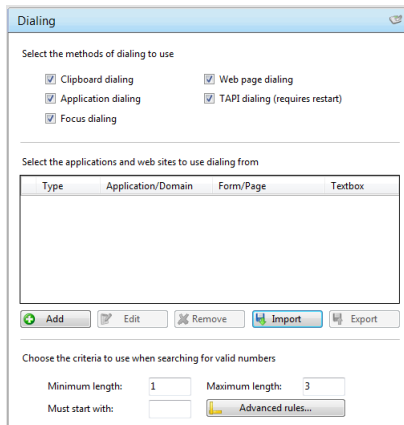
To test if the configuration worked, enter a phone number from your Outlook account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

The test area results should look similar to the results showing in the figure above. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.



Dialing configuration

To dial out from within Outlook, dialing needs to be configured correctly.



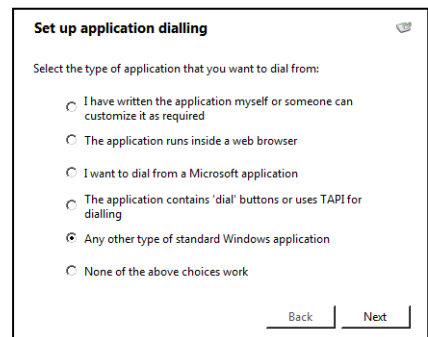
Right-click Xchange's tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialing' option.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box.

Click the 'Add' button to start Xchange's Dialing wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'Any other type of standard Windows application' option.

Click the 'Next' button.






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Dialling: Standard application: Text box

A detection process is used to learn the application.

- 1) Click on the target icon below
- 2) Drag the target icon to the textbox that contains the telephone number

Detect:  (Drag the target icon to the textbox that contains the telephone number)

Application:

Form:

Text box:

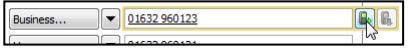
Open Outlook and navigate to a screen that has a telephone number in a textbox you'd like to dial from. Back in Xchange's wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go.

If the wizard finds a valid number, it will add the textbox to the configuration settings. Click 'Next' and then 'Close'.

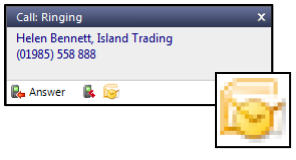
You can add as many textboxes as you like, just start the process by clicking the 'Add' button and working your way through again.

Once you have added a textbox, it works across all of your contacts i.e. you don't need to add the same textbox for each contact.

Click 'Save' to store your settings and you're ready to go. Now, when the cursor hovers over any of the textboxes you have configured icons will appear at the end. Click on them to dial the number in the textbox or hang up.



Functionality



When a call comes in, Xchange's 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognized as one of your contacts from Outlook, their details will also be displayed and you can 'pop' their contact record by clicking the 'Outlook' button in the window.