

This plugin can be used for generating calls using Microsoft Outlook (XP or Vista), and the XP or Vista phone dialer which is used by XP's Outlook Express and Vista's Windows Contacts.

Requirements:

- Windows XP SP2 (32-bit)
- Windows Vista (32-bit)


Switchvox Smart Tags will find valid phone numbers in Outlook (2007 only), Word, Excel, and PowerPoint documents, and offer click-to-dial options.

Requirements:

- MS Office 2003 SP3
- MS Office 2007

The Outlook plugin installer will install up to 4 required components, the Microsoft .NET Framework 3.5 (if not already installed), the Switchvox PBXService, Switchvox Smart Tags, and the Switchvox TSP. Be sure to close all windows before launching the installer and allow enough time for them to complete properly.

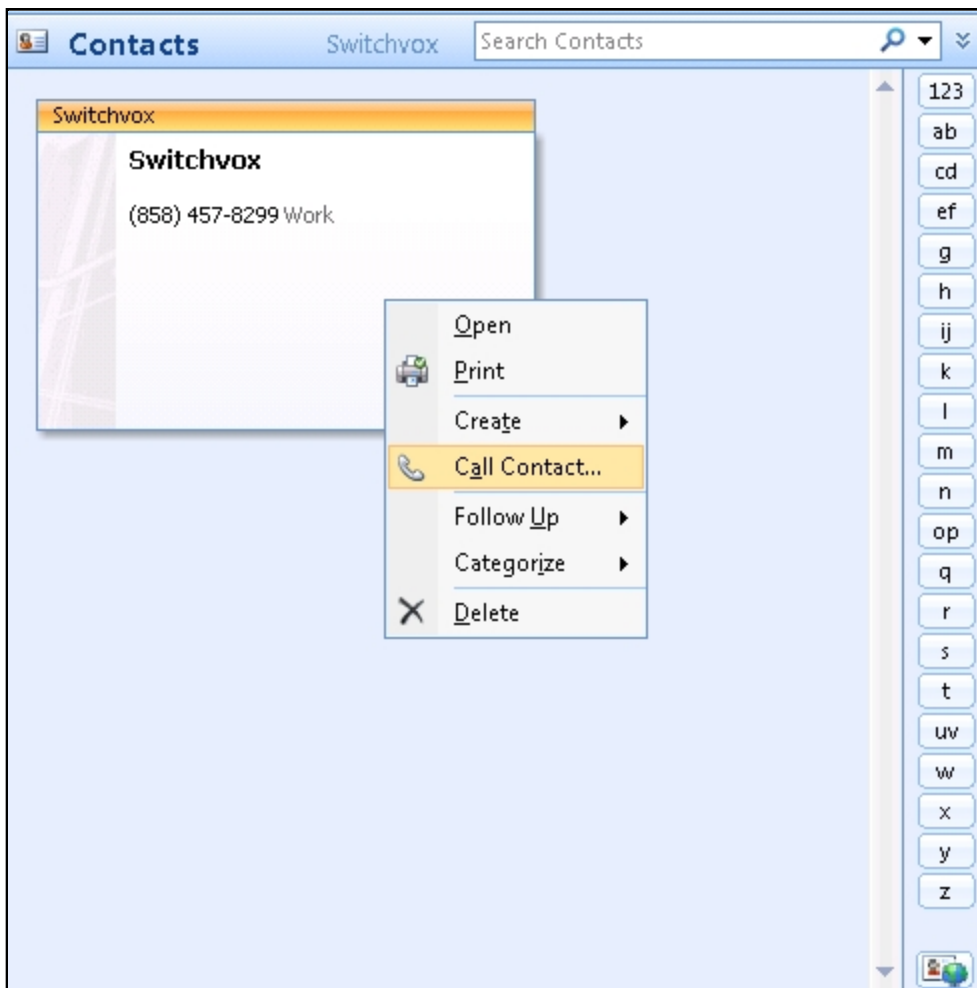
During the installation of the TSP, you will be prompted for your extension's settings. Proceed by entering your phone system's IP, extension number, and password used to access your voicemail. Click the OK button to submit your settings.



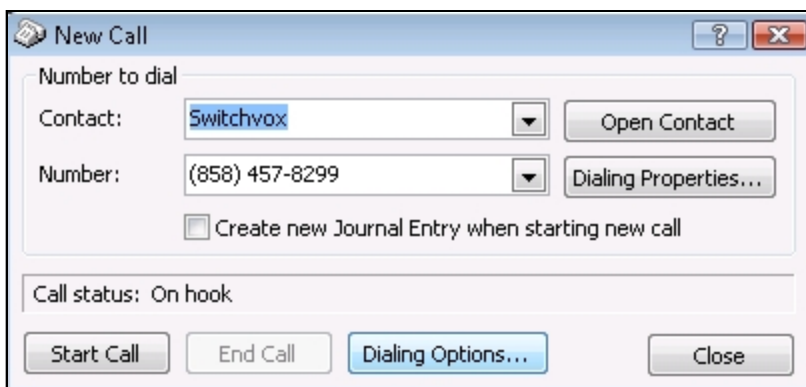
The screenshot shows a dialog box titled "Configure Switchvox TAPI Driver". It features a "Switchvox Login Information" section with three text input fields: "Switchvox PBX" (10.10.3.52), "Extension" (102), and "Password" (*****). Below these fields are "OK", "Apply", and "Cancel" buttons. A "Ready" status bar is at the bottom.

Microsoft Office

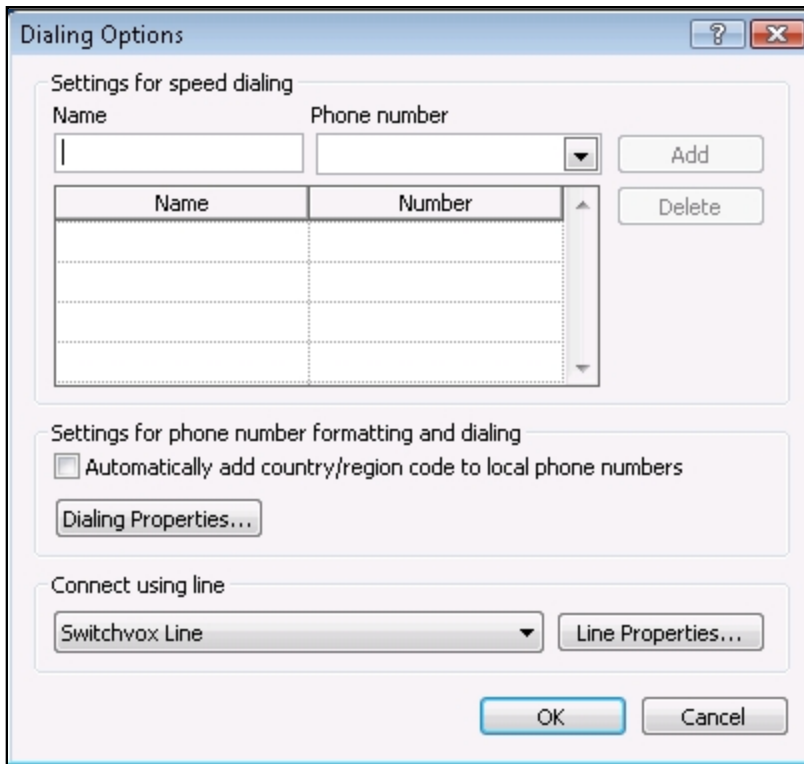
Once the plugin installation is complete, go to the Contacts section of Outlook. Right-click on a contact that has a stored phone number and select Call Contact...



You will now see the New Call interface. Before you can dial the call, you will need to set the dialer to use the Switchvox plugin. To do this, click Dialing Options.



You will now see a page where you can set the option "Connect using line". Select "Switchvox Line" from the drop down then click OK.

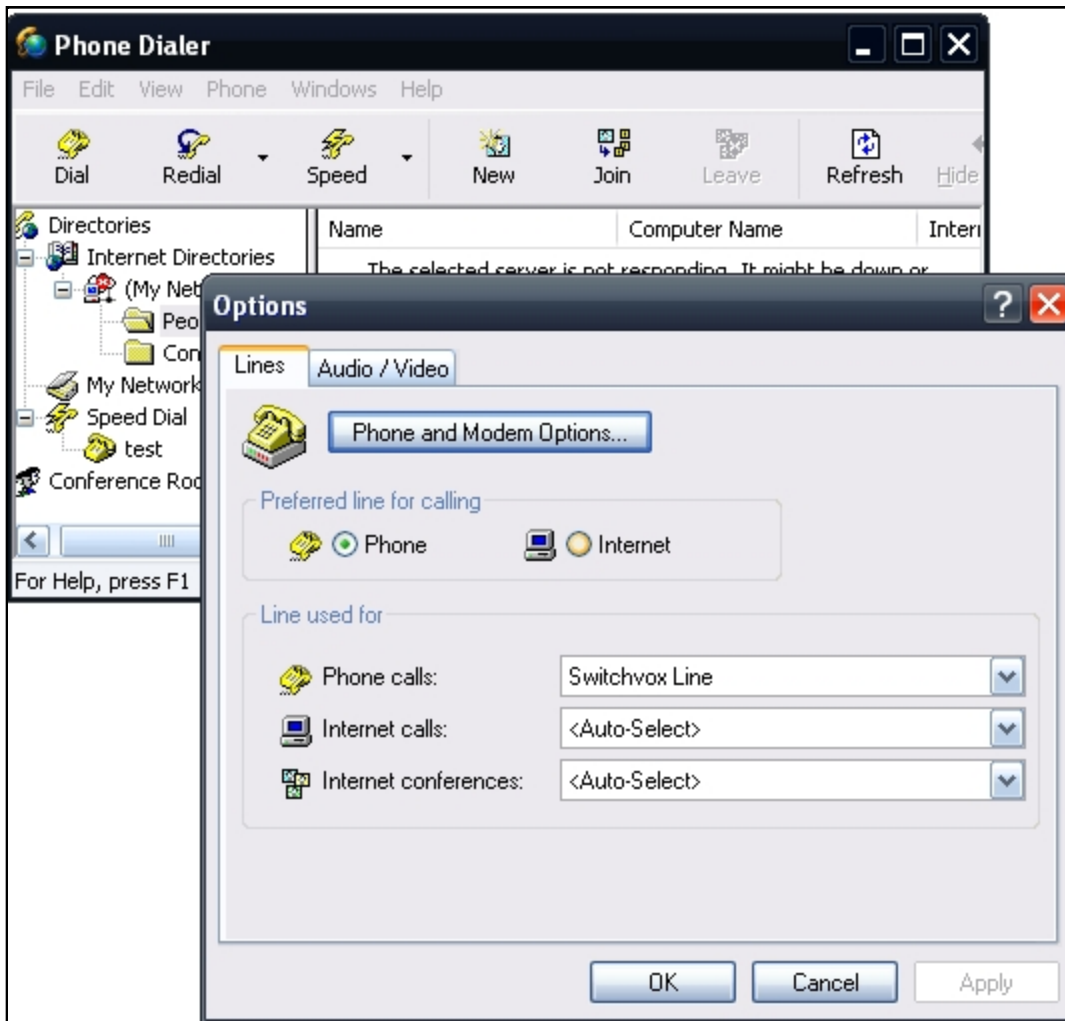


You can now place calls by pressing the Start Call button from a New Call window. Once the call is complete, press End Call before initiating your next call.

Outlook Express (Windows XP)

To place calls to phone numbers stored in Outlook Express' Contacts, you will need to set XP's Dialer to use the Switchvox Line. To do this, click the Start Menu and select the Run... option. Enter "dialer" in the field then press the Enter key to launch the dialer.

Once the dialer is launched, go to Edit->Options. Select Switchvox Line from the dropdown for Phone Calls. Click OK to submit the change and then close the Phone Dialer.

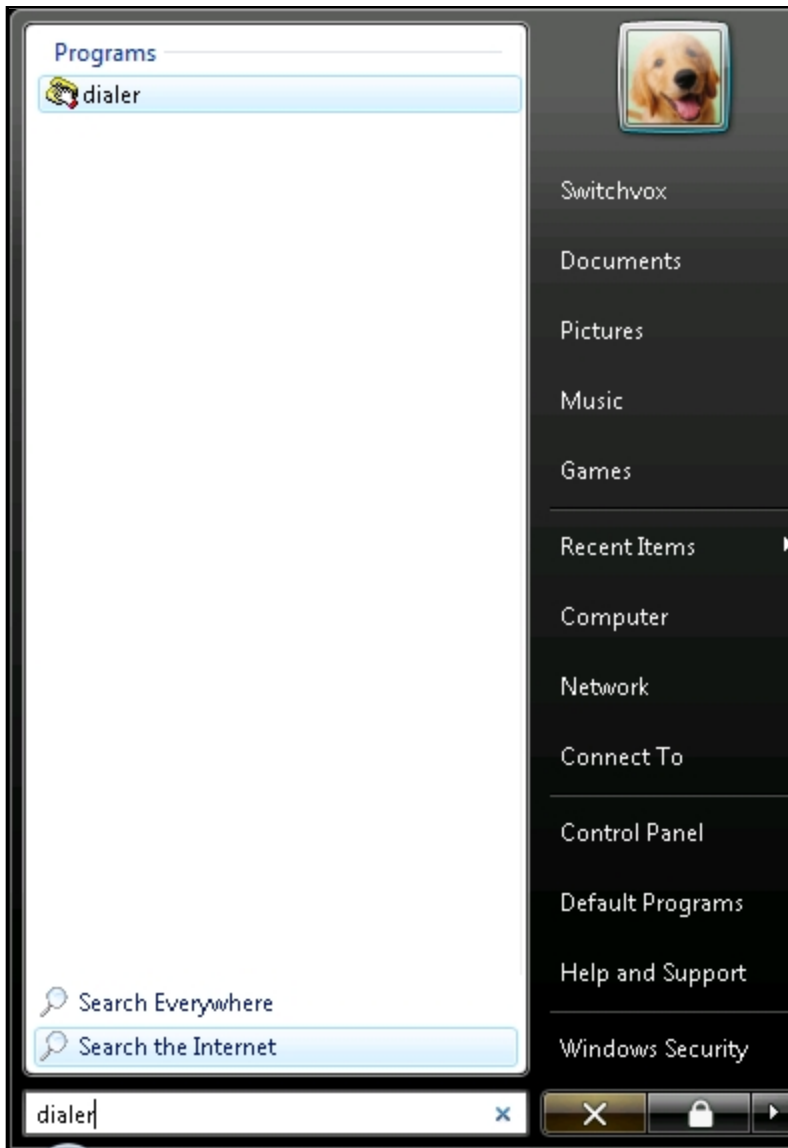


You can now place calls to contacts in Outlook Express by going to your Address Book. Right click on a contact who has a stored phone number and select Action->Dial...

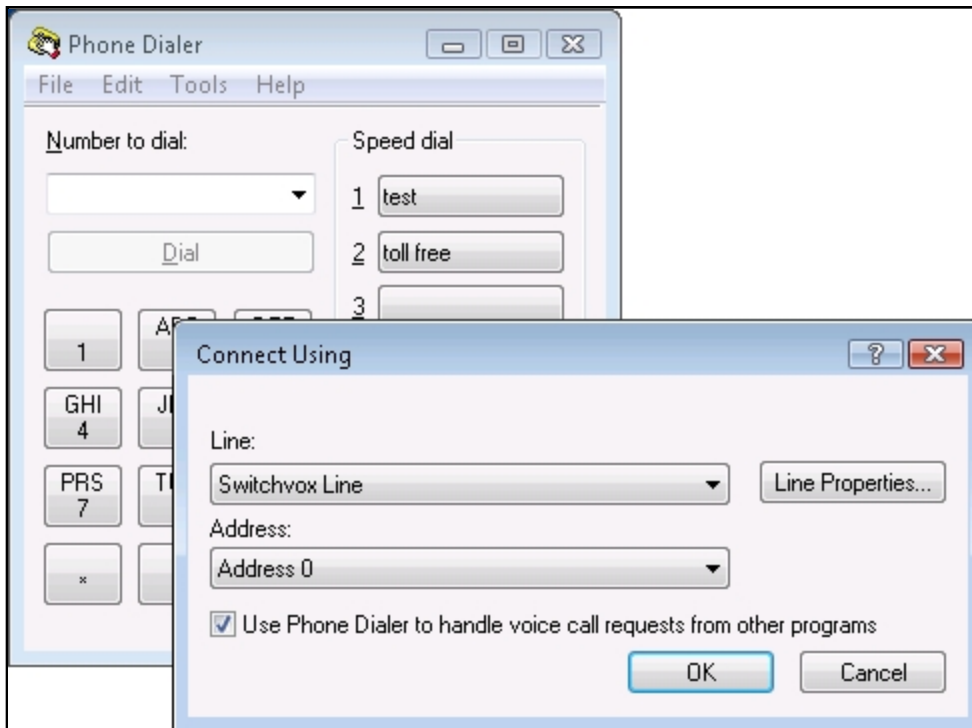
A New Call box should launch. Press Call... to initiate the call. Once your call is complete, click the Disconnect button on the Current Call window before starting another call.

Windows Contacts (Vista)

To place calls to phone numbers stored in Windows Contacts, you will need to set Vista's Dialer to use the Switchvox Line. To do this, click the Start Menu and enter "dialer" in the search field then press the Enter key to launch the dialer.



Once the dialer is launched, go to Tools -> Connect Using... Select Switchvox Line from the dropdown and click OK to submit the change. You can now close the dialer application.

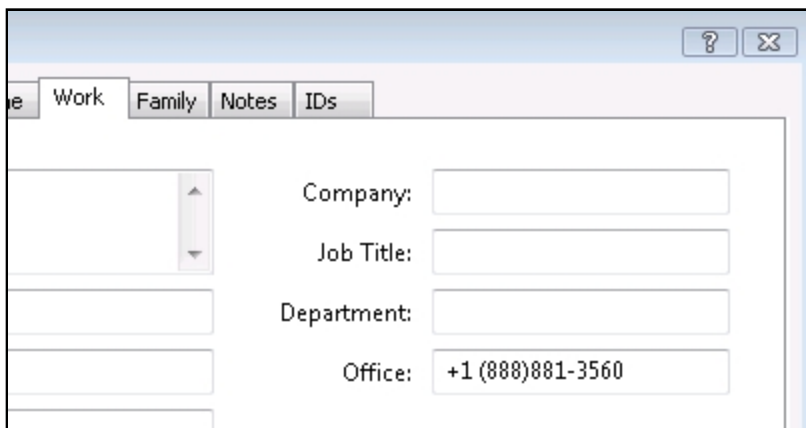


To place a call to one of your contacts, right click the contact and select Action->Call This Contact... A New Call window will be launched. Press Call to initiate the call. Once the call is complete, be sure to press the Hang Up button before initiating another new call.

Notes:

When adding contacts to Windows Contacts in Vista, phone numbers including an area code must be entered with a "+1(space)".

For example:



Changing TSP Settings

If you would like to change the phone extension used for TSP calls, perform the following steps:

1. Open the Start menu and select the Control Panel
2. Open Phone and Modem Options

3. Select the Advanced tab
4. Highlight SwitchvoxTSP and click Configure

To enable Smart Tags in Word 2003, Excel 2003, PowerPoint 2003

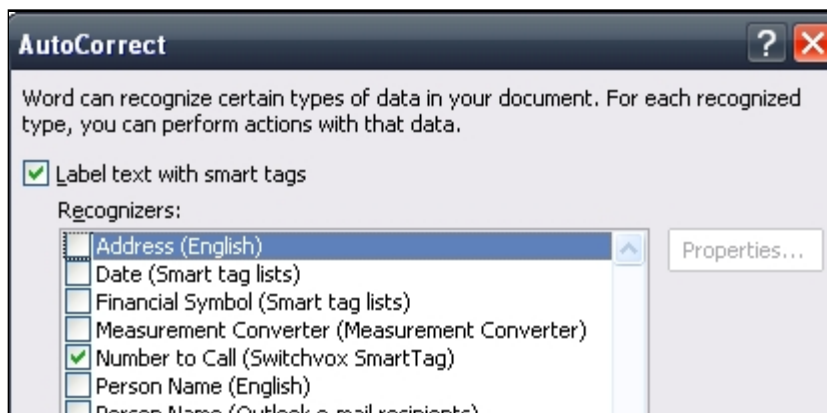
1. In Word, Excel, or PowerPoint, on the Tools menu, click AutoCorrect Options.
2. Click the Smart Tags tab.
3. Select the Label text/data with smart tags check box.
4. Make Sure "Number to Call (Switchvox Smart Tag)" is checked, and "Telephone Number (Smart Tag Lists)" is unchecked.

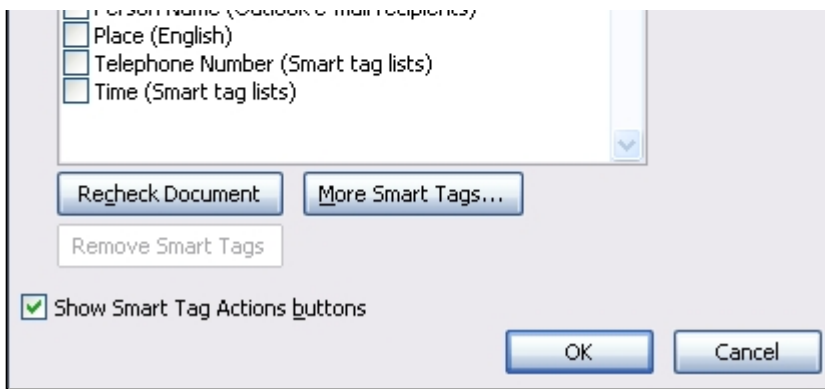
To enable Smart Tags in Word 2007, Excel 2007, PowerPoint 2007

1. In Word, Excel, or PowerPoint, click the Microsoft Office Button Office 2007 Button in the top left corner.
2. Click the ApplicationName (Word, Excel, PowerPoint) Options button.
3. In the categories pane, click Add-ins.
4. In the Manage box, click Smart Tags, and then click Go.
5. Select the Label text/data with smart tags check box.
6. Make Sure "Number to Call (Switchvox Smart Tag)" is checked, and "Telephone Number (Smart Tag Lists)" is unchecked.

To enable Smart Tags in Outlook 2007

1. Go to Tools and select Options
2. Select the Spelling tab and select Spelling and AutoCorrection...
3. Click the AutoCorrect Options button and select the Smart Tags tab
4. Select the Label text/data with smart tags check box.
5. Make Sure "Number to Call (Switchvox Smart Tag)" is checked, and "Telephone Number (Smart Tag Lists)" is unchecked.





Calling with Smart Tags

1. Potential phone numbers will be underlined with purple dots.
2. Hover over the number and an "i" with a circle around it will appear.
3. Click the "i" to view the smart tag options.
4. Click "Call via PBX" to make the call.