

Telephony Toolbar–Enterprise

User Guide

Release 4.4
October 2009

Table of Contents

1	Summary of Changes	7
1.1	Changes for this Release	7
2	About This Guide.....	8
2.1	Open Telephony Toolbar-Corporate	8
2.2	First Time Login	9
2.3	Subsequent Use	14
3	Using Telephony Toolbar	16
3.1	The Toolbar.....	16
3.2	Make a Call	20
3.2.1	Dial Number	20
3.2.2	Dial from Web Page	20
3.2.3	Dial from E-mail	21
3.2.4	Dial from Contact List	22
3.2.5	Dial from vCard	22
3.2.6	Dial from Personal Directory	23
3.2.7	Dial from Group Directory.....	23
3.2.8	Dial from Call History	24
3.2.9	Dial from Speed Dial Directory.....	25
3.2.10	Dial from Search	25
3.3	Receive Call.....	26
3.3.1	Answer Call.....	26
3.3.2	Blind Transfer.....	27
3.3.3	Consulted Transfer	27
3.3.4	Open URL.....	27
3.3.5	Save vCard	28
3.4	During a Call	28
3.4.1	Hold Call.....	28
3.4.2	Initiate Three-Way Conference.....	28
3.4.3	Initiate N-Way Conference	28
3.5	End a Call.....	29
3.6	Voice Mail.....	29
3.6.1	Transfer to Voice Mail.....	29
3.6.2	Retrieve Voice Mail.....	30
3.7	Call History.....	30
3.7.1	View Call Logs	30
3.7.2	Delete Call Logs	30
4	Options Dialog	32
4.1	General.....	32
4.2	Account	34

4.2.1	Password Change Dialog	35
4.3	Connection.....	36
4.4	Dialing Rules.....	37
4.5	Outlook Integration	38
4.5.1	Contacts	39
4.6	Updates.....	40
4.7	Web Screen Pop	41
4.8	About.....	42
5	 Services Dialog.....	43
5.1	Incoming Calls	43
5.1.1	Anonymous Call Rejection.....	43
5.1.2	Call Forwarding Always.....	44
5.1.3	Call Forwarding No Answer	45
5.1.4	Call Forwarding Busy	46
5.1.5	Do Not Disturb	47
5.1.6	External Calling Line ID Delivery	48
5.1.7	Internal Calling Line ID Delivery.....	49
5.1.8	Simultaneous Ringing	50
5.1.9	CommPilot Express.....	52
5.2	Outgoing Calls	57
5.2.1	Automatic Callback.....	57
5.2.2	Calling Line ID Delivery Blocking.....	58
5.3	Call Control	59
5.3.1	Remote Office.....	60
5.3.2	Call Waiting	61
5.4	Messaging.....	62
5.4.1	Voice Messaging	62
6	 Troubleshooting	63
6.1	Using Telephony Toolbar-Corporate with Microsoft Windows Service Pack 2 (SP2).....	63
6.2	Telephony Toolbar Not Visible in Outlook.....	64
6.3	Register Telephony Toolbar within Outlook.....	65
6.4	I Have Not Been Licensed to Use Telephony Toolbar	66
6.5	Telephony Toolbar Not Visible in Internet Explorer	66
Index	67

Table of Figures

Figure 1 Telephony Toolbar–Corporate in Internet Explorer	8
Figure 2 Telephony Toolbar–Corporate in Mozilla Firefox	8
Figure 3 Telephony Toolbar–Corporate in Outlook	8
Figure 4 Options Dialog – Accounts Page	9
Figure 5 Options Dialog – Connection Page.....	10
Figure 6 Options Dialog – Update Page	11
Figure 7 Options Dialog – General Page	12
Figure 8 Change Password on First Login Dialog Box	13
Figure 9 Enabled Toolbar.....	13
Figure 10 Login – Change Expired Password	14
Figure 11 Login – Your Password Will Expire Soon.....	14
Figure 12 Numbered Toolbar.....	16
Figure 13 Login Button	16
Figure 14 Options Button	16
Figure 15 Services Button.....	16
Figure 17 Remote Office Button	16
Figure 18 Simultaneous Ringing Button.....	17
Figure 19 CommPilot Profile Button	17
Figure 20 Call Forwarding Always Service Button	17
Figure 21 Call Forwarding No Answer Service Button.....	17
Figure 22 Call Forwarding Busy Service Button.....	17
Figure 23 Do Not Disturb Service Button	18
Figure 24 Speed Dial Directory Button.....	18
Figure 25 Call History Button	18
Figure 26 Personal Directory Button	18
Figure 27 Group Directory Button.....	18
Figure 28 Search Button	18
Figure 29 Telephony Toolbar Drop-down List Button.....	18
Figure 30 Dial Contact Button.....	19
Figure 31 Dial Number Button	19
Figure 32 Answer Button.....	19
Figure 33 Hold Button.....	19
Figure 34 Transfer to Voice Mail Button.....	19
Figure 35 Blind Transfer Button	19
Figure 36 Conference Call Button	19
Figure 37 End Call Button	19
Figure 38 Call Lines Button.....	20
Figure 39 Dial Number Box.....	20
Figure 40 Redial Previous Number	20
Figure 41 Dialing from Web Page	21
Figure 42 Right-click to Dial from E-mail	21
Figure 43 Dialing from Contact List	22
Figure 44 Dialing from vCard.....	22
Figure 45 Dialing from Outlook 2007 vCard.....	23
Figure 46 Personal Directory	23
Figure 47 Group Directory.....	24
Figure 48 Call History	24
Figure 49 Speed Dial Directory.....	25
Figure 50 Search Bar	25
Figure 51 Search Bar History.....	26
Figure 52 Call Notification	26
Figure 53 Transfer Button	27
Figure 54 Opening URL through Call Notification.....	27

Figure 55 Saving vCard through Call Notification.....	28
Figure 56 Hold Button.....	28
Figure 57 Ending Call through Call Notification	29
Figure 58 Transfer to Voice Mail Button.....	29
Figure 59 Call History Button	30
Figure 60 Viewing Call History.....	30
Figure 61 Options Dialog – General Page	32
Figure 62 Options Dialog – Account Page.....	34
Figure 63 Options Dialog – Password Change.....	35
Figure 64 Options Dialog – Connections Page.....	36
Figure 65 Options Dialog – Dialing Rules Page	37
Figure 66 Options Dialog – Outlook Integration Page.....	38
Figure 67 Options Dialog – Contacts Page.....	39
Figure 68 Options Dialog – Update Page	40
Figure 71 Options Dialog – Web Screen Pop Page.....	41
Figure 72 Options Dialog – About Page.....	42
Figure 73 Services Dialog – Anonymous Call Rejection Page.....	43
Figure 74 Services Dialog – Call Forwarding Always Page.....	44
Figure 75 Services Dialog – Call Forwarding No Answer Page	45
Figure 76 Services Dialog – Call Forwarding Busy Page	46
Figure 77 Services Dialog – Do Not Disturb Page	47
Figure 78 Services Dialog – External Calling Line ID Delivery Page	48
Figure 79 Services Dialog – Internal Calling Line ID Delivery Page.....	49
Figure 80 Services Dialog – Simultaneous Ringing Page	50
Figure 81 CommPilot Profiles	52
Figure 82 Services Dialog – CommPilot Express: Available – In Office Page.....	53
Figure 83 Services Dialog – CommPilot Express: Available – Out of Office	54
Figure 84 Services Dialog – CommPilot Express: Busy Page	55
Figure 85 Services Dialog – CommPilot Express: Unavailable Page	56
Figure 86 Services Dialog – Automatic Callback.....	57
Figure 87 Services Dialog – Outgoing Calls: Calling Line ID Delivery Blocking	58
Figure 90 Services Dialog – Call Control: Remote Office	60
Figure 91 Services Dialog – Call Control: Call Waiting	61
Figure 92 Services Dialog – Messaging: Voice Messaging.....	62
Figure 93 Internet Explorer Warning	63
Figure 94 Internet Explorer Warning	63
Figure 95 Internet Explorer Security Warning.....	63
Figure 96 Outlook Toolbar Options	64
Figure 97 Help Dialog, Disabled Items.....	65
Figure 98 Disabled Items Dialog.....	65
Figure 99 License Notification.....	66
Figure 100 Internet Explorer Toolbar Options.....	66

1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Changes for this Release

This version of the document includes the following changes:

- Updated section [4.5 Outlook Integration](#) for EV 92011.
- Changed image in section [3.3.5 Save vCard](#) for EV 91372.
- Changed the image in section [3.3.4 Open URL](#) for EV 91372.
- Edited section [3.1 The Toolbar](#) for EV 91657.
- Updated section [2.2 First Time Login](#) for EV 91369.
- Removed note in section [4.2.1 Password Change Dialog](#) for EV 90442.
- Updated section [3.6.1 Transfer to Voice Mail](#) for EV 90980.
- Updated section [5.4.1 Voice](#) for EV 90634.
- Added section [3.7 Call History](#) for the *Call Log Enhancements Functional Specification*.
- Added section [4.2.1 Password Change Dialog](#) and modified sections [2.2 First Time Login](#) and [2.3 Subsequent Use](#) for *Telephony Toolbar Password Expiry Support Functional Specification*.
- Modified section [5.1.8 Simultaneous Ringing](#) for the *Telephony Toolbar: SimRing Answer Confirmation Functional Specification*.

2 About This Guide

Telephony Toolbar–Corporate is a carrier-class, lightweight desktop communications management product for everyday users of Microsoft Outlook, Microsoft Internet Explorer, and/or Mozilla Firefox.

With this product you can manage your incoming and outgoing messages, maintain up-to-date connection information, and configure controls on your calls and voice mail.

This guide provides step-by-step procedures and reference information for Telephony Toolbar–Corporate Release 4.4.

In this document, Telephony Toolbar–Corporate is interchangeably referred to as Telephony Toolbar or toolbar.

2.1 Open Telephony Toolbar–Corporate

Telephony Toolbar is an add-in to Microsoft Internet Explorer, Outlook, and Mozilla Firefox, and provides new toolbars to access call service and call management features within your web browser and mail client.

When you open Internet Explorer, Outlook, or Firefox with Telephony Toolbar–Corporate you see the following toolbar. Most buttons are disabled until you log in.

NOTE: Telephony Toolbar–Corporate is available for use with Microsoft Outlook.



Figure 1 Telephony Toolbar–Corporate in Internet Explorer



Figure 2 Telephony Toolbar–Corporate in Mozilla Firefox

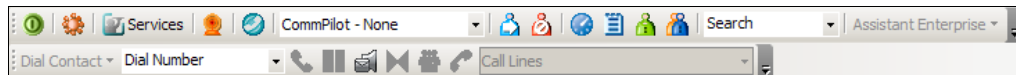


Figure 3 Telephony Toolbar–Corporate in Outlook

2.2 First Time Login

Logging in to Telephony Toolbar identifies you to the servers that manage your phone services. This is so you can receive, initiate, and control calls directly from your computer.

When you log in for the first time, you need to configure your connection settings as described in the following steps. Once these settings are configured, you do not need to provide them again.

You can log in directly from the toolbar by clicking Login.

- 1) Click **Login** on the toolbar.
Telephony Toolbar opens the *Options* dialog.
- 2) Click **Account**.
- 3) To configure your account settings, enter, in the provided fields, the user name and password provided by your administrator for your Telephony Toolbar account.
- 4) Check the *Save Username* and *Save Password* options if you want to avoid being prompted for this information next time you log in. Your password is encrypted for greater security.
- 5) Click **Apply**.

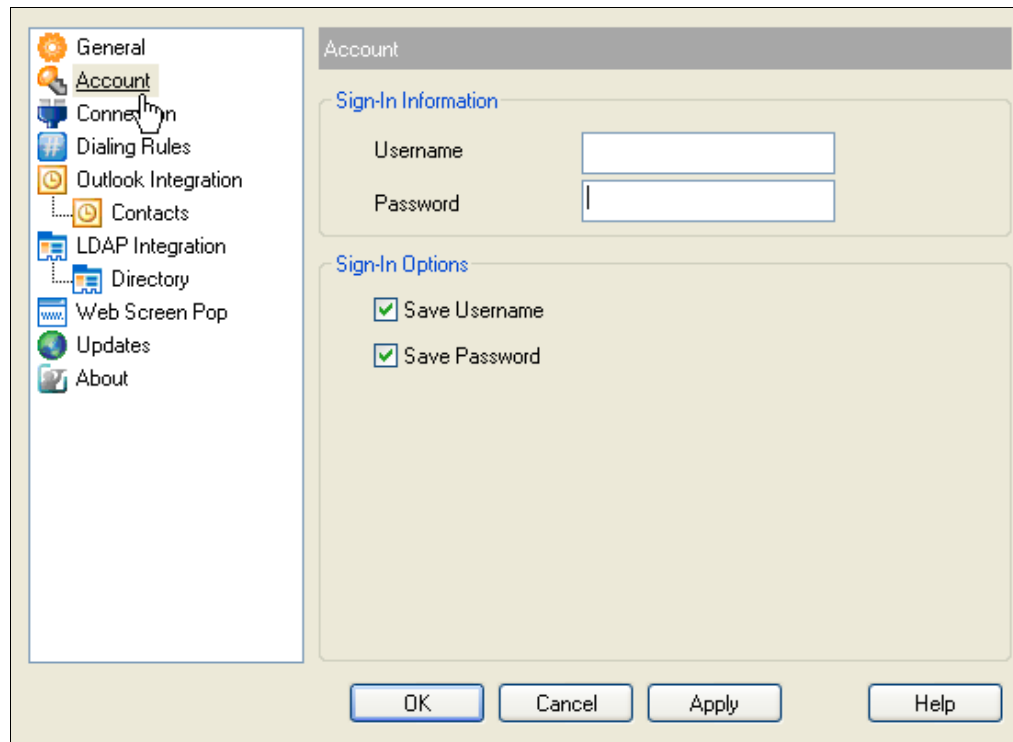


Figure 4 Options Dialog – Accounts Page

- 6) Configure your server connection by clicking **Connection**.
- 7) Enter the server URL and port number in the fields provided. Consult your system administrator for the necessary values.

8) Click **Apply**.

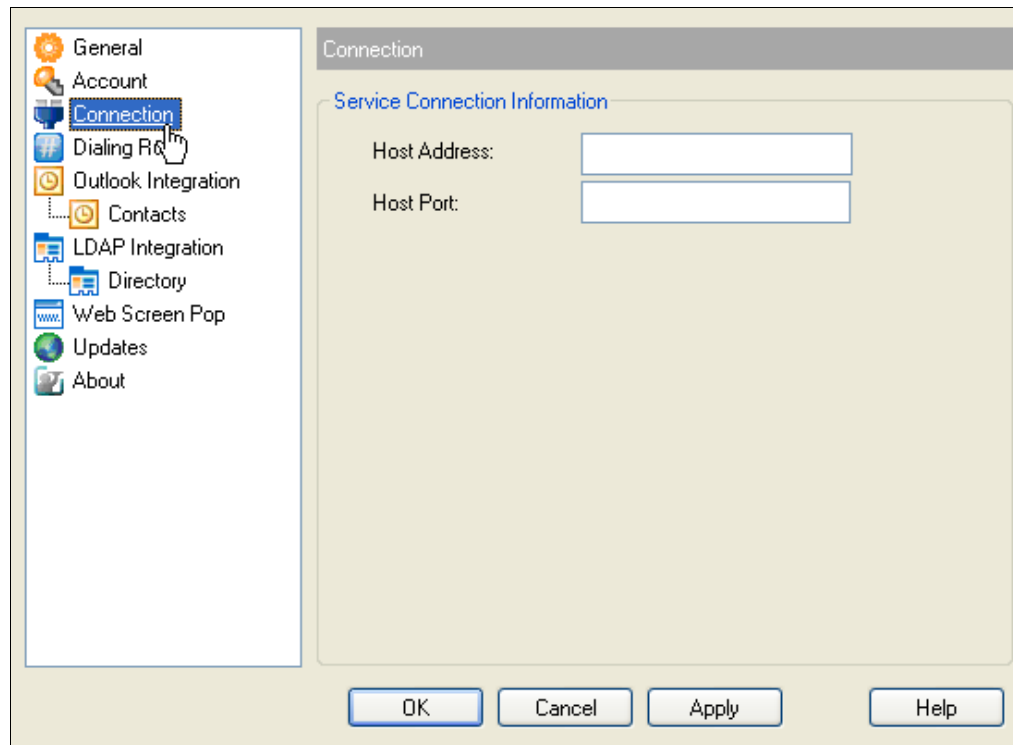


Figure 5 Options Dialog – Connection Page

- 9) If you use a proxy server to access the internet, click **Update**.
- 10) Enter the proxy server information in the fields provided. Consult your system administrator for the necessary values.

11) Click **Apply**.

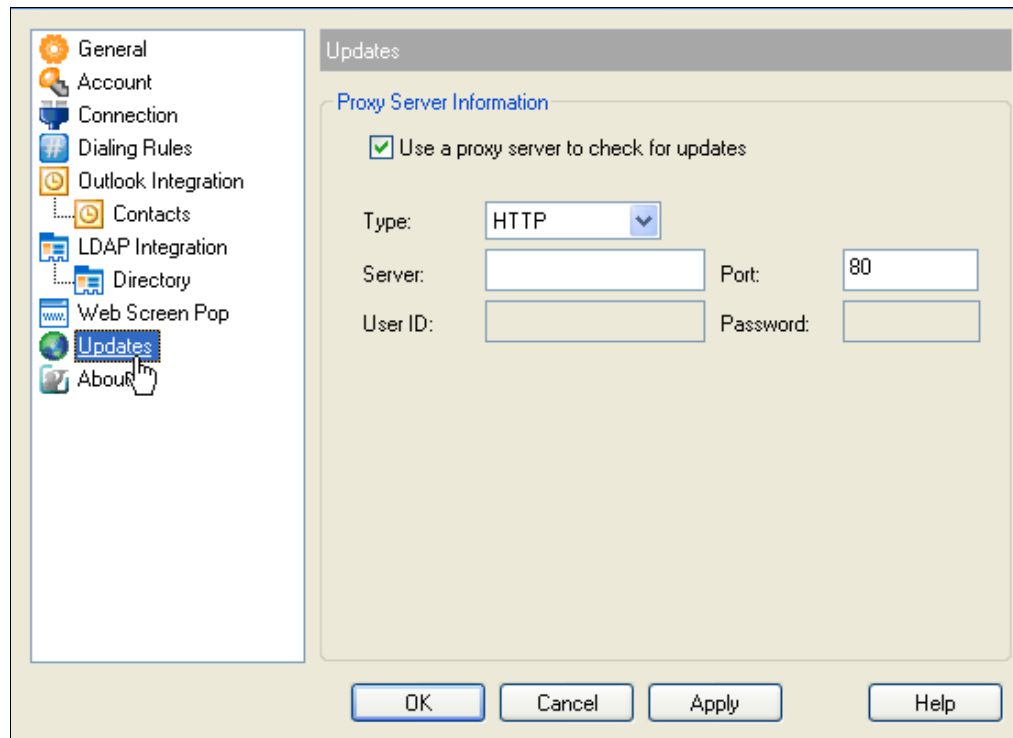


Figure 6 Options Dialog – Update Page

NOTE: The proxy server is not used to connect to the softswitch for telephony services; it is used only to silently check for available Telephony Toolbar upgrades.

- 12) To configure your general settings, click **General** in the tree view to the left of the *Options* dialog.
- 13) Check *Auto login on start-up* to have the Telephony Toolbar connect automatically when you start Internet Explorer, Firefox, or Outlook.
- 14) Check the *Auto login when connected to network* to have the Telephony Toolbar connect automatically when a network connection is available.
- 15) The *Language* drop-down list allows the option of changing the language from the default English (U.S.). The language options are:
 - English (U.S.)
 - French (France)
 - German (Germany)
 - Italian (Italy)
 - Spanish (Spain)
 - Spanish (CALA), for Central and Latin America
 - Simplified Chinese (PRC), for People's Republic of China

- Any custom language the administrator has specified

Selecting the desired language, click **OK** and restart Telephony Toolbar for the changes to take place.

- 16) *Synchronize language with service profile*, when checked, enables the Telephony Toolbar to automatically match the application language to the language set within the subscriber's profile after signing in.

NOTE: If no profile match is found, the language remains set to the current language.

- 17) Click **OK**.

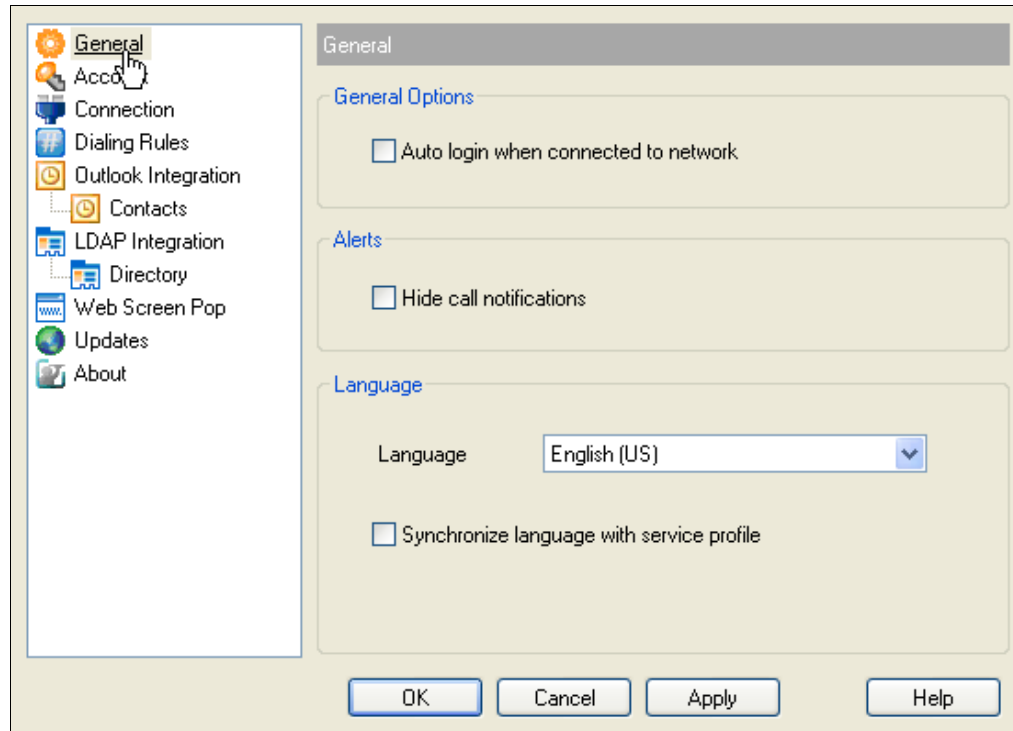
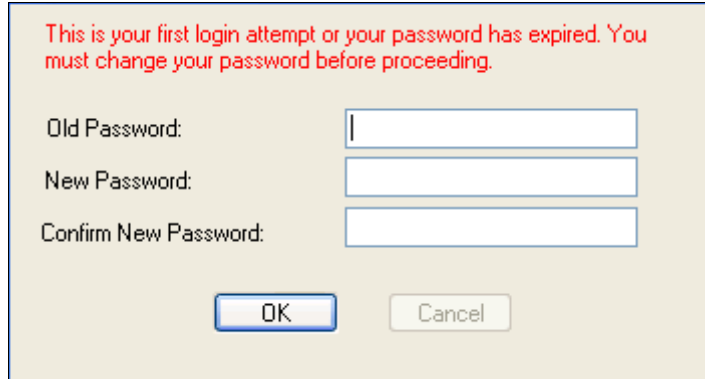


Figure 7 Options Dialog – General Page

2.3 Subsequent Use

Once you have configured Telephony Toolbar-Corporate with the settings it needs to connect to your service provider, you can log in without having to provide that information again. However, if Telephony Toolbar is configured with the Password Expiry option, you may be prompted to change your password upon log in. You can also change your password using the *Options – Account* dialog. For more information, see section [4.2.1 Password Change Dialog](#).

If your password has expired, the following dialog box appears, after you click **Login**.



This is your first login attempt or your password has expired. You must change your password before proceeding.

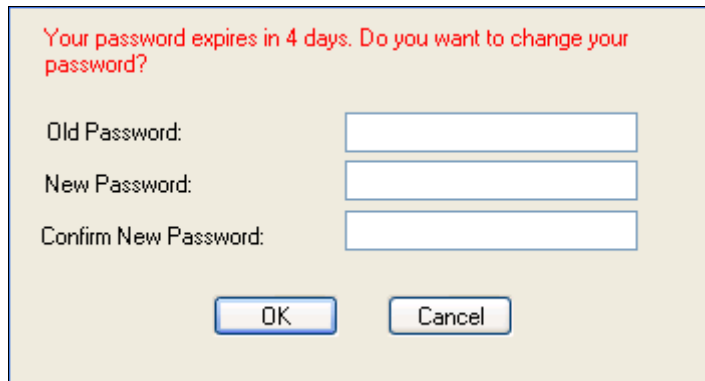
Old Password:

New Password:

Confirm New Password:

Figure 10 Login – Change Expired Password

If your password has not expired yet but will expire soon, the following dialog box appears:



Your password expires in 4 days. Do you want to change your password?

Old Password:

New Password:

Confirm New Password:

Figure 11 Login – Your Password Will Expire Soon

- 1) Enter your old password.
- 2) Enter your new password twice, to confirm it.
- 3) Click **OK**.
- 4) Or, if your password has not expired yet, click **Cancel** to cancel password change.

In both cases, you are logged into Telephony Toolbar. If you have not changed your password, you are prompted to do so when you log in again.

NOTE 1: If your password has expired, the **Cancel** button is disabled forcing you to change your password before you are logged in to Telephony Toolbar.

NOTE 2: All fields in the *Password Change* dialog box are mandatory.

3 Using Telephony Toolbar

When you have successfully logged in to Telephony Toolbar, most of the buttons on your toolbar are enabled.

3.1 The Toolbar

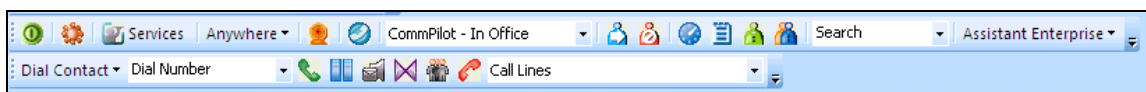


Figure 12 Numbered Toolbar

Detailed Description of Buttons

Login: Logs in and out of Telephony Toolbar. The color of this icon indicates your login status.

A grey icon indicates that you are not logged in. A green icon shows that you are currently logged in. A disabled button shows that Telephony Toolbar is attempting to log in. A red button indicates that your last login attempt failed.



Figure 13 Login Button

Options: You can configure your account, connection settings, and dialing rules through this dialog. This icon is highlighted when open.



Figure 14 Options Button

Services: You can configure the Call Management services provided by Telephony Toolbar. This icon is highlighted when in use.



Figure 15 Services Button

Remote Office: When activated, this service allows you to use an alternate phone, such as a mobile, home, or hotel phone, as your main business phone. When this service is enabled, the icon is highlighted.

If Remote Office is not yet configured when you use this icon, Telephony Toolbar opens the *Services* dialog to the *Remote Office* page so you can configure the service.



Figure 16 Remote Office Button

Simultaneous Ringing: This allows you to set up a list of up to ten additional phone numbers that ring each time you receive a call. While the service is enabled, the icon remains highlighted.

If Simultaneous Ringing is not yet configured when you use this icon to activate the service, Telephony Toolbar opens the *Service* dialog to the *Simultaneous Ringing* page for you to configure the service.



Figure 17 Simultaneous Ringing Button

Current CommPilot Profile sets the current CommPilot Express profile, which determines the way the system handles incoming calls. You can configure the settings for your CommPilot Express profiles in the *Services* dialog.

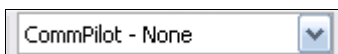


Figure 18 CommPilot Profile Button

Call Forwarding Always Service automatically forwards all incoming calls to a specified phone number. When this service is enabled, this icon remains highlighted.

If Call Forwarding Always is not yet configured when you use this icon to activate the service, Telephony Toolbar opens the *Service* dialog to the *Call Forwarding Always* page for you to configure the service.



Figure 19 Call Forwarding Always Service Button

Call Forwarding No Answer Service automatically forwards all incoming calls to a specified phone number when you do not answer within a specified number of rings. While the service is enabled, the icon remains highlighted.



Figure 20 Call Forwarding No Answer Service Button

Call Forwarding Busy Service forwards all incoming calls to a specified phone number when you are busy on other calls. While the service is enabled, this icon remains highlighted.

If Call Forwarding Busy is not yet configured when you use this icon to activate the service, Telephony Toolbar opens the *Services* dialog to the *Call Forwarding Busy* page for you to configure the service.



Figure 21 Call Forwarding Busy Service Button

Do Not Disturb Service automatically forwards all incoming calls to your Voice Messaging service, or plays callers a busy tone if you do not have a Voice Messaging service configured. While the service is enabled, this icon remains highlighted.



Figure 22 Do Not Disturb Service Button

Speed Dial Directory allows you to dial phone numbers saved in your speed dial list by clicking them with your mouse.



Figure 23 Speed Dial Directory Button

Call History opens the list of your most recent received calls, missed calls, and dialed calls.



Figure 24 Call History Button

Personal Directory allows you to dial phone numbers saved in your personal list by clicking them with your mouse.



Figure 25 Personal Directory Button

Group Directory permits you to dial phone numbers saved in your personal list by clicking them with your mouse.



Figure 26 Group Directory Button

Search hunts in the group, personal and Outlook Express directories for the criteria you enter.



Figure 27 Search Button

Telephony Toolbar drop-down list contains URLs preconfigured by your service provider administrator. Select an item from the list to navigate to that page in your web browser.

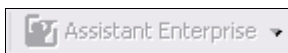


Figure 28 Telephony Toolbar Drop-down List Button

Dial Contact dials the business, home, or mobile number of a selected contact within Microsoft Outlook.



Figure 29 Dial Contact Button

Dial Number dials a specified number.

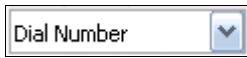


Figure 30 Dial Number Button

Answer answers an incoming call.



Figure 31 Answer Button

Hold puts the current call on hold.



Figure 32 Hold Button

Transfer to Voice Mail transfers the current call to your *Voice Messaging* service.



Figure 33 Transfer to Voice Mail Button

Blind Transfer transfers the current call to another phone number.



Figure 34 Blind Transfer Button

Conference Call starts a conference call that can include 3 to 32 callers. This button only becomes enabled when you are connected to two other parties at the same time.



Figure 35 Conference Call Button

End Call ends the current call.



Figure 36 End Call Button

Call Lines is a list of phone numbers you are currently connected to.



Figure 37 Call Lines Button

3.2 Make a Call

3.2.1 Dial Number

To dial a new number:

- 1) Type the number in the *Dial Number* box.
- 2) To place the call, press ENTER.
- 3) To end the call, click **End**.



Figure 38 Dial Number Box

To redial a previously dialed number:

- 1) Select a number by clicking on the arrow at the right-hand side of the *Dial Number* box.
A list of up to 10 previously dialed numbers is displayed.
- 2) Click on a number in the *Dial Number* list.
- 3) To place the call, press ENTER.
- 4) To end the call, click **End**.

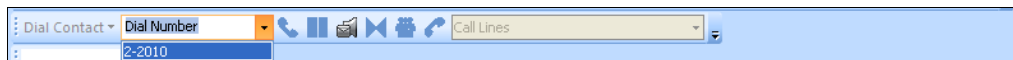


Figure 39 Redial Previous Number

3.2.2 Dial from Web Page

To dial from a web page:

- 1) Select the phone number displayed on a web page.
- 2) Highlight the number with your mouse.
- 3) Right-click the highlighted phone number and select *Dial* from the pop-up window.

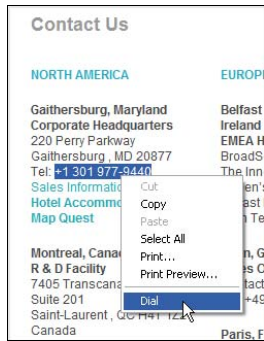


Figure 40 Dialing from Web Page

3.2.3 Dial from E-mail

NOTE: At the time this document was printed, this feature was only available in Outlook 2002 and Outlook 2003. This is, by design, a limitation of Outlook 2000 and Outlook 2007.

Make sure that the e-mail you wish to dial from is in the HTML format. To dial a contact from an outlook e-mail, follow these steps:

- 1) Open the e-mail that contains the phone number you wish to dial. Make sure it is either an open message or in the preview format.
- 2) Use your mouse to highlight the number you wish to dial.
- 3) Right-click the highlighted number. A drop-down list appears. Click on **Dial**. The phone call is now placed.

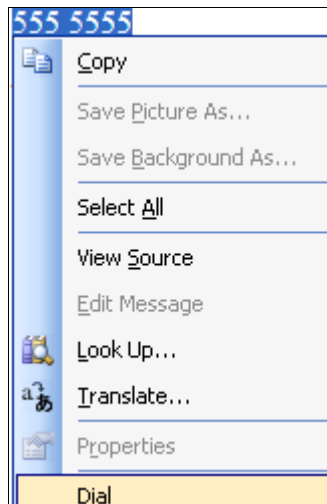


Figure 41 Right-click to Dial from E-mail

3.2.4 Dial from Contact List

With Telephony Toolbar you can dial the home, business, or mobile number of any contact directly within Outlook.

- 1) Click *Contact* in the folder list.
- 2) Select the contact you wish to call from the contact list.
- 3) Click the arrow at the right-hand side of the *Dial Contact* drop-down list, on the toolbar within Outlook.
- 4) Select the type of number to call.

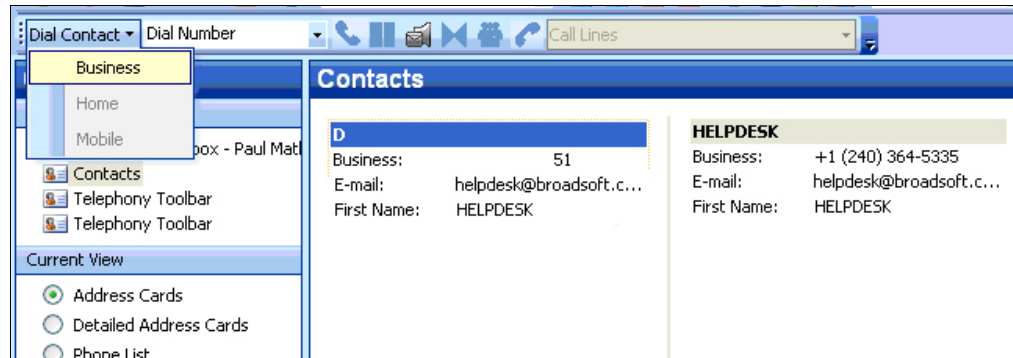


Figure 42 Dialing from Contact List

3.2.5 Dial from vCard

To dial from a vCard in Outlook 2000/2002/2003:

- 1) Click *Contacts* in the folder list.
- 2) Double-click the contact you want to call. Outlook opens the contact's vCard.
- 3) Click the arrow at the right-hand side of the *Dial Contact* drop-down list, on the toolbar within Outlook.
- 4) Select the type of number to call.

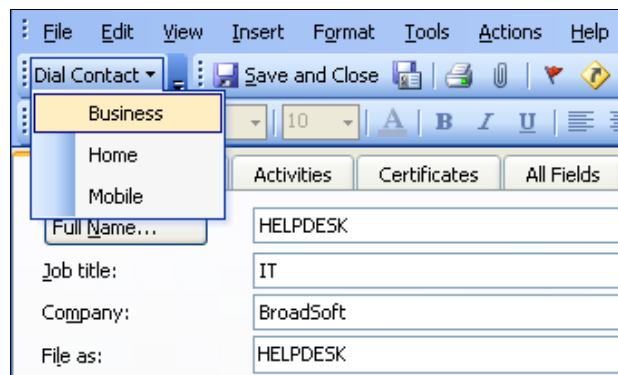


Figure 43 Dialing from vCard

To dial from a vCard in Outlook 2007:

- 1) Click *Contacts* in the folder list.

- 2) Double-click the contact you want to call. Outlook opens the contact's vCard.
- 3) Click the **Telephony Toolbar** tab.
- 4) Select the type of number to call.



Figure 44 Dialing from Outlook 2007 vCard

NOTE: If there is no number specified for a contact, but you click on the Home, Business, or Mobile buttons in your vCard ribbon, a message appears stating "No number is specified for this contact". This is, by design, a limitation of Microsoft Outlook 2007 API.

3.2.6 Dial from Personal Directory

You can directly dial any number stored in your personal directory as it is integrated with the contacts in Telephony Toolbar.

- 1) To open the personal directory, click **Personal Directory** on the toolbar.

This page can be printed using the host application. Users with Microsoft Windows XP Service Pack 2 installed may encounter a warning when opening the Personal Directory. For more information, see section [6 Troubleshooting](#).
- 2) To sort the personal directory, click on a *column* header. The table is sorted, in descending order, according to the information in the column you selected.
- 3) To change the sort order between descending and ascending, click on the same *column* header again.
- 4) To dial a number from the personal directory, click on the desired phone number. Telephony Toolbar places the call.

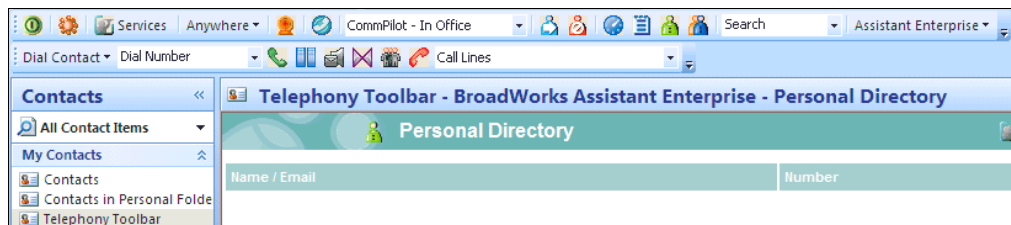


Figure 45 Personal Directory

3.2.7 Dial from Group Directory

You can directly dial any number stored in your group directory that integrates the group contacts, provided by your service provider, with Telephony Toolbar.

- 1) Click **Group Directory** on the toolbar.

This list can be printed using the host application. Users with Microsoft Windows XP Service Pack 2 installed may encounter a warning when opening the Group Directory. For more information, see section [6 Troubleshooting](#).

- 2) To sort the group directory, click on a *column* header. The table is sorted, in descending order, according to the information in the column you selected.
- 3) To change the sort order between descending and ascending, click on the same *column* header again.
- 4) To dial a number from the group directory, click on the desired phone number. Telephony Toolbar places the call.

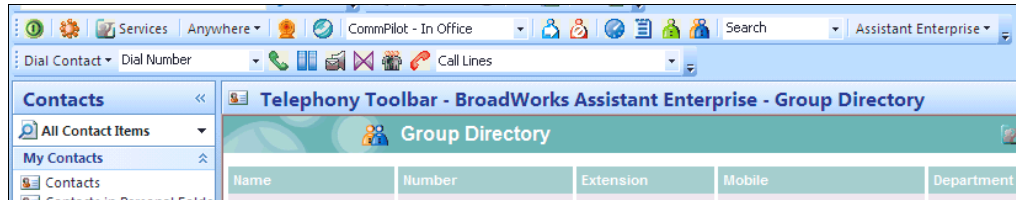


Figure 46 Group Directory

3.2.8 Dial from Call History

Call History allows users to view their missed calls, received calls, and dialed calls. These are listed in reverse chronological order.

- 1) To open the Call History, click **Call History** on the toolbar.
- 2) To dial from the call history, click on the desired phone number. Telephony Toolbar automatically places the call.

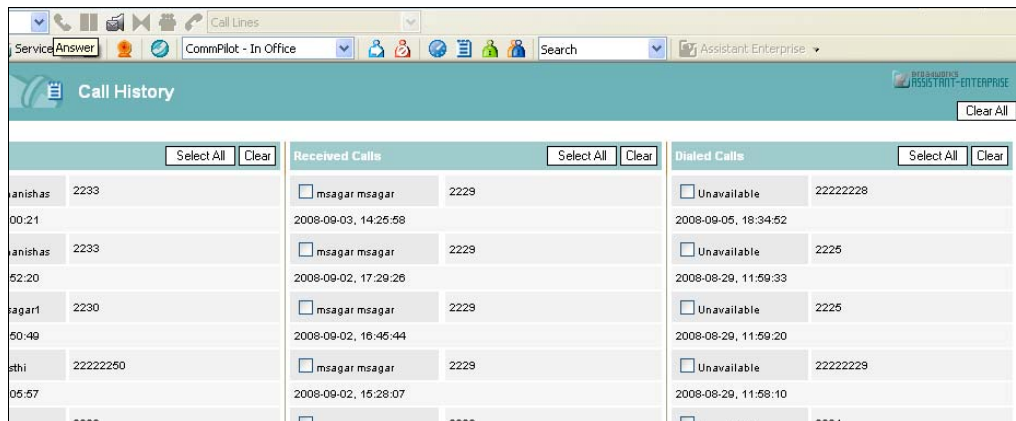


Figure 47 Call History

3.2.9 Dial from Speed Dial Directory

You can dial from the speed dial directory.

- 1) To open the Speed Dial Directory, click **Speed Dial Directory** on the toolbar.
- 2) To dial from the speed dial directory, click the desired phone number and Telephony Toolbar places the call.

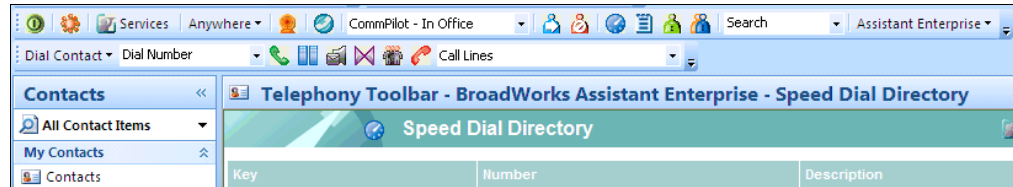


Figure 48 Speed Dial Directory

3.2.10 Dial from Search

Use the *Search* drop-down list to search for a user or contact. The search results include all users in the Group, Personal and Outlook Express directories, if configured to do this. Your search returns all users that match your criteria in any field. For example, if you enter "sa" as your criteria, your search might return users with the first name "Sally" or with the last name "Sanders" as well as users in the department "sales".

You can also search for users by phone number.

To search for a user:

- 1) Type your criteria in the *Search* box.
- 2) Press ENTER to execute the search.
Telephony Toolbar displays the results of your search.
- 3) Click the phone number you want to dial.
- 4) To end the call, click **End**.

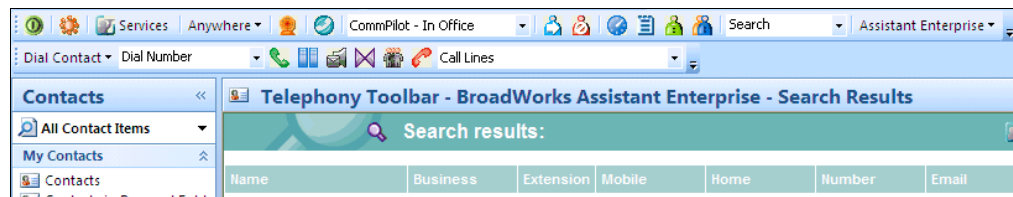


Figure 49 Search Bar

To re-execute a previous search:

- 1) Select a previous search criteria by clicking on the arrow at the right-hand side of the *Search* box.
A list of previous search criteria is displayed.
- 2) Select an item in the list.
Telephony Toolbar displays the results of your search.

- 3) Click the phone number you want to dial.
- 4) To end the call, click **End**.

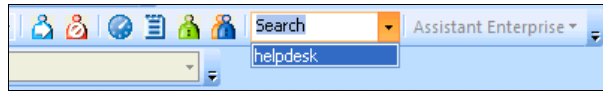


Figure 50 Search Bar History

3.3 Receive Call

3.3.1 Answer Call

NOTE: You can only answer a call via Telephony Toolbar if you have an Advanced Call Control (ACC) compliant phone.

When you receive a call, Telephony Toolbar displays a call notification window on top of the system tray. You can answer this call by picking up your handset from the toolbar or by clicking the call notification (only if you have an Advanced Call Control [ACC] compliant phone).

- To answer a call from Telephony Toolbar, click **Answer**.
- To answer a call from the call notification, click on it.

When using Telephony Toolbar with Outlook, if the incoming call does not provide a name for the calling party, Telephony Toolbar checks the number against your Outlook contacts and displays the corresponding name if it finds a match.

You can also transfer the caller to your Voice Mail, save a vCard for the caller, open a URL populated with the caller's number, or end the call directly from the call notification.

3.3.1.1 Call Notification

When you initiate or receive a call, Telephony Toolbar displays a notification window above the system tray, which includes the other party's phone number and other information about the call. Clicking the hyperlinked text in the call notification automatically answers the call.

The call notification stays open for the duration of the alerting call.

If you initiate or receive another call while the first notification is open, the call notifications stack on top of one another.



Figure 51 Call Notification

3.3.2 Blind Transfer

Use this method to transfer a call to another specified number without providing an introduction to the destination party.

Calls may be transferred this way while active, held, or ringing on your phone. In the latter case, the system redirects the call before it is answered.

- 1) If the first party is not already on the line, dial a number on your phone or select a number using any of the methods described in section [3.2 Make a Call](#).
- 2) Call the second number. This automatically puts the first party on hold if the first party is not already on hold.
- 3) Initiate the transfer by clicking Transfer on the toolbar. The parties are now connected.



Figure 52 Transfer Button

3.3.3 Consulted Transfer

Use this method to transfer a call to another specified number and (optionally) provide an introduction to the destination party. Calls may be transferred this way while active, held, or ringing on your phone.

When a supervised transfer is initiated, the primary call is placed on hold and a call is made to the party intended to receive the call. The receiving party may be consulted prior to accepting the call.

- 1) If the first party is not already on the line, dial a number on your phone or select a number using any of the methods described in section [3.2 Make a Call](#).
- 2) Call the second number. This automatically puts the first party on hold.
- 3) Wait until the called party accepts your call, and then click **Transfer** to connect the parties.

3.3.4 Open URL

When you receive a call, Telephony Toolbar displays a call notification window on top of the system tray.

To open a URL in your browser, click **Web Pop URL** in the call notification.

This opens a page in your browser window that contains information about the calling party encoded in its URL.

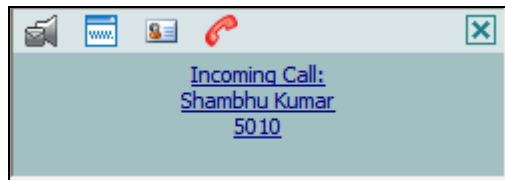


Figure 53 Opening URL through Call Notification

You can also transfer the caller to your Voice Mail, save a vCard for the caller, open a URL populated with the caller's number, or end the call directly from the call notification.

3.3.5 Save vCard

When you receive a call, Telephony Toolbar displays a call notification window on top of the system tray.

You can click a button in this notification to save the caller's phone number and personal information as a vCard in Outlook. To do this, click **Add vCard** in the call notification.

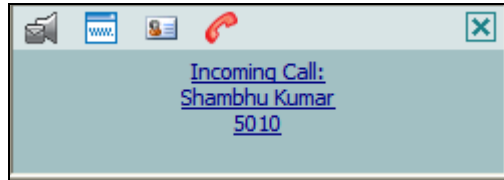


Figure 54 Saving vCard through Call Notification

You can also transfer the caller to your Voice Mail, save a vCard for the caller, open a URL populated with the caller's number, or end the call directly from the call notification.

3.4 During a Call

3.4.1 Hold Call

- 1) To hold a call, click **Hold** on the toolbar. The Hold button is grayed out to indicate the held status of the call.
- 2) To resume a held call, click **Answer** (highlighted) on the toolbar. The hold returns to its normal state to indicate the active status of the call.



Figure 55 Hold Button

3.4.2 Initiate Three-Way Conference

NOTE: You must have the Three-Way Call service assigned to you to use this feature.

You can initiate a conference with two other parties directly from the toolbar. To establish two simultaneous active calls, you must have only two phone numbers listed in the *Call Lines* drop-down list. These calls may have been initiated either by you or by the other parties.

- 1) To start the conference, click **Three-Way Conference** on the toolbar.
- 2) To drop only one participant from the conference, select the participant's number from the *Call Lines* drop-down list and click **End**.

3.4.3 Initiate N-Way Conference

NOTE: You must have the N-Way Call service assigned to you to use this feature.

You can initiate a conference with two or more parties. The maximum number of parties allowed in the conference call is controlled by your service provider for which the range is 4 through 15 participants. You must have at least two phone numbers listed in the *Call Lines* drop-down list. All calls on the list are added to the conference. These calls can be initiated either by you or by the other parties.

- 1) To start the conference, click **N-Way Conference** on the toolbar.
- 2) To add new incoming or outgoing calls to the conference, click **N-Way Conference** on the toolbar.
- 3) To drop only one participant from the conference, select the participant's number from the *Call Lines* drop-down list and click **End**.

3.5 End a Call

You can end both incoming and outgoing calls directly from the toolbar and from the call notification window.

- To end a call from the toolbar, click **End** on the toolbar.
- To end a call from the call notification, click **End Call**.



Figure 56 Ending Call through Call Notification

3.6 Voice Mail

3.6.1 Transfer to Voice Mail

You can transfer calls to your Voice Mail from the toolbar and from the call notification window.

To transfer a call to Voice Mail from the Telephony Toolbar, click **Voice Mail Transfer** on the toolbar.



Figure 57 Transfer to Voice Mail Button

To transfer a call to Voice Mail from the call notification, click the Voice Mail Transfer icon in the notification window.

NOTE: If the color of the envelope icon on the Dial Voice Mail button changes, then a new voice mail is available.

3.6.2 Retrieve Voice Mail

Make sure that you are not currently engaged in a call. No entries must be present on the *Call Lines* drop-down list.

Transfer yourself to your Voice Mail by clicking **Voice Mail Transfer** on the toolbar.

3.7 Call History

You can view and delete old call logs using the Call History feature. You can also make calls from Call History. Viewing and deleting call logs is described in the remainder of this section. For more information about making calls, see section [3.2.8 Dial from Call History](#).

3.7.1 View Call Logs

To view call logs, click **Call History** on the toolbar.



Figure 58 Call History Button

The *Call History* window appears where you can view your dialed, received, and missed calls.

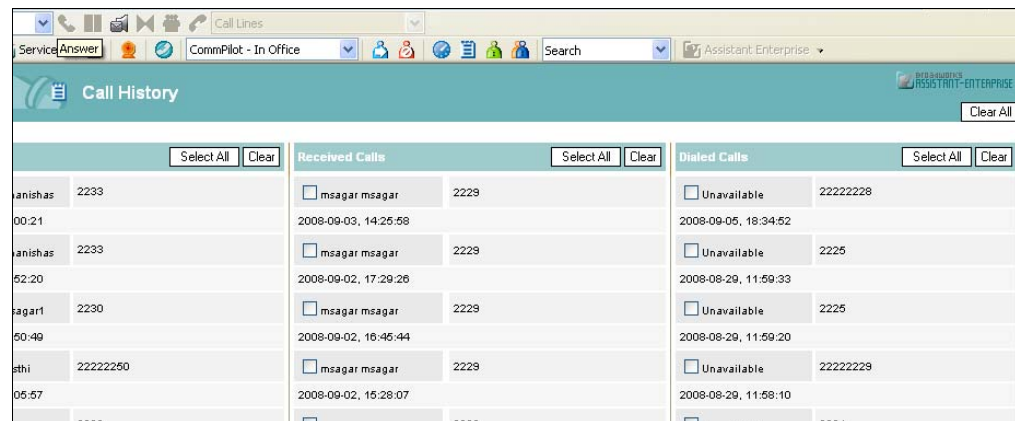


Figure 59 Viewing Call History

3.7.2 Delete Call Logs

To delete selected call logs:

- 1) Select the calls you want to clear, by checking the corresponding check-boxes. Alternatively, to select all calls in a specific call log (Dialed Call, Received Calls, or Missed Calls), click the corresponding **Select All** button.
- 2) Click the corresponding **Clear** button.

To clear all call logs in all log categories:

Click **Clear All**, at the top-right of the *Call History* window.

NOTE: When you select **Clear** or **Clear All**, a warning message appears. When you click **OK** the delete request is executed. When you click **Cancel** it ignores the request. This warning message is customizable through the Deployment Studio.

You need to refresh the *Call Log History* to view the changes.

4 Options Dialog

The *Options* dialog allows you to configure the connection and account settings that Telephony Toolbar uses to communicate with your service provider. The left-hand side of the dialog contains a tree view, listing the configuration pages you can access. The configuration pages you select in the tree view are displayed on the right.

- 1) Click **OK** to save all changes and close the dialog.
- 2) Click **Apply** to save all changes without closing the dialog. Cancel closes the dialog without saving your changes.

4.1 General

The *General* page allows you to configure the automatic login behavior of Telephony Toolbar.

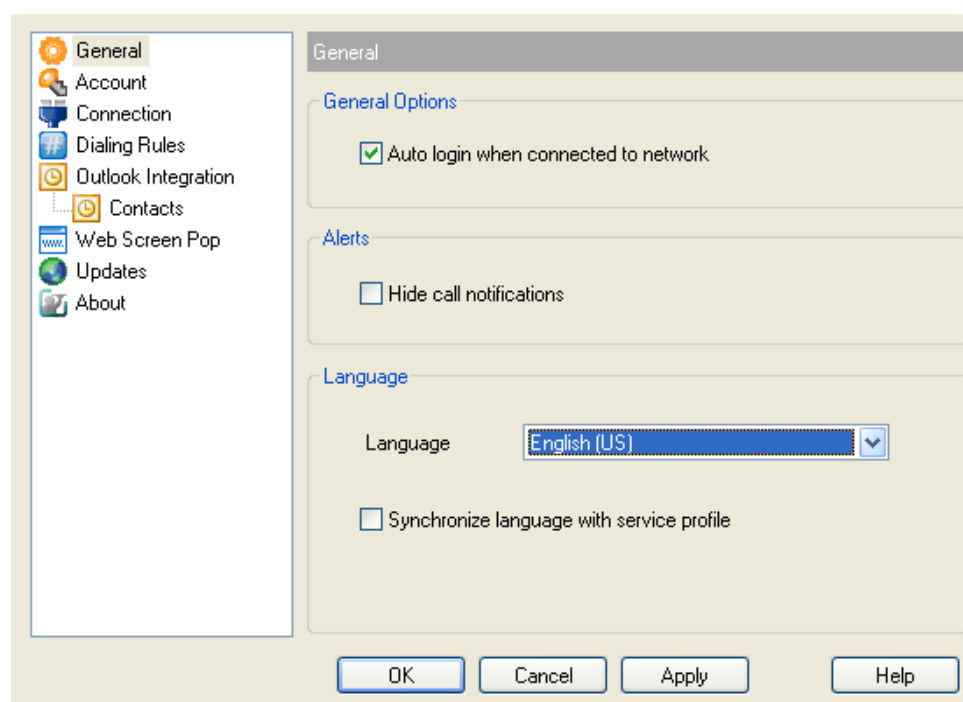


Figure 60 Options Dialog – General Page

- *Auto login when connected to network* automatically logs in to your service provider when it detects an active network connecting on your computer.
- *Hide Call Notification* disables the call notification window. When this box is checked, the call notification does not appear when Telephony Toolbar detects an incoming or outgoing call.

The *Language* options are as follows:

- The *Language* drop-down list allows the option of changing the language from the default English (U.S.). The language options are:
 - English (U.S.)
 - French (France)

- German (Germany)
- Italian (Italy)
- Spanish (Spain)
- Spanish (CALA), for Central and Latin America
- Simplified Chinese (PRC), for People's Republic of China
- Any custom language the administrator has specified

Selecting the desired language, click **OK** and restart Telephony Toolbar for the changes to take place.

- *Synchronize language with service profile*, when checked, enables Telephony Toolbar to automatically match the application language to the language set within the subscriber's profile after signing in.

NOTE: If no profile match is found, the language remains set to the current language.

Additional Steps for Double-byte Languages

For Telephony Toolbar-Corporate to support double-byte languages including East Asian locales such as Chinese, Japanese, and Korean (CJK), additional steps must be followed to change your Windows XP/Vista *Regional and Language Options*.

To support double-byte languages in Telephony Toolbar, use the following procedure:

- 1) Make sure the language within Telephony Toolbar is set to the desired double-byte language (for example, Chinese Simplified (PRC)).
- 2) You are prompted to restart the application for the changes to take effect, but do not restart until completion of the additional steps that follow.
- 3) Click the **Microsoft Windows Start menu** button.
- 4) Click the **Control Panel** menu item.
- 5) Within the *Control Panel* open the *Regional and Language Options* settings.
- 6) Select the *Advanced* tab.
- 7) Modify the *Language for non-Unicode programs* to match the desired language.

NOTE: All double-byte languages such as Chinese, Japanese, and Korean must change the drop-down list value. However, most Latin script-based languages such as English, French, German, Italian, and Spanish function without modification to this drop-down list value.

- 8) Click **OK** or **Apply** to save the changes
- 9) You may be prompted to restart. Close all open applications and restart Windows for the settings to take effect.

When the Windows XP/Vista operating system has been rebooted, the user can launch Telephony Toolbar-Corporate, and the East Asian double byte language is displayed correctly.

4.2 Account

The *Account* page allows you to specify your user name and password. You can also change your password, if permitted to do so by your system administrator.

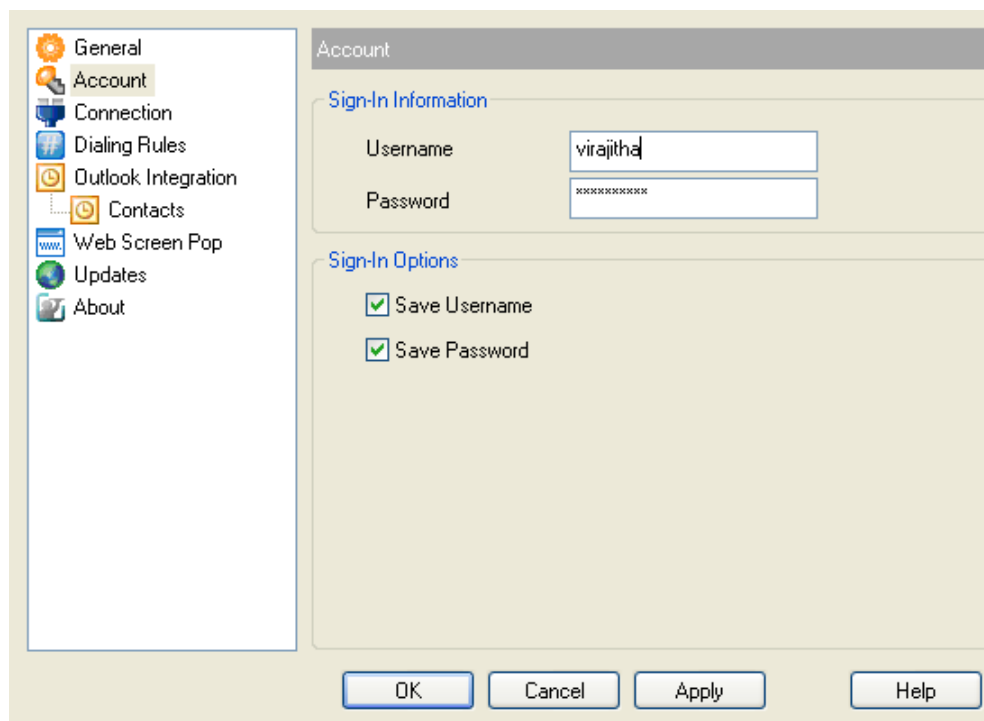


Figure 61 Options Dialog – Account Page

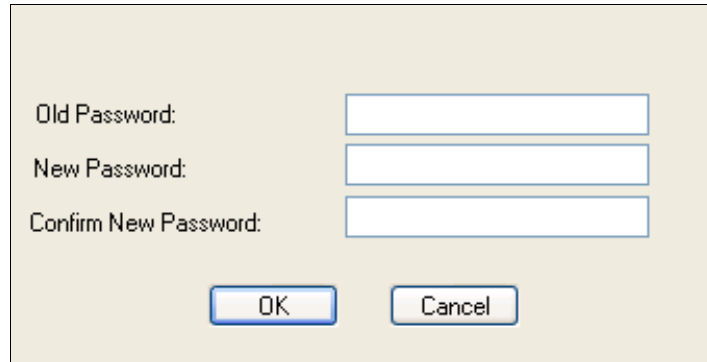
Contact your service provider or system administrator if you do not know the appropriate settings. Once you successfully log in, the controls on this page become inactive.

- *Save Username* determines whether Telephony Toolbar saves the user name you provide. Check this box to avoid having to specify your user name each time you log in to the program.
- *Save Password* determines whether Telephony Toolbar saves the password you provide above. Check this box to avoid having to specify your password each time you log in to Telephony Toolbar.

Telephony Toolbar encrypts your password for greater security.

4.2.1 Password Change Dialog

Click **Change Password** on the *Options Dialog – Account* page to display the *Password Change* dialog.



The image shows a dialog box with a light beige background. It contains three text input fields stacked vertically. The first field is labeled 'Old Password:', the second 'New Password:', and the third 'Confirm New Password:'. Below the fields are two buttons: 'OK' and 'Cancel'.

Figure 62 Options Dialog – Password Change

To change your password:

- 1) On the toolbar, click **Options**.
Telephony Toolbar opens the *Options* dialog.
- 2) Click **Accounts**.
- 3) On the Account page, click Change Password.
The *Password Change* dialog box appears.
- 4) In the text boxes, enter your old password and then your new password twice.
- 5) Click **OK**.
To cancel you changes, click **Cancel**.

NOTE: All fields in the *Password Change* dialog box are mandatory.

4.3 Connection

The *Connection* page allows you to specify the network address of the server that Telephony Toolbar connects to.

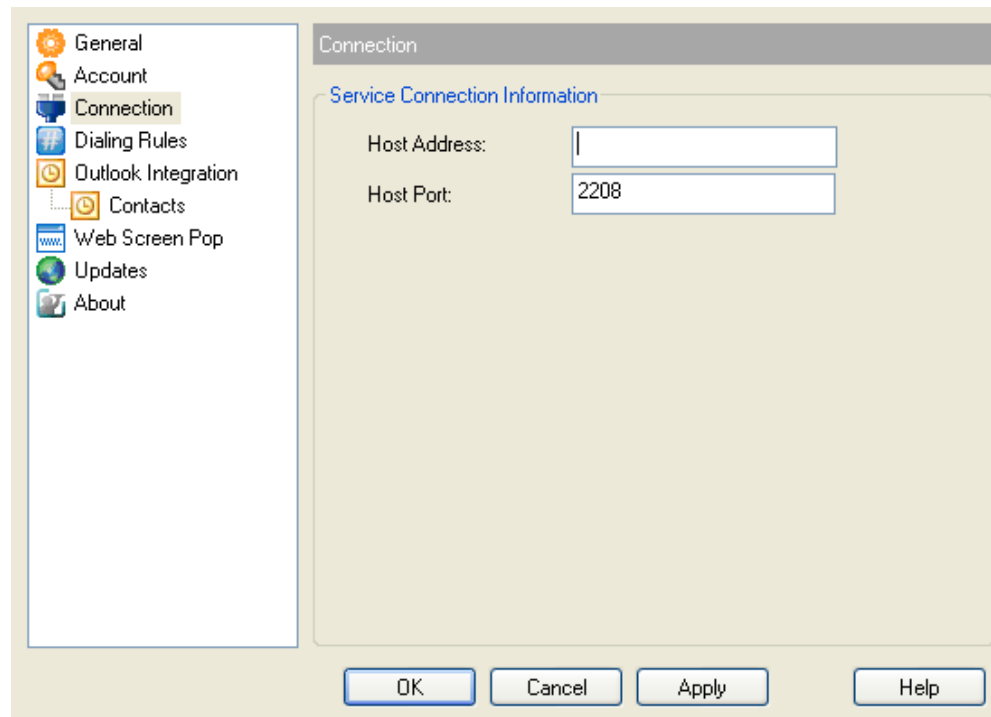


Figure 63 Options Dialog – Connections Page

Contact your service provider or system administrator if you do not know the appropriate settings. Once you successfully log in, the controls on this page become inactive.

- *Host Address* specifies the URL or IP address which Telephony Toolbar attempts to connect to when logging in.
- *Host Port* is the port number used by the Telephony Toolbar on the host specified above.

4.4 Dialing Rules

The *Dialing Rules* page allows you to configure special dialing rules for Telephony Toolbar.

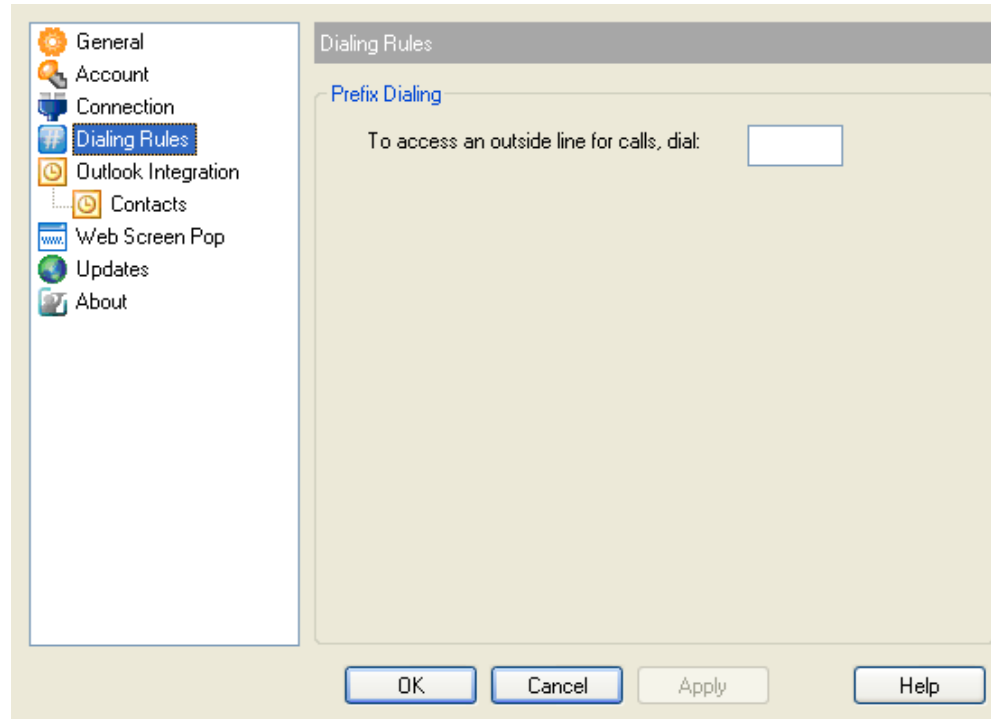


Figure 64 Options Dialog – Dialing Rules Page

To access an outside line for calls, dial specifies a prefix number that Telephony Toolbar includes automatically when dialing external numbers.

If entered, this number is pre-pended only to dialed numbers that contain more than six digits. Up to five digits may be entered in this field.

Valid characters are the numbers 0 to 9 and the symbol "+". If you include the "+" character, it must be the first character in the field.

4.5 Outlook Integration

The *Outlook Integration* page enables and disables the use of Telephony Toolbar with Microsoft Outlook. As of Outlook 2007 you are unable to dial a contact in your in box using the right click-to-dial function.

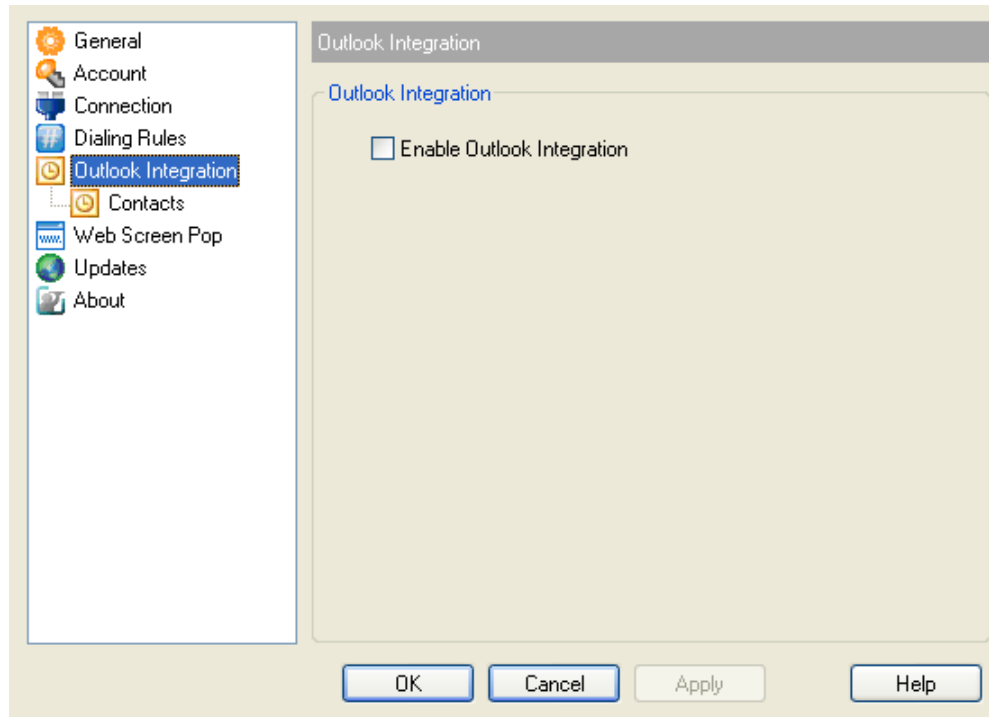


Figure 65 Options Dialog – Outlook Integration Page

The *Enable Outlook Integration* check box, when checked, makes sure that the Outlook integration features are activated.

4.5.1 Contacts

The *Contacts* page allows you to configure the way Telephony Toolbar integrates with your Outlook contact list.

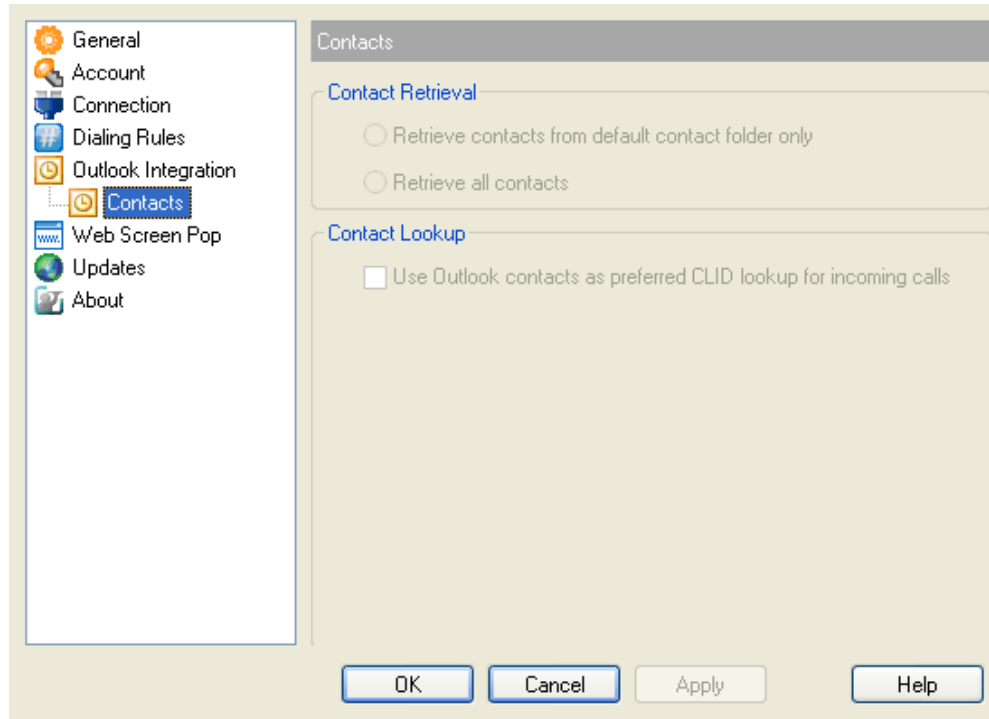


Figure 66 Options Dialog – Contacts Page

- The *Retrieve contacts from default contact folder only* option searches for and retrieves contacts stored in the default *Contacts* folder within Outlook.
- The *Retrieve all contacts* option searches for and retrieves contacts stored in any Outlook folder.
- *Use Outlook contacts as preferred CLID lookup for incoming calls* determines whether Telephony Toolbar uses the information saved in your Outlook contact list when displaying information about callers, instead of using group settings or other calling line ID information.

4.6 Updates

The *Updates* page allows you to configure a web proxy server for Telephony Toolbar to use when connecting to the Internet.

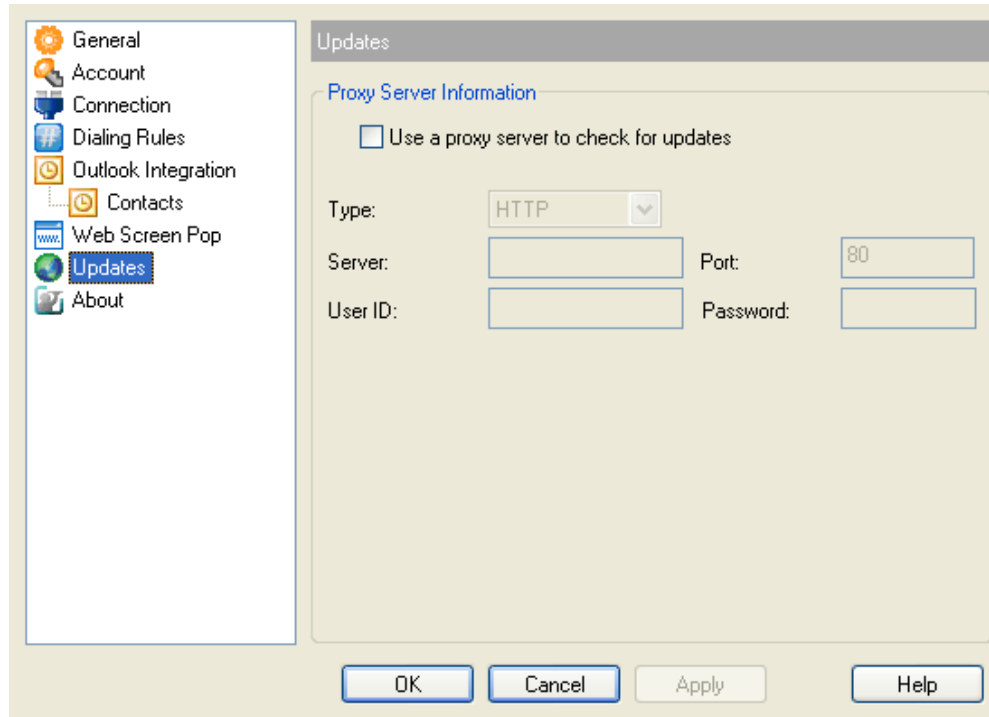


Figure 67 Options Dialog – Update Page

Telephony Toolbar-Corporate uses this proxy only when checking for product updates, not when connecting to the server to provide Call Management features.

Contact your service provider or system administrator if you do not know the appropriate settings.

Use a proxy server to check for updates specifies whether a proxy server is required for Telephony Toolbar to access the internet. When this box is checked, the other settings on this page become enabled.

- *Type* specifies the connection protocol used by the proxy server. The valid option is HTTP.
- *Server* specifies the URL of the proxy server.
- *Port* specifies the port number used by the proxy server. The default port of the HTTP protocol is 80.
- *User ID* specifies a user ID authorized to use the proxy.
- *Password* corresponds with the user ID mentioned above.

4.7 Web Screen Pop

The *Web Screen Pop* page allows you to configure a web page that you can open from the call notification window.

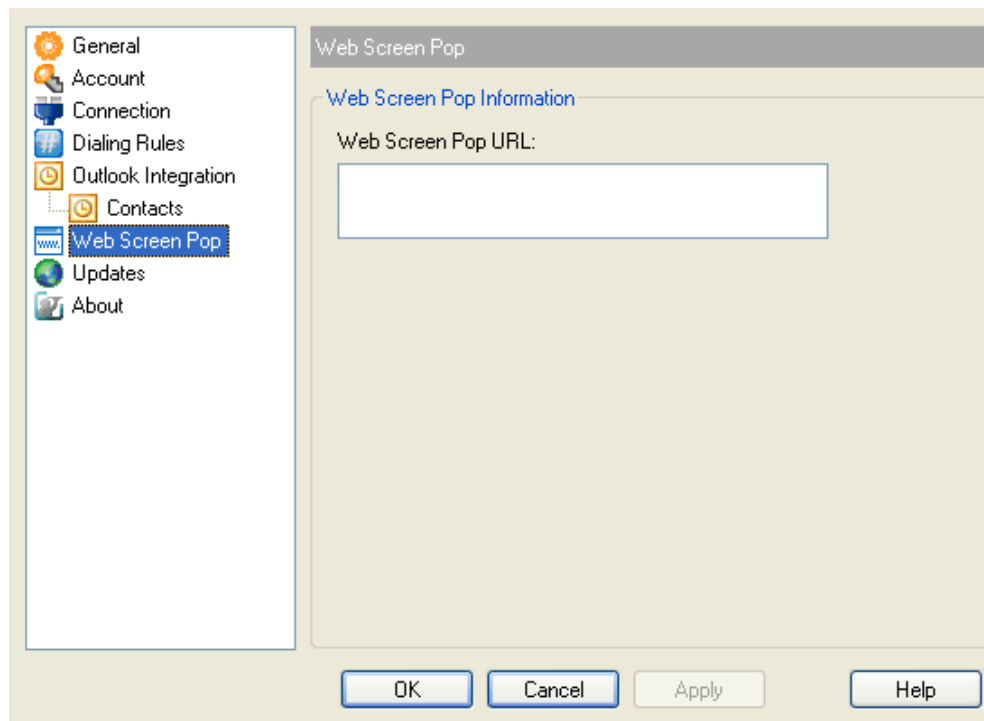


Figure 68 Options Dialog – Web Screen Pop Page

The *Web Screen Pop URL* determines the URL that Telephony Toolbar opens using the default browser when you click **Web Screen Pop** in the Call Notification pop-up window. In addition to the URL, there are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- **__USER__**: The user's ID. (Note that in this case the "user" is the subscriber.)
- **__FIRST__**: The first name of the user.
- **__LAST__**: The last name of the user.
- **__EMAIL__**: The e-mail address of the user.
- **__GROUP__**: The name of the group the user belongs to.
- **__SERVICE_PROVIDER__**: The name of the service provider the user belongs to.
- **__PHONE__**: The phone number of the user.
- **__REMOTE_PHONE__**: The phone number of the remote party.
- **__REMOTE_NAME__**: The name of the remote party (when available).
- **__CALL_TYPE__**: "Incoming" or "Outgoing".

4.8 About

The *About* page displays the version, copyright notices, and product disclaimers associated with Telephony Toolbar. It can be useful when providing information to support representatives for your service provider.

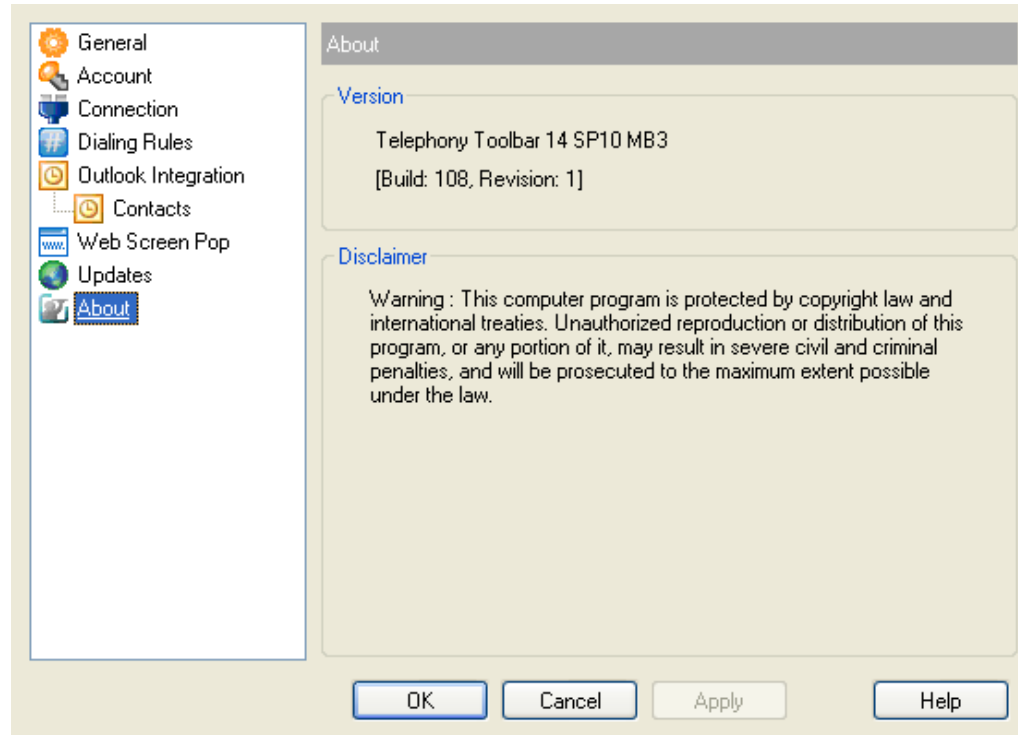


Figure 69 Options Dialog – About Page

The information displayed is as follows:

- Telephony Toolbar-Corporate Version
- Telephony Toolbar-Corporate Disclaimer

The About information is important in providing information for the purpose of technical support.

5 Services Dialog

The *Services* dialog allows you to configure the calling features provided by Telephony Toolbar, such as Voice Messaging, CommPilot Express profiles, Call Forwarding, and Call Waiting. The left hand side of the dialog contains a tree view listing the configuration pages you can access. The configuration pages you select in the tree view are displayed on the right.

- Click **OK** to save all changes and close the dialog.
- Click **Apply** to save all changes without closing the dialog.
- Click **Cancel** to close the dialog without saving your changes.

5.1 Incoming Calls

The *Incoming Calls* pages in the *Options* dialog configure the services that apply to calls that you receive.

5.1.1 Anonymous Call Rejection

The Anonymous Call Rejection service blocks all incoming calls from people who have restricted their phone numbers from being shown to their call recipients.

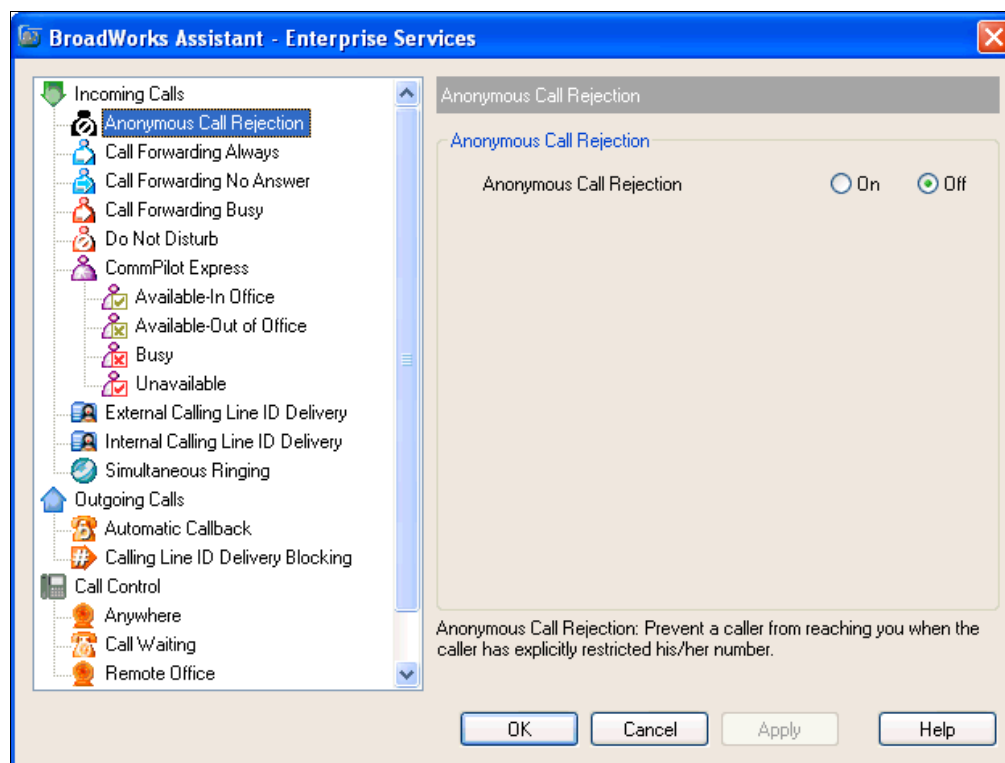


Figure 70 Services Dialog – Anonymous Call Rejection Page

5.1.2 Call Forwarding Always

The Call Forwarding Always service forwards all incoming calls to a specified phone number.

To activate this service, click **Call Forwarding Always** on the toolbar. This highlights the button.

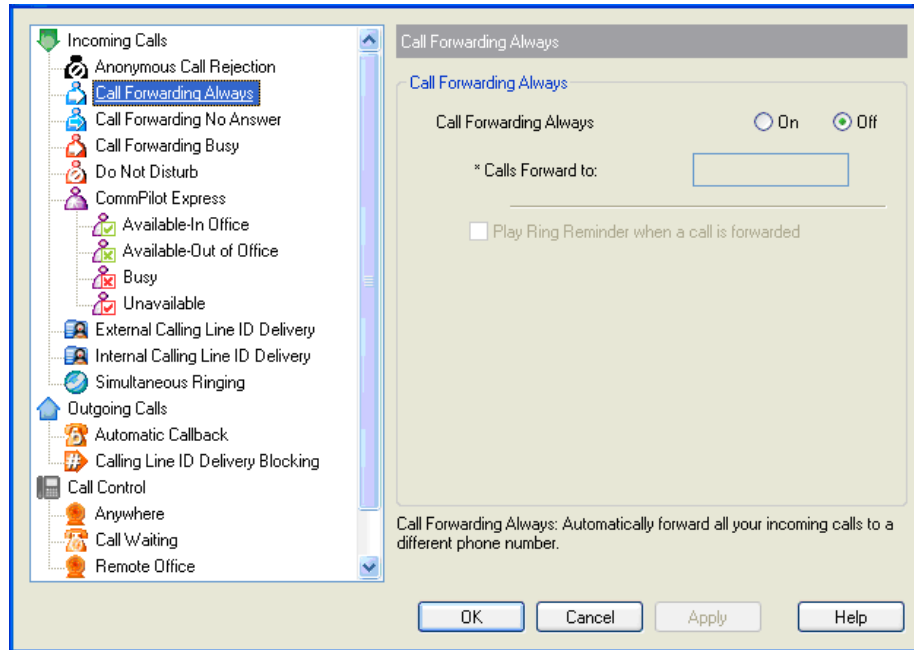


Figure 71 Services Dialog – Call Forwarding Always Page

5.1.3 Call Forwarding No Answer

The Call Forwarding No Answer service forwards all incoming calls to a specified phone number if you do not answer within a specified number of rings.

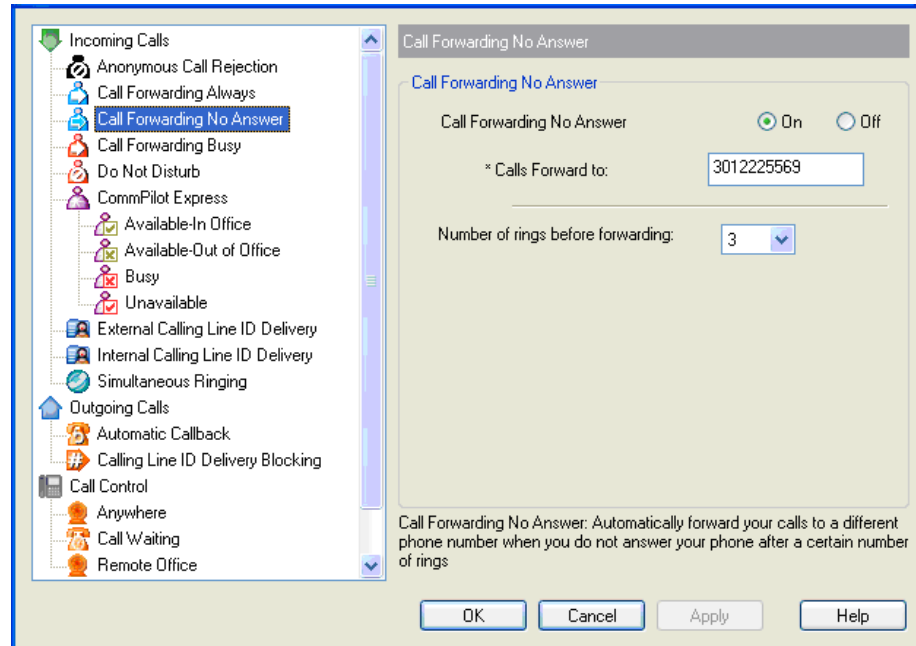


Figure 72 Services Dialog – Call Forwarding No Answer Page

To activate this service, click **Call Forwarding No Answer** on the toolbar. This is highlighted when turned on.

Calls Forward to specifies the phone number to which Telephony Toolbar redirects all calls forwarded using this service.

Numbers of rings before forwarding is the number of times your phone must ring before Telephony Toolbar forwards an incoming call.

5.1.4 Call Forwarding Busy

The Call Forwarding Busy service forwards all incoming calls to a specified phone number when all available lines are in use.

To activate this service, click **Call Forwarding** on the toolbar. This button becomes depressed when on.

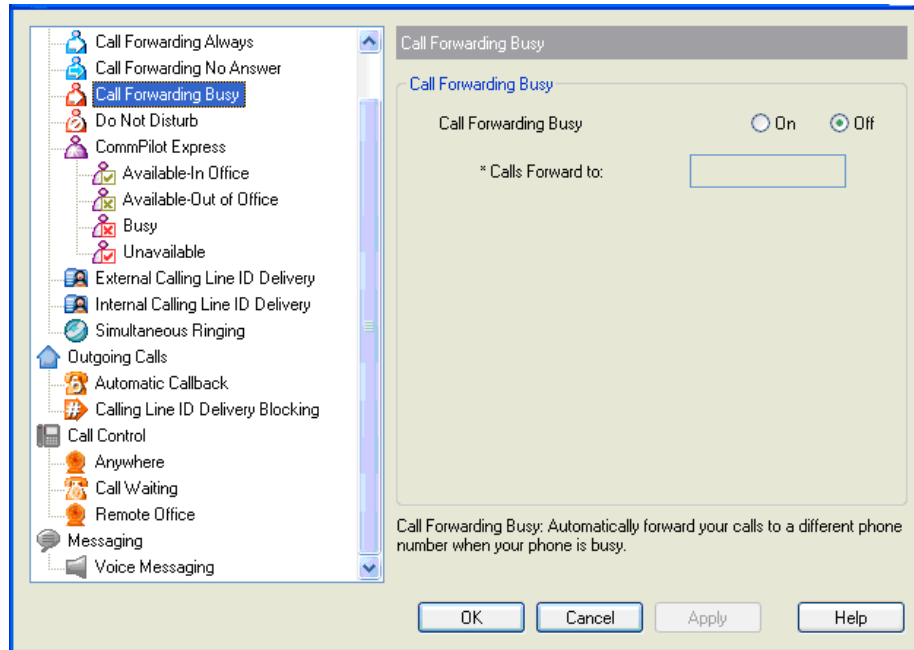


Figure 73 Services Dialog – Call Forwarding Busy Page

5.1.5 Do Not Disturb

The Do Not Disturb service forwards all incoming calls to your Voice Messaging service. If you do not have a Voice Messaging service configured, callers hear a busy tone.

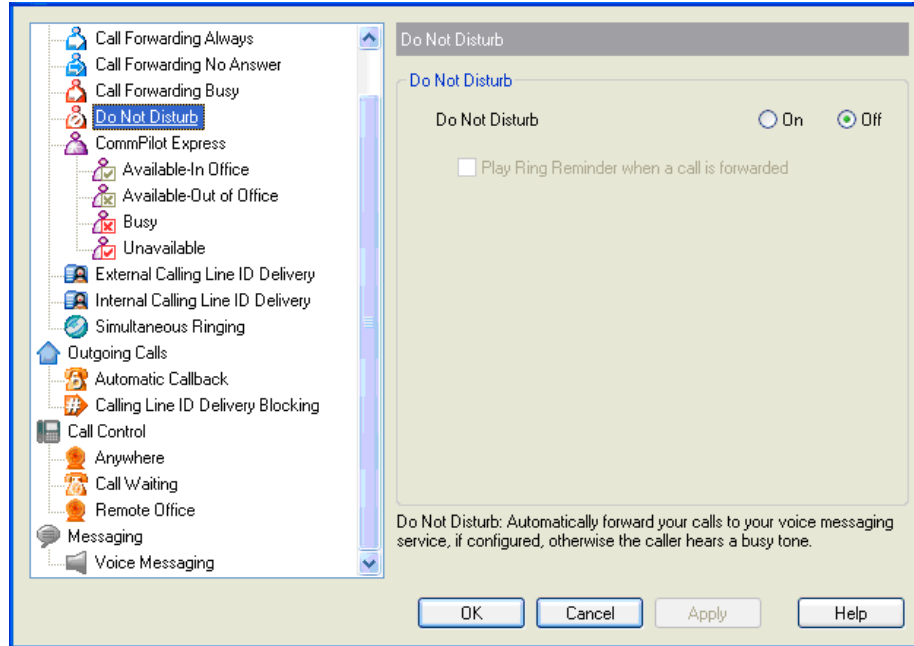


Figure 74 Services Dialog – Do Not Disturb Page

To activate this service, click **Do Not Disturb** on the toolbar. This is highlighted when in service.

Play Ring Reminder when a call is forwarded determines whether Telephony Toolbar notifies you each time the Do Not Disturb service forwards a call to your Voice Messaging service.

5.1.6 External Calling Line ID Delivery

The External Calling Line ID Delivery service allows you to view the calling line information for incoming calls from external phone numbers.

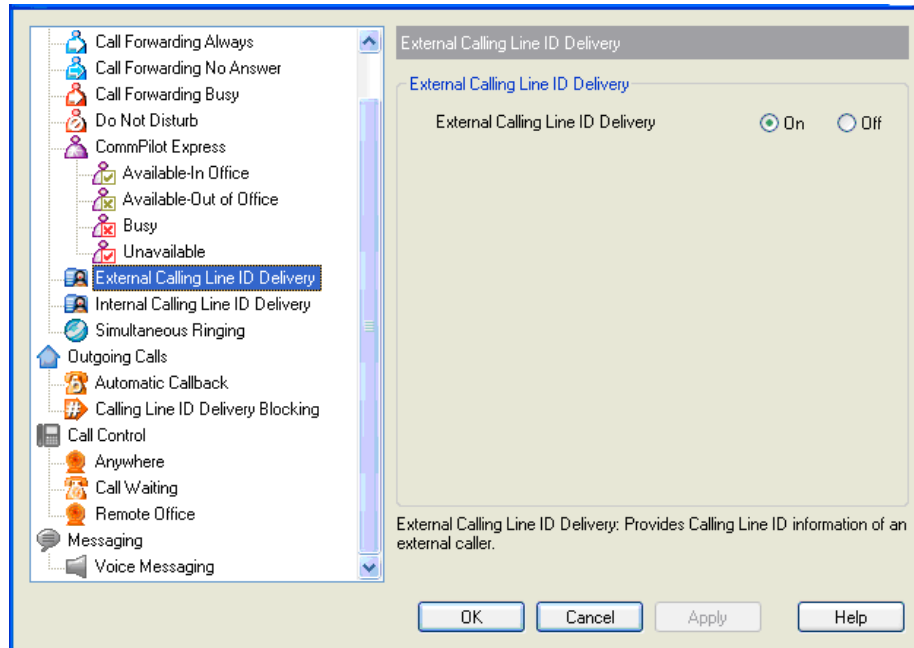


Figure 75 Services Dialog – External Calling Line ID Delivery Page

5.1.7 Internal Calling Line ID Delivery

The Internal Calling Line ID Delivery service allows you to view the calling line information for incoming calls from members of your group.

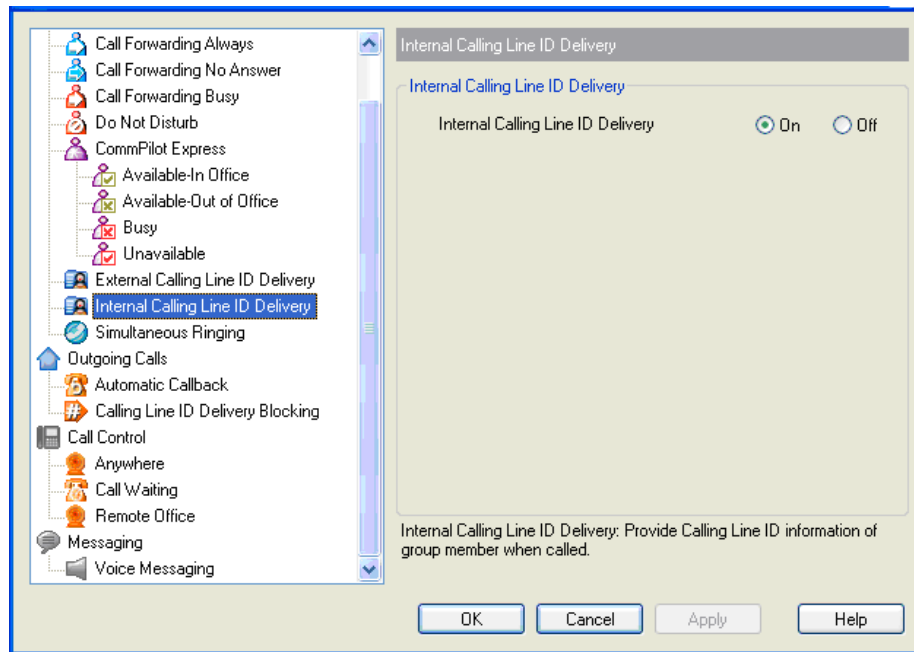


Figure 76 Services Dialog – Internal Calling Line ID Delivery Page

5.1.8 Simultaneous Ringing

The Simultaneous Ringing service rings multiple phone numbers for each incoming call. Any of the phone numbers specified for this service may be used to answer those calls.

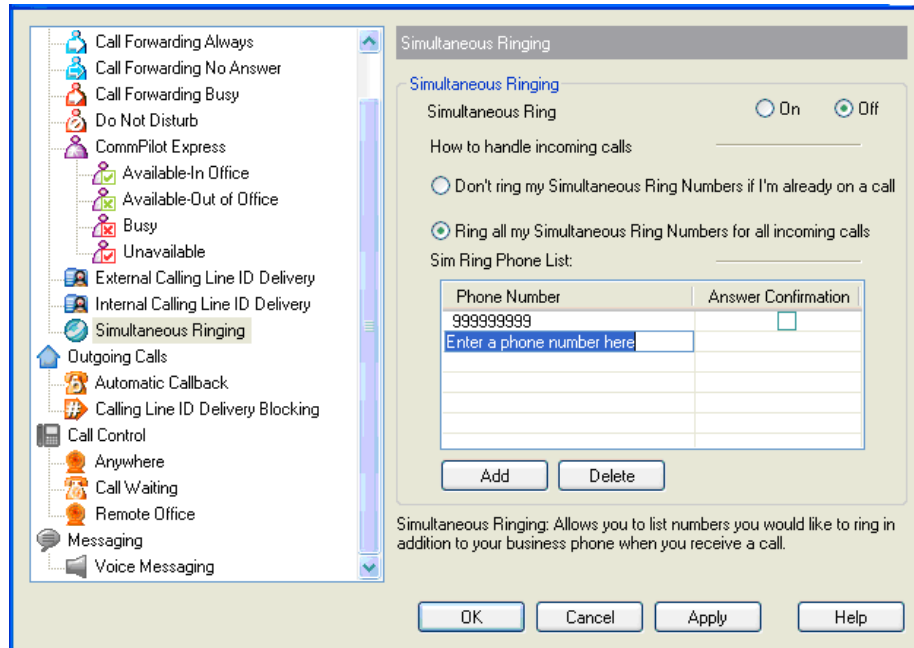


Figure 77 Services Dialog – Simultaneous Ringing Page

To open this page, click **Simultaneous Ringing** on the toolbar. This becomes highlighted when activated.

When the *Don't ring my Simultaneous Ring Numbers if I'm already on a call* option is selected, the Simultaneous Ringing service is temporarily deactivated whenever you are engaged in an active call.

When the *Ring all my Simultaneous Ring Numbers for all incoming calls* option is selected, the Simultaneous Ringing service rings all numbers specified in the list that follows for each incoming call, regardless of whether you currently are engaged in an active call.

Sim Ring Phone List specifies the list of additional phone numbers that ring for each incoming call. The *Answer Confirmation* column allows you to specify, for each number separately, whether answer confirmation is required.

You can perform the following on the *Sim Ring Phone List*.

- View the Sim Ring phone list and the current status of Answer Confirmation option for each number in the List
- Add a new number to the Sim Ring Phone List and set its Answer Confirmation option "On" or "Off"
- Modify an existing number in the Sim Ring Phone List by double-clicking on the number
- Set the Answer Confirmation option "On" or "Off" for any phone number listed on the Sim Ring Phone List

NOTE: The Answer Confirmation capability is available only if this feature is activated.

- Delete an existing number from the Sim Ring Phone List.
 - 1) To add a new phone number, click **Add**. A new item with the text, *Double click to add number here* prompt is inserted into the list control, allowing you to enter the required information.
 - 2) To modify an existing phone number, double-click the number and then modify the information, as required.
 - 3) To set the Answer Confirmation status of a phone number, “On” or “Off”, check or uncheck the corresponding Answer Confirmation check box.
 - 4) To delete a phone number, select the number and click the *Delete* button.

5.1.9 CommPilot Express

NOTE: When using CommPilot Express, you should not enable other services such as Call Notify, Call Forwarding, or Simultaneous Ringing.

CommPilot Express allows you to manage your personal services using four configurable profiles. These profiles control your incoming calls automatically. Even when off-site, you can still manage your active profile on the web or over the phone.

With CommPilot Express, you can manage your calls based on your schedule. This allows you to work efficiently without unnecessary interruption.

- 1) To set the active CommPilot Express profile, select a profile from the *CommPilot* drop-down list on the toolbar.
- 2) To disable all profiles, select *CommPilot – None*.

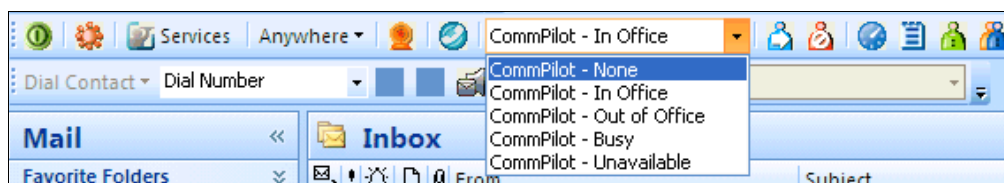


Figure 78 CommPilot Profiles

You can also set the active CommPilot Express profile on the *CommPilot Express* page of the *Services* dialog. The *Services* dialog for Telephony Toolbar–Enterprise allows you to configure the settings that apply to each of your CommPilot profiles.

5.1.9.1 Available - In Office

The Available – In Office profile determines how incoming calls are handled when you are working at your desk.

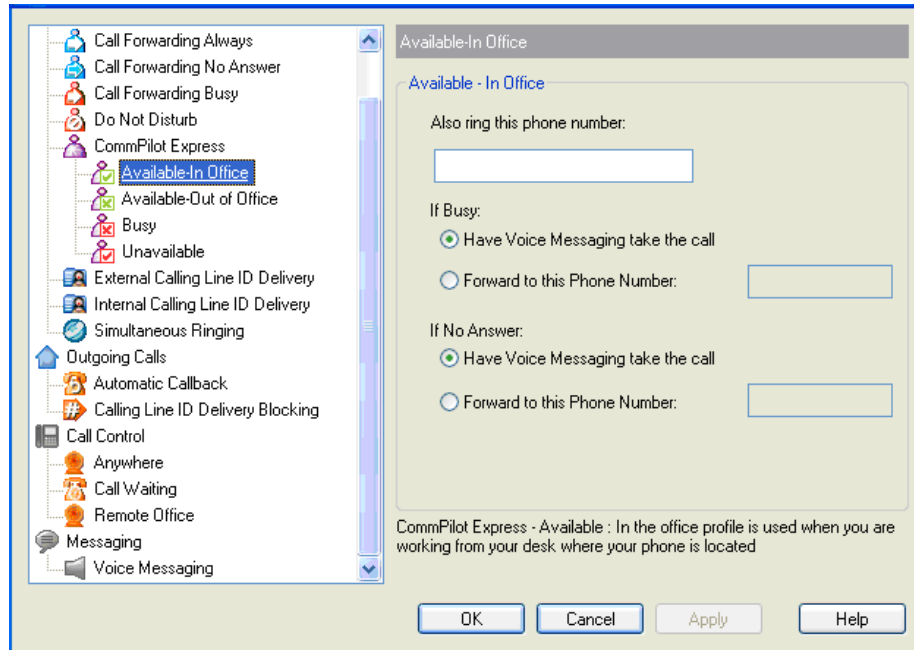


Figure 79 Services Dialog – CommPilot Express: Available – In Office Page

Also ring this phone number specifies an additional number for Telephony Toolbar to ring for each incoming call. Calls may be answered from either this number or your main number.

If you select:

- *If Busy: Have Voice Messaging take the call*, Telephony Toolbar forwards all incoming calls to your Voice Messaging service if you have no available open lines.
- *If Busy: Forward to this Phone Number*, then all incoming calls are forwarded to the specified phone number if you have no available lines.
- *If No Answer: Have Voice Messaging take the call*, Telephony Toolbar forwards all incoming calls to your Voice Messaging service if you do not answer after a set number of rings.
- *No Answer: Forward to this Phone Number*, Telephony Toolbar forwards all incoming calls to the specified phone number if you do not answer after a set number of rings.

5.1.9.2 Available – Out of Office

The Available – Out of Office profile determines how incoming calls are handled when you are not working at your desk, but are still able to receive calls.

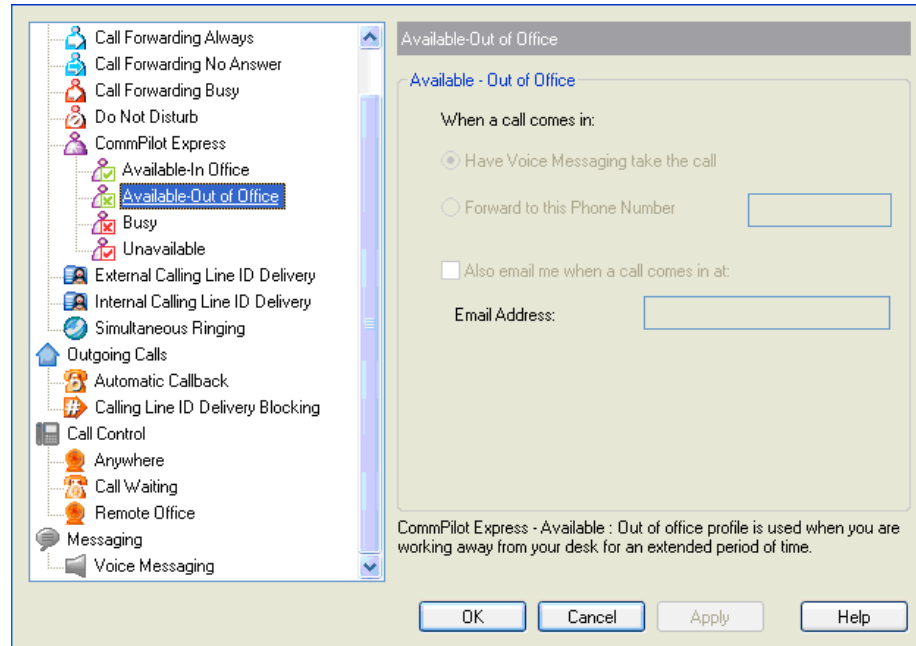


Figure 80 Services Dialog – CommPilot Express: Available – Out of Office

If you select:

- *Have Voice Messaging take the call*, all incoming calls are forwarded to your Voice Messaging service.
- *Forward to this Phone Number*, Telephony Toolbar forwards all incoming calls to a specified number.

Also e-mail me when a call comes in at determines whether Telephony Toolbar also sends an e-mail notification to the address you specify below it each time you receive an incoming call.

The *E-mail address* specifies the e-mail address Telephony Toolbar notifies when you receive an incoming call.

5.1.9.3 Busy

The Busy profile determines how incoming calls are handled when you are busy.

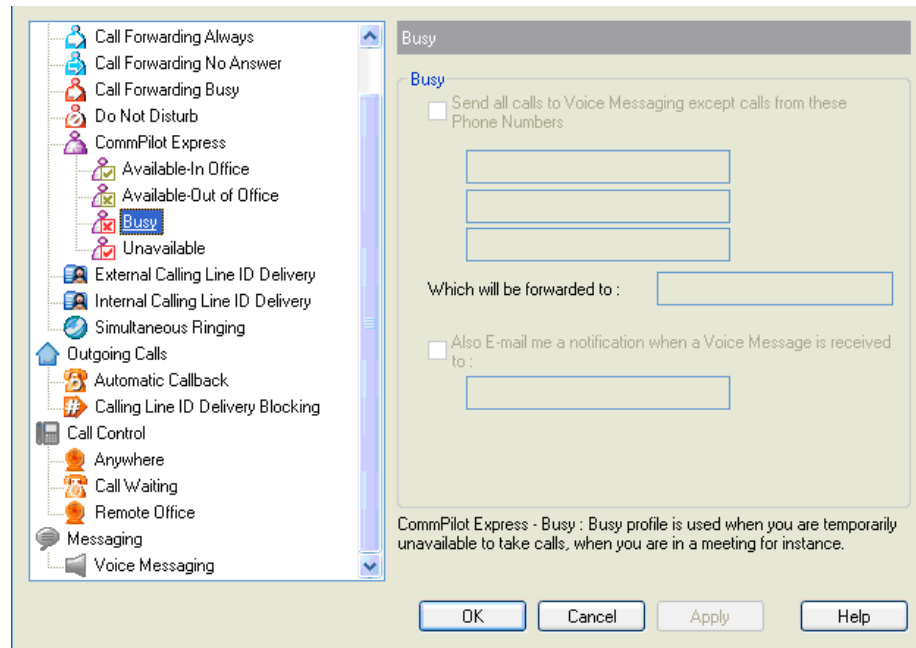


Figure 81 Services Dialog – CommPilot Express: Busy Page

- *Send all calls to Voice Messaging except calls from these Phone Numbers* forwards all incoming calls to your Voice Messaging service, when selected. You can configure up to three numbers to be excluded from this service in the blank fields provided. Calls to these numbers are instead forwarded to the phone number you specify below it.
- *Which will be forwarded to* determines the phone number to which Telephony Toolbar forwards the excluded callers specified above.
- *Also E-mail me a notification when a Voice Message is received* should be selected to receive an e-mail notification each time you receive a Voice Mail message.

5.1.9.4 Unavailable

The Unavailable profile determines how incoming calls are handled when you are not free to take calls, such as during outside business hours or when on holidays.

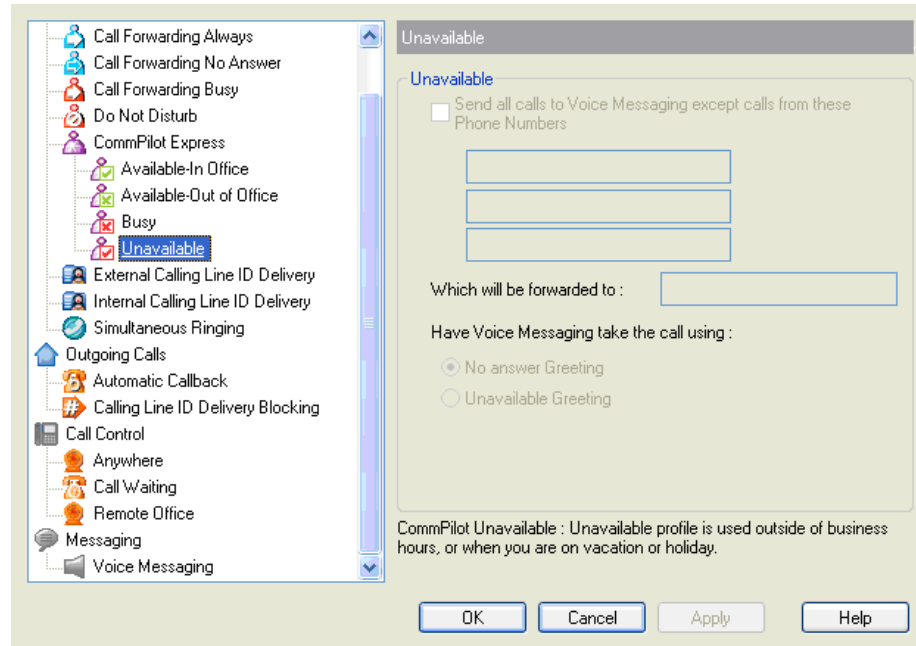


Figure 82 Services Dialog – CommPilot Express: Unavailable Page

If you select:

- *Send all calls to Voice Messaging except calls from these Phone Numbers*, all incoming calls are forwarded to your Voice Messaging service. You can configure up to three numbers to be excluded from this service in the blank fields provided. Calls to these numbers are instead forwarded to the phone number you specify. To determine which phone number Telephony Toolbar forwards the excluded callers to, select *Which will be forwarded to*.
- *No answer Greeting*, its standard “no answer” greeting message plays to incoming calls.
- *Unavailable Greeting*, your Voice Messaging service is enabled to play its standard “unavailable” greeting message to incoming calls.

5.2 Outgoing Calls

The *Outgoing Calls* pages in the *Options* dialog configure the services that apply to calls that you initiate.

5.2.1 Automatic Callback

The Automatic Callback service allows you to have Telephony Toolbar monitor a busy party in your group and to automatically establish a call on your behalf when the busy party becomes available.

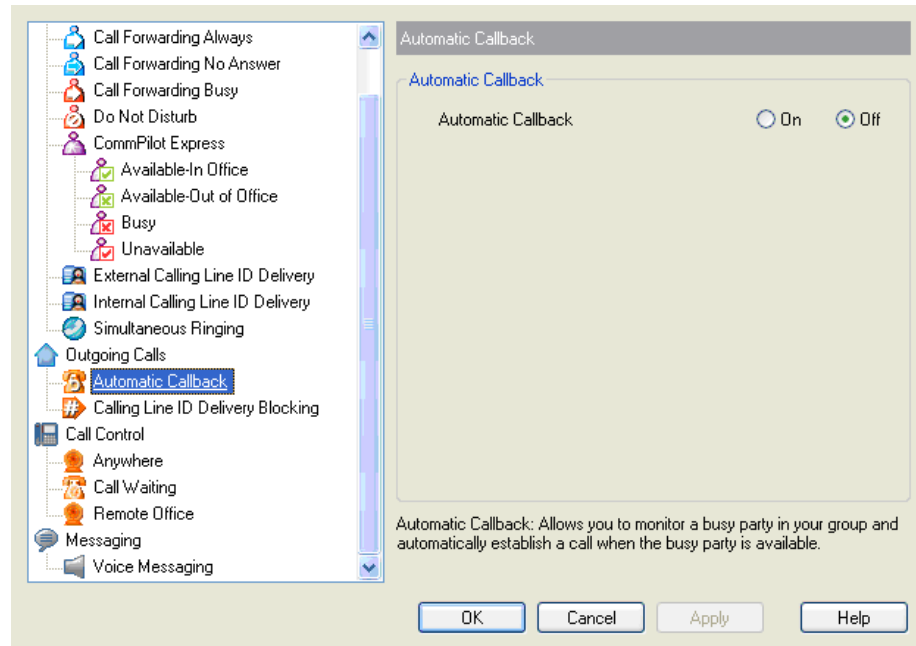


Figure 83 Services Dialog – Automatic Callback

5.2.2 Calling Line ID Delivery Blocking

The Calling Line ID Delivery Blocking service prevents other parties from seeing your phone number or calling line information when engaged in calls with you.

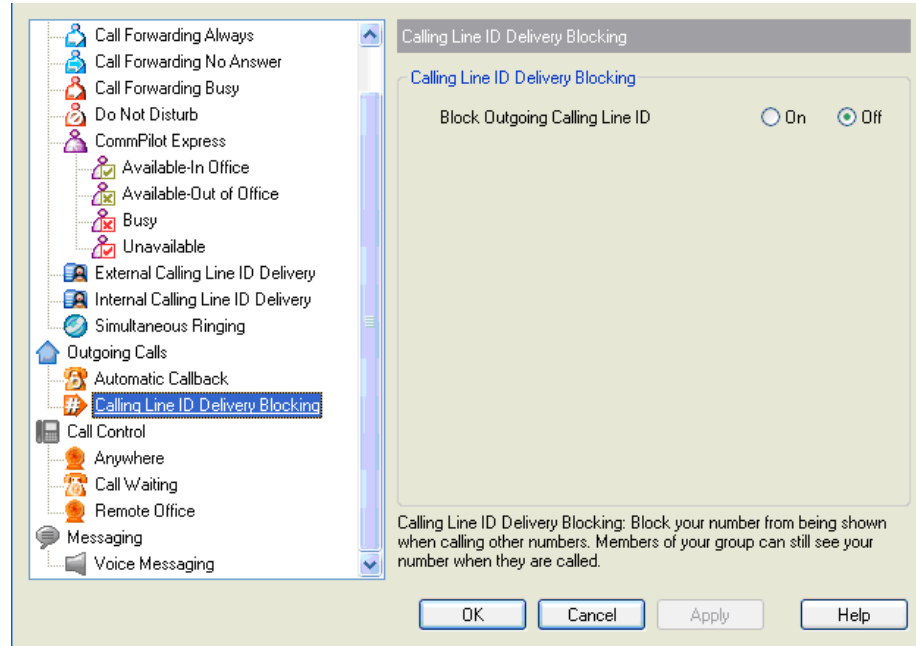


Figure 84 Services Dialog – Outgoing Calls: Calling Line ID Delivery Blocking

5.3 Call Control

The *Call Control* pages in the *Options* dialog allow you to configure your Call Control services.

5.3.1 Remote Office

The Remote Office service allows you to substitute a different phone number for your office phone number. You can open this page by clicking Remote Office on the toolbar. The button is highlighted when turned on.

Remote Office Number specifies the alternate phone number to substitute for your office number.

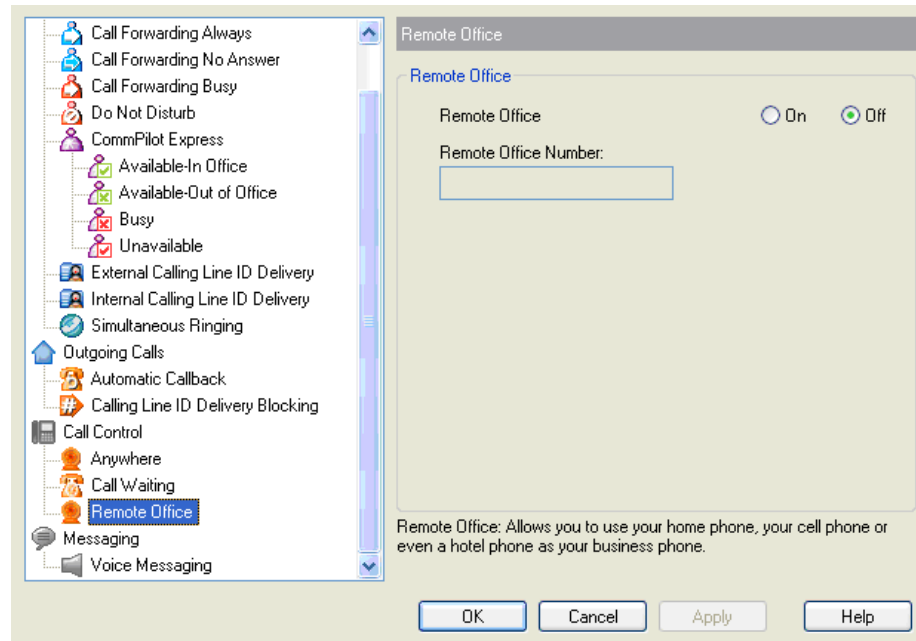


Figure 85 Services Dialog – Call Control: Remote Office

5.3.2 Call Waiting

The Call Waiting service allows you to answer incoming calls while engaged in another active call.

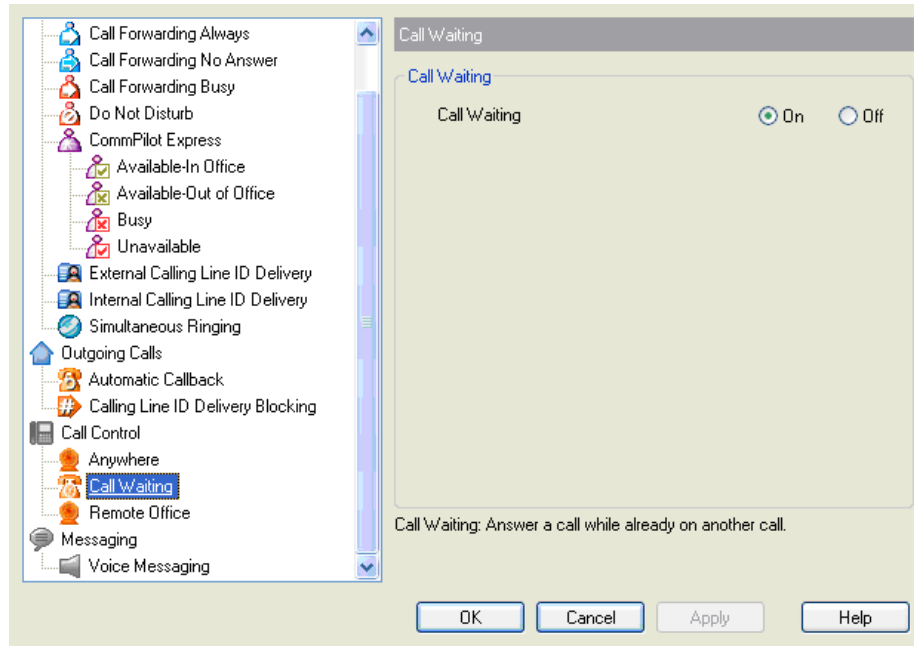


Figure 86 Services Dialog – Call Control: Call Waiting

5.4 Messaging

The *Messaging* pages in the *Options* dialog allow you to configure your Voice Messaging settings.

5.4.1 Voice Messaging

The *Voice Management* page specifies how the system handles your voice messages.

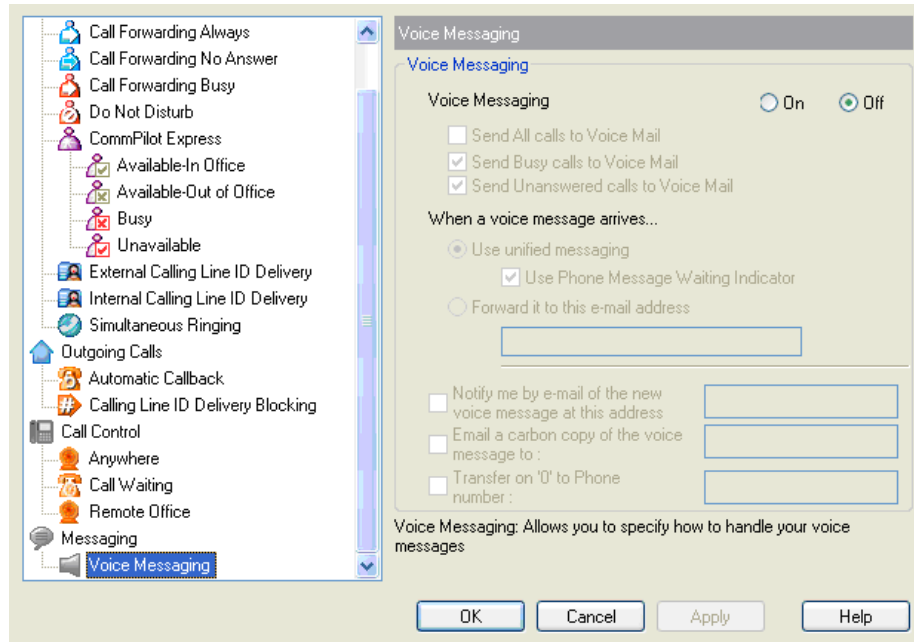


Figure 87 Services Dialog – Messaging: Voice Messaging

You can select how you want the calls to be treated by selecting from the following: *Send All Calls to Voice Mail*, *Send Busy Calls to Voice Mail*, and *Send Unanswered Calls to Voice Mail*. Changes made via the web portal are not reflected in real time for Telephony Toolbar–Corporate. You must log in again to see the new values.

When the *Use unified messaging* option is selected, you can access your voice messages via e-mail and phone. Messages are sent as mail attachments to the e-mail address configured for your account.

“*Use Phone Message Waiting Indicator*” determines whether your phone provides an alternate dial tone and a visual indicator on some phone models to indicate that you have a message waiting.

If the “*Forward it to this e-mail address*” option is selected you will be able to access your voice messages only by e-mail. Messages are sent as mail attachments to the specified e-mail address, and are not available for retrieval by phone.

“*Notify me by e-mail of the new voice message at this address*” determines whether the system sends a notification e-mail to the specified address each time it records a voice mail. This notification will contain the date and time the voice message was recorded, but does not contain the content of the voice message itself as an attachment.

6 Troubleshooting

This section contains information that may aid those having difficulty using Telephony Toolbar-Corporate. If your problem is not listed in the index, contact your service provider for assistance.

6.1 Using Telephony Toolbar-Corporate with Microsoft Windows Service Pack 2 (SP2)

When you open the Group Directory or Personal Directory from the toolbar, Internet Explorer or Firefox may display the following warning message:

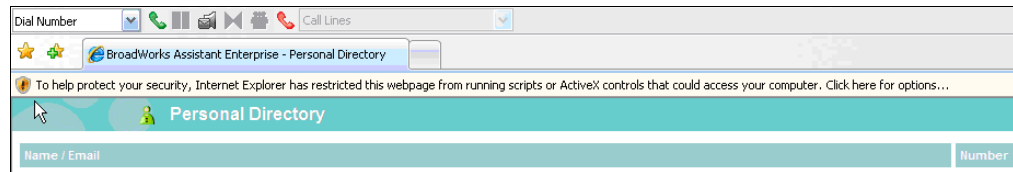


Figure 88 Internet Explorer Warning

This warning is triggered by the JavaScript used by Telephony Toolbar-Corporate to sort directory listings.

The following instructions override the warning and open the directory:

- 1) Click the message.
The notification turns blue and displays a pop-up menu.
- 2) Select *Allow Blocked Content* from the pop-up menu.

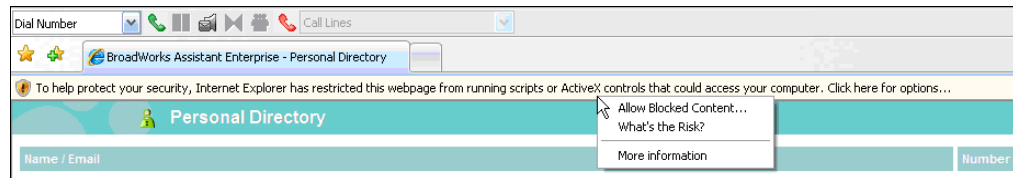


Figure 89 Internet Explorer Warning

Another security warning appears.

- 3) Click **Yes**.

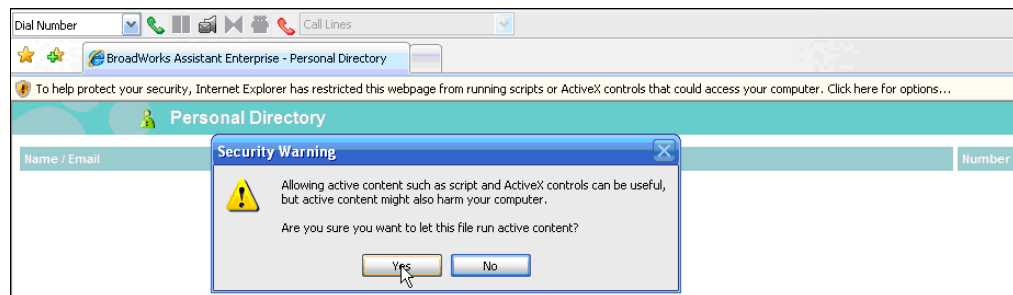


Figure 90 Internet Explorer Security Warning

6.2 Telephony Toolbar Not Visible in Outlook

If the Telephony Toolbar is not visible in Outlook, follow these steps. If the problem is not solved, contact your service provider.

To confirm that Telephony Toolbar-Corporate is installed:

- 1) Open Internet Explorer.
- 2) Click the Options icon in the Telephony Toolbar.
- 3) Click **General** in the tree view on the left of the *Options* dialog.
- 4) Verify that the “version” area of the page lists *Telephony Toolbar-Corporate*.

Make Telephony Toolbar-Corporate visible:

- 1) Right-click an empty area of the toolbar region in Outlook.
A menu appears listing all the toolbars currently registered.
- 2) Make sure that the Telephony Toolbar entries (*Telephony Toolbar Call Control* and *Telephony Toolbar Services*) are checked, as shown in *Figure 91 Outlook Toolbar Options*.

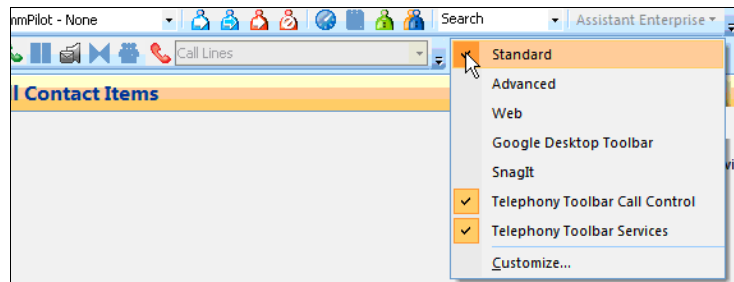


Figure 91 Outlook Toolbar Options

If the Telephony Toolbar entries are not listed, continue with the next step.

6.3 Register Telephony Toolbar within Outlook

- 1) Click on Help or About Microsoft Office Outlook.

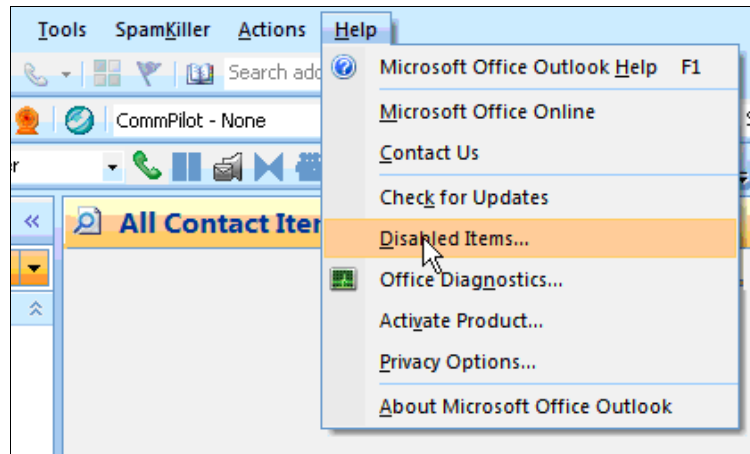


Figure 92 Help Dialog, Disabled Items

- 2) In the dialog box select *Disabled Items*. If the *Telephony Toolbar* is visible on the list, click **Enable** and restart Outlook.

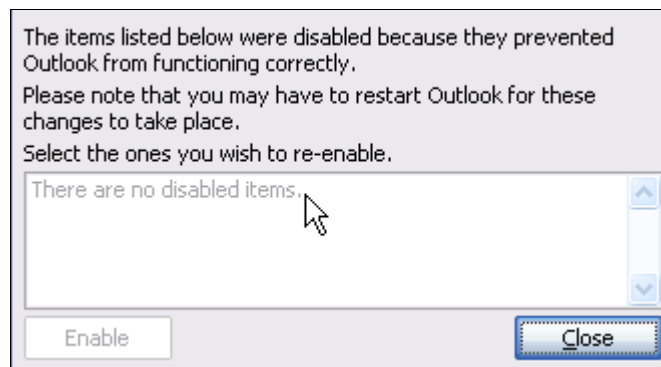


Figure 93 Disabled Items Dialog

6.4 I Have Not Been Licensed to Use Telephony Toolbar

This error indicates that your service provider has not added the Client License to your list of services.

Contact your service provider to activate Telephony Toolbar for your account.

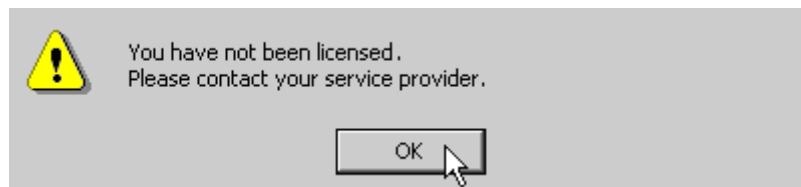


Figure 94 License Notification

6.5 Telephony Toolbar Not Visible in Internet Explorer

If the Telephony Toolbar is not visible in Microsoft Internet Explorer, follow these steps:

- 1) Right-click an empty area of the toolbar region in Explorer.
A menu appears listing all the toolbars currently registered.
- 2) Make sure that the Telephony Toolbar entries (*Telephony Toolbar Call Control*, *Telephony Toolbar Services* for Telephony Toolbar-Corporate) are checked, shown in *Figure 95 Internet Explorer Toolbar Options*.

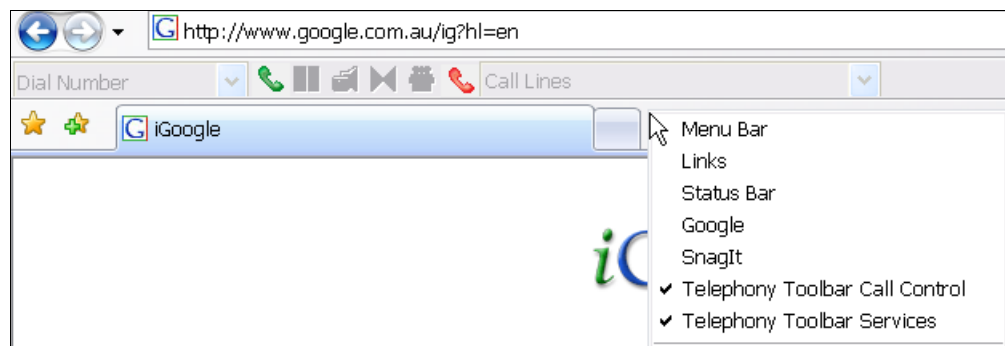


Figure 95 Internet Explorer Toolbar Options

If your problem is still not solved, contact your service provider.

Index

- About, 47
- About this guide, 10
- Anonymous Call Rejection, 48
- Answer button, 21
- Answering calls, 28
- Automatic Callback, 62
- Available-In Office, 58
- Available-Out of Office, 59
- Blind Transfer, 29
- Blind Transfer button, 21
- Busy, 60
- Buttons, 18
- Call Control, 64
 - Call Waiting, 67
 - Remote Office, 66
- Call Forwarding Always, 49
- Call Forwarding Always button, 19
- Call Forwarding Busy, 51
- Call Forwarding Busy Service button, 19
- Call Forwarding No Answer, 50
- Call Forwarding No Answer Service button, 19
- Call History, 32
 - Deleting call logs, 33
 - Viewing call logs, 33
- Call History button, 20
- Call History, dialing from, 26
- Call Lines button, 22
- Call Waiting, 67
- Call, making, 22
- Calling Line ID Delivery Blocking, 63
- Calls
 - Answering, 28
 - Ending, 32
 - Holding, 31
 - Receiving, 28
- Change password, 37
- CommPilot Express, 57
 - Available-In Office, 58
 - Available-Out of Office, 59
 - Busy, 60
 - Unavailable, 61
- Conference Call button, 21
- Conference, initiating N-Way, 31
- Conference, initiating Three-Way, 31
- Contact list, dialing from, 24
- Contacts, Outlook Integration, 41
- Current CommPilot Profile button, 19
- Dial Contact button, 21
- Dial Number button, 21
- Dialing
 - From Call History, 26
 - From contact list, 24
 - From e-mail, 23
 - From group directory, 26
 - From personal directory, 25
 - From search, 27
 - From speed dial directory, 27
 - From vCard, 24
 - From web page, 22
 - New number, 22
 - Previously dialed number, 22
- Dialing number, 22
- Dialing Rules, 39
- Do Not Disturb, 52
- Do Not Disturb Service button, 20
- E-mail, dialing from, 23
- End Call button, 22
- Ending calls, 32
- External Calling Line ID Delivery, 53
- First time login, 11
- Group Directory button, 20
- Group directory, dialing from, 26
- Hold button, 21
- Holding call, 31
- Incoming Calls
 - Anonymous Call Rejection, 48
 - Call Forwarding Always, 49
 - Call Forwarding Busy, 51
 - Call Forwarding Now Answer, 50
 - CommPilot Express, 57
 - Do Not Disturb, 52
 - External Calling Line ID Delivery, 53
 - Internal Calling Line ID Delivery, 54
 - Simultaneous Ringing, 55
- Initiating N-Way Conference, 31
- Initiating Three-Way Conference, 31
- Internal Calling Line ID Delivery, 54
- Login button, 18
- Login, first time, 11
- Login, subsequent, 16
- Making calls, 22
- Messaging, 68
 - Voice, 68
- New number, dialing, 22
- N-Way Conference, initiating, 31
- Open Telephony Toolbar-Corporate, 10
- Opening URL, 30
- Options
 - About, 47
 - Account page, 36
 - Call Control, 64
 - Connection page, 38
 - Dialing Rules, 39
 - General page, 34
 - Messaging, 68
 - Outlook Integration, 40
 - Updates page, 42

- Web Screen Pop page, 46
- Options button, 18
- Options dialog, 34
- Outgoing calls
 - Automatic Callback, 62
 - Calling Line ID Delivery Blocking, 63
- Outlook Integration, 40
- Outlook Integration, contacts, 41
- Password change, 37
- Personal Directory button, 20
- Personal directory, dialing from, 25
- Previously dialed number, dialing, 22
- Receiving calls, 28
- Remote Office, 66
- Remote Office button, 18
- Retrieving Voice Mail, 32
- Saving vCard, 30
- Search button, 20
- Search, dialing from, 27
- Services
 - Anonymous Call Rejection, 48
 - Automatic Callback, 62
 - Call Forwarding Always, 49
 - Call Forwarding Busy, 51
 - Call Forwarding No Answer, 50
 - Call Waiting, 67
 - Calling Line ID Delivery Blocking, 63
 - CommPilot Express, 57
 - Do Not Disturb, 52
 - External Calling Line ID Delivery, 53
 - Incoming Calls, 48
 - Internal Calling Line ID Delivery, 54
 - Remote Office, 66
 - Simultaneous Ringing, 55
- Services button, 18
- Simultaneous Ringing, 55
- Simultaneous Ringing button, 19
- Speed Dial Directory button, 20
- Speed dial directory, dialing from, 27
- Subsequent login, 16
- Supervised transfer, 29
- Three-Way Conference, initiating, 31
- Toolbar, 18
- Transfer to Voice Mail button, 21
- Transfer, blind, 29
- Transfer, supervised, 29
- Transferring, to Voice Mail, 32
- Troubleshooting, 69
 - Telephony Toolbar not visible in Internet Explorer, 72
 - Telephony Toolbar-Corporate not visible in Outlook, 70
 - Telephony Toolbar-Corporate with Windows Service Pack 2, 69
 - Not licensed to use Telephony Toolbar, 72
 - Registering Telephony Toolbar-Corporate Telephony Toolbar within Outlook, 71
- Unavailable, 61
- Updates page, 42
- URL, opening, 30
- Using Telephony Toolbar, 18
- vCard
 - Dialing from in Outlook 2000/2002/2003, 24
 - Dialing from in Outlook 2007, 25
 - Saving, 30
- Voice Mail
 - Retrieving, 32
 - Transferring to, 32
- Voice Messaging, 68
- Web page, dialing from, 22
- Web Screen Pop, 46