

Switchvox Notifier Suite

Switchvox Notifier Suite integrates your Switchvox PBX with your Microsoft Office software programs (Outlook, Word, PowerPoint, and Excel).



> Getting Started

The Getting Started section includes the system requirements, and instructions for installing and setting up Switchvox Notifier Suite and your Switchvox email account.

> The Notifier

On your desktop: make calls, see incoming calls, check call histories, add a caller to your contacts, and more!

> The Message Center

In Outlook: Listen to your voicemail, read your faxes, and quickly see and use Outlook activities that are related to your caller (email messages, tasks, and meetings).

> Smart Tags

In Outlook, Word, PowerPoint, and Excel: click on a phone number, and your phone rings!

> Under the Hood

A few details about how Switchvox Notifier Suite functions.

Switchvox Notifier Suite is designed for Microsoft Office 2007. Some of the features are not available if you are using another version of the Microsoft Office software programs.

Getting Started

This section includes the system requirements, and instructions for installing and setting up Switchvox Notifier Suite and your Switchvox email account.

System Requirements

Switchvox Notifier Suite requires an account on a Switchvox SMB running version 4.0 or later, and requires the following of your desktop computer:

- Microsoft Windows XP, Windows Vista, or Windows 7
- 32-bit processor
- Microsoft .NET Framework 3.5 *
- Microsoft Office 2007 Primary Interop Assemblies *
- Microsoft Visual Studio Tools for the Microsoft Office system (version 3.0 Runtime) *
- For the Switchvox Notifier Suite's Outlook-related features, Outlook 2007 is required

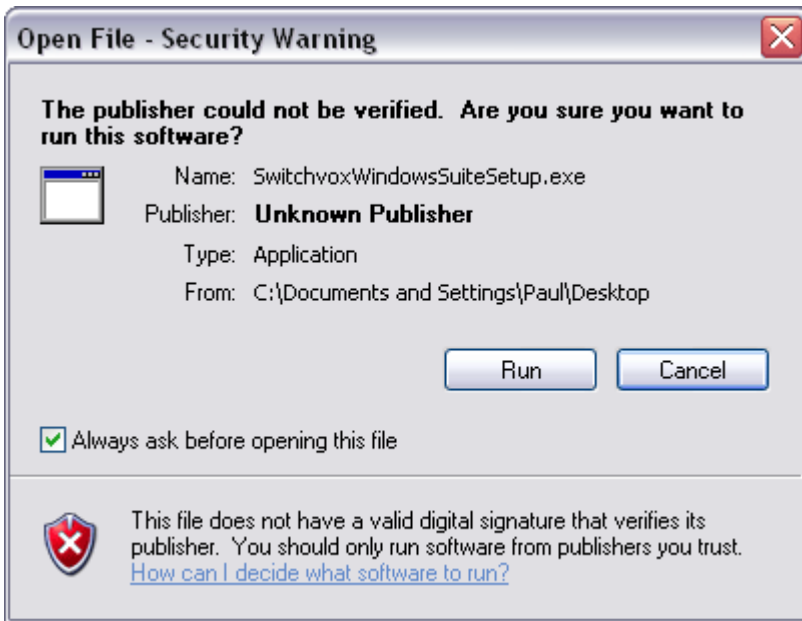
Note: If you have a 64-bit processor, you may be able to install Switchvox Notifier Suite to use some of the features, but you cannot make calls using **Smart Tags** or **Call Contact**.

* Automatically installed with Switchvox Notifier Suite, if necessary.

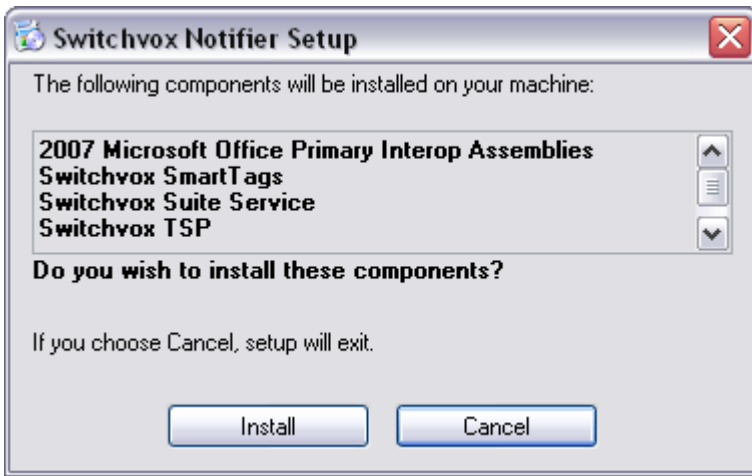
Installation Instructions

This section explains how to install Switchvox Notifier Suite.

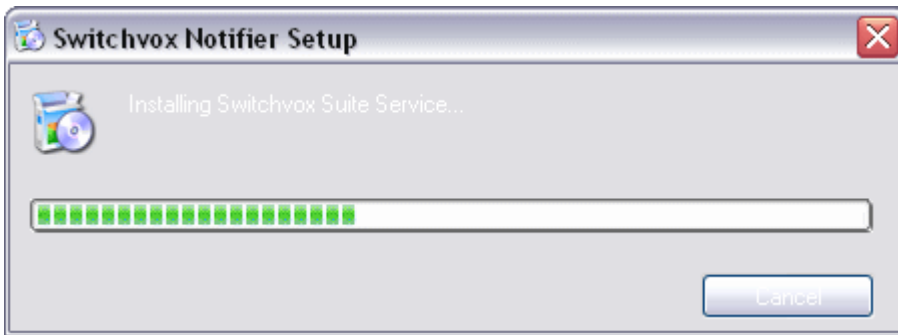
1. Download the installer to a location that is easy to find (e.g., your desktop).
2. Double-click the installer to begin the installation process.



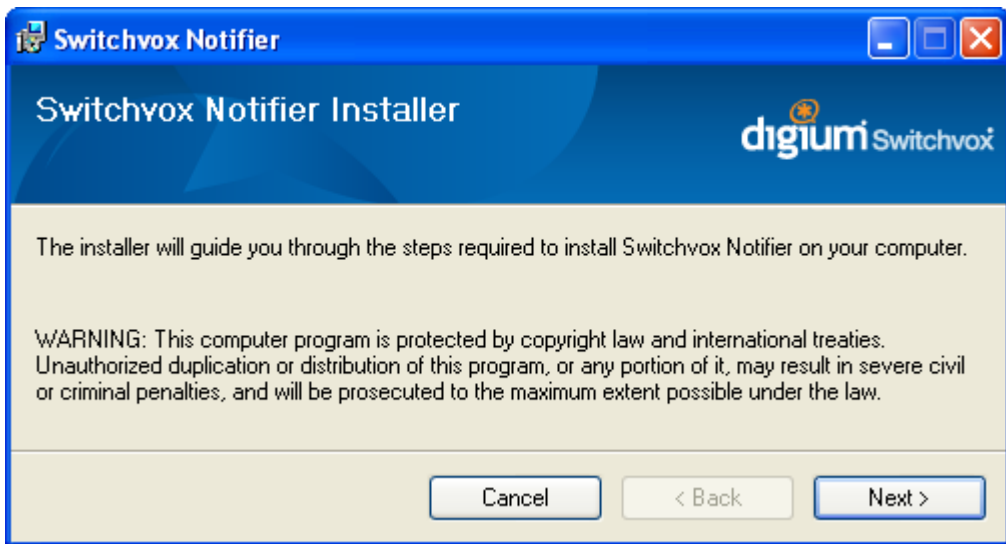
3. Click Run to continue.



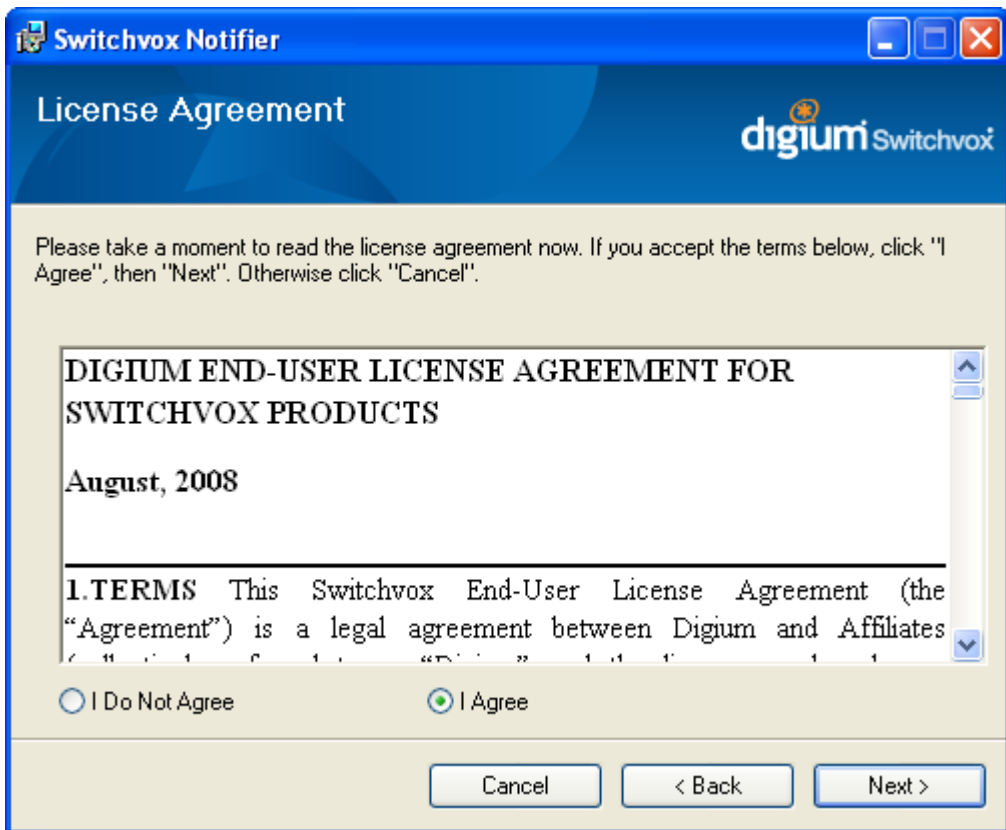
4. Click Install to continue.



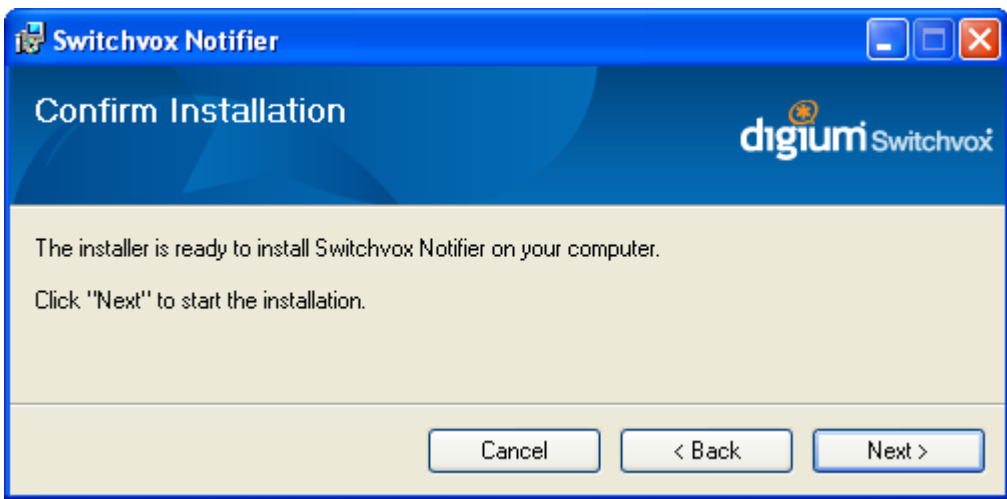
5. Click Run to continue.



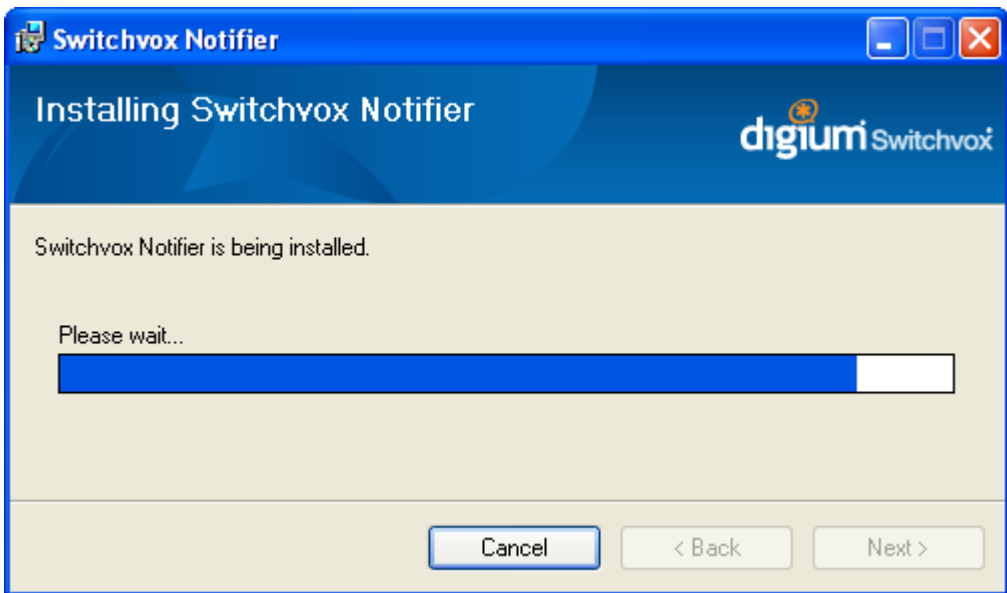
6. Click Next > to continue.

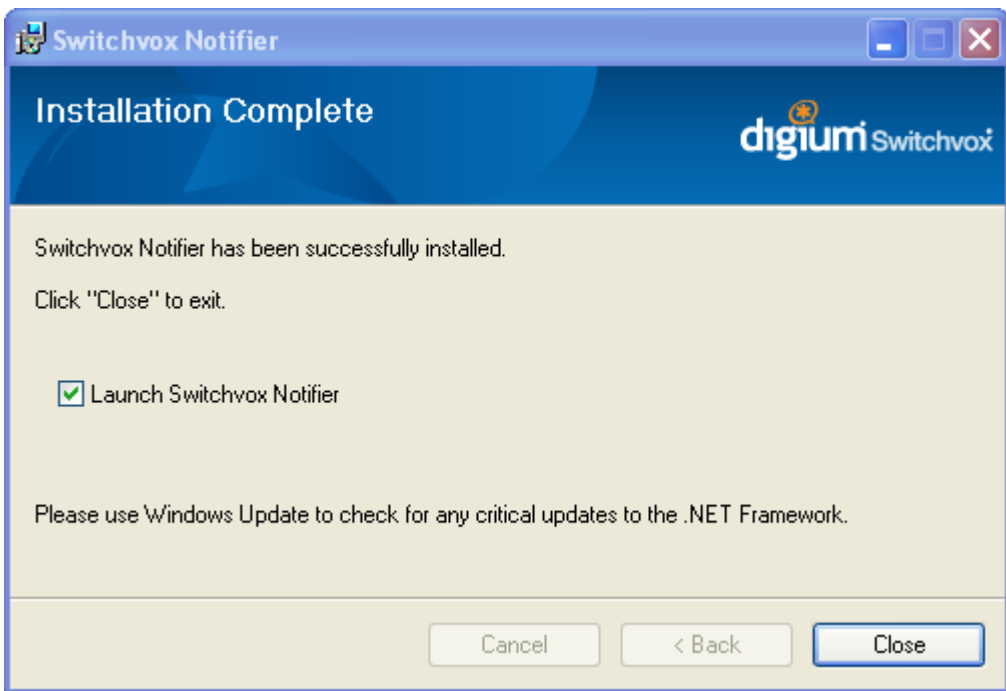


7. Check the I agree button, and then click Next > to continue.



8. Click Next > to start the installation.





9. Installation was successful! Click Close to exit.

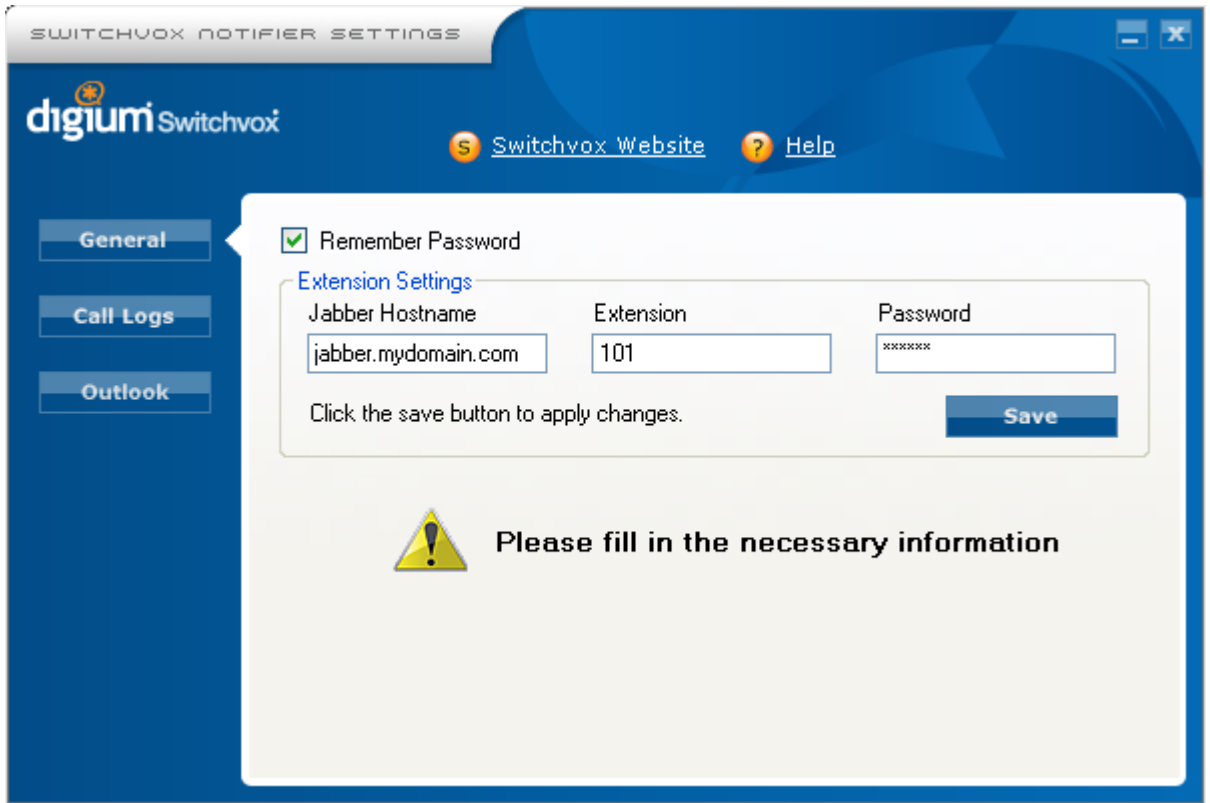
If you leave the box checked, the Notifier will launch. (If you need to launch the Notifier by hand, you can find it in your Start menu.)

10. If you want to use Switchvox Notifier Suite's Outlook-related features, you must also have the latest version of Microsoft Office. See [Updating Microsoft Office Programs](#) for details.

Now that you have completed the installation, please launch Switchvox Notifier (if it isn't already open) to display the **Settings** panel and set up Switchvox Notifier for use with your Switchvox PBX. (See [Setting up Notifier](#).)

Setting up Notifier

When you launch Switchvox Notifier for the first time (or when there is no Switchvox PBX to connect to), the Settings panel is displayed. This panel lets you configure Switchvox Notifier for use with your Switchvox PBX.



In the Settings panel, enter the Jabber Hostname of your Switchvox PBX, your Switchvox extension number, and your Switchvox password. (Please ask your Switchvox administrator for this information, if you do not already have it.)

Click Save, and Switchvox Notifier connects to your Switchvox PBX and returns a message of success.

IMPORTANT: If you do not see the success message, double-check that your hostname, extension number, and password are all correct. The Jabber Hostname of your Switchvox PBX could be different than the hostname that you normally use to access the Switchvox User Suite in a Web browser.

Once you have connected to your Switchvox PBX, you can use the Switchvox Notifier. See [The Notifier](#) section for more information.

You can also use the Settings panel to see your Switchvox call logs, and set up Notifier's Microsoft Outlook functionality. See the sections below for more information.

Notifier General Settings

The General settings let you set the domain of your Switchvox PBX, your extension number, and your password. Click Save to save your changes and log into your Switchvox PBX.

| Change Extension Settings

Check this box to make the Extension Settings active so that you can make changes. To keep from accidentally changing your extension settings, uncheck this box.

| Remember Password

Check this box if you want Switchvox Notifier Suite to remember your password indefinitely.

| Jabber Hostname

Enter the Jabber Hostname of your Switchvox PBX (please ask your Switchvox administrator for this information).

| Extension

Enter your Switchvox extension.

| Password

Enter your Switchvox password. This is the same password that you use to log into the Switchvox User Tool Suite and to pick up your voicemail.

| Automatically check for updates on startup

Check this box if you want Switchvox Notifier Suite to automatically check for and apply updates. If there is an update available for Switchvox Notifier Suite, it is downloaded and installed for you. If you uncheck this box, you will not automatically receive updates to Switchvox Notifier Suite, but you can click Update at any time to check for, download, and install updates.

SWITCHVOX NOTIFIER SETTINGS

digium Switchvox

[Switchvox Website](#) [Help](#)

General

Call Logs

Outlook

Change Extension Settings Remember Password

Extension Settings

Jabber Hostname	Extension	Password
<input type="text" value="jabber.mydomain.com"/>	<input type="text" value="101"/>	<input type="password" value="*****"/>

Click the save button to apply changes. **Save**

Application Updates - Choose Automatic or Update Manually

Automatically check for updates on startup **Update**

Notifier Call Logs Settings

The Call Logs settings let you set the number of days worth of call logs to display in the Notifier. Also, within this panel you can see the call logs for any date range you select.

| Number of previous days to log.

Select the number of days worth of logs to display in the Notifier.

| From Date To Date

Select the start and end dates for the call logs that you want to see, and click Show Logs. You can mouse-over each field to see its data (in case it doesn't fit onscreen).



Notifier Outlook Settings

The Outlook settings let you configure the Outlook activities in the Notifier. If you are not using Outlook as your default email client, we recommend that you turn off Outlook for Switchvox Notifier Suite.

| Enable Outlook Tab on Notifier

Check this box to enable Outlook activities in the Notifier. If you uncheck this box, the Actions menu will not include any Outlook activities, and the Outlook tab will not be available.

| Show Emails

Check this box if you want to see that you have unread email messages from the Outlook contacts associated with your caller's phone number.

| Show Tasks

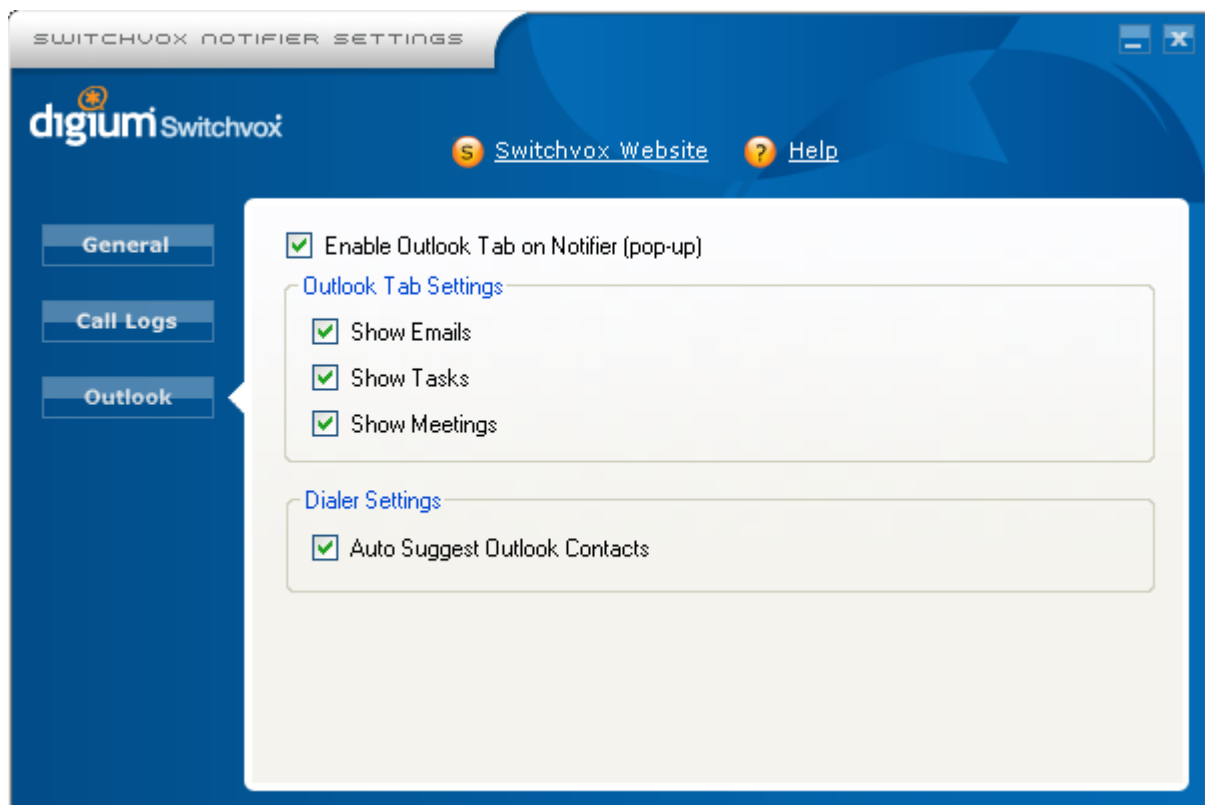
Check this box if you want to see open Tasks for the Outlook contact associated with your caller's phone number.

| Show Meetings

Check this box if you want to see upcoming meetings for the Outlook contact associated with your caller's phone number.

| Auto Suggest Outlook Contacts

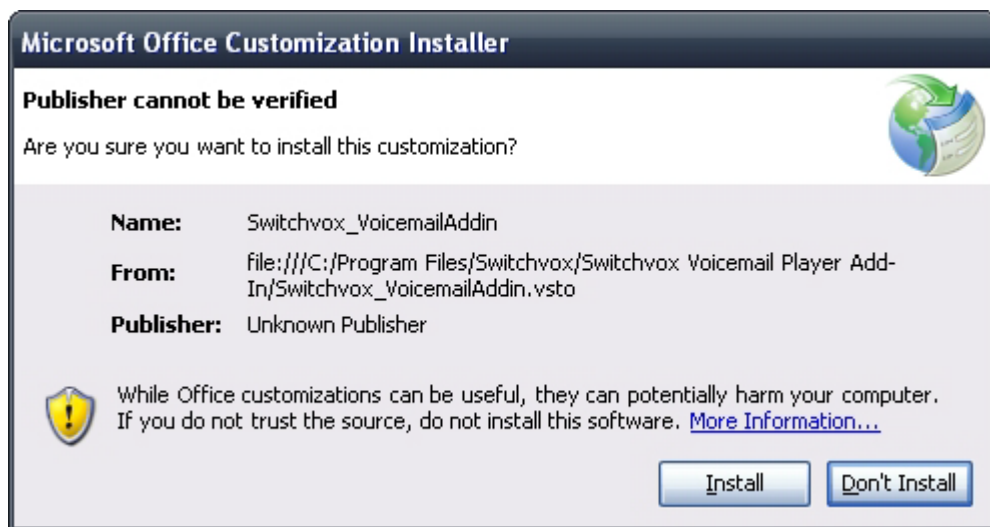
Check this box if you want Notifier to auto-suggest phone numbers from your Outlook contacts when you are using The Dialer. You can dial a phone number, or the first few letters of the contact's 'Full Name.'



Setting up your Switchvox Mailbox in Outlook

Switchvox Notifier Suite includes an Outlook Add-in that integrates your Switchvox Mailbox with Outlook.

The first time you open Outlook after installing Switchvox Notifier Suite, the following dialog box is displayed:



Click Install to continue.

To set up your Switchvox Mailbox in Outlook:

1. Open Microsoft Outlook, and select Tools > Account Settings.
2. Click New to create a new e-mail account.
3. Select IMAP, and click Next.

4. Check the box for Manually configure server settings or additional server types.
5. Click Next.
6. Select Internet E-mail.
7. Click Next.

User Information

Your Name:

E-mail Address:

Server Information

Account Type: ▼

Incoming mail server:

Outgoing mail server (SMTP):

Logon Information

User Name:

Password:

Remember password

Require logon using Secure Password Authentication (SPA)

8. In the User Information section, enter your name and your email address. Your email address is your extension number, the @ sign, then your Switchvox IP address or domain name. For example: 101@192.168.0.100, or 101@pbx.mydomain.com.
9. In the Server Information section, select the Account Type IMAP and enter your Switchvox server's name or IP. Your incoming and outgoing mail servers are the IP address or domain name of your Switchvox. This is the same IP or name that you use for the Switchvox User Suite.
10. In the Logon Information section, enter your user name and password. Your user name is your extension number, and your password is the same password that you use to log into the Switchvox User Suite and to collect your voicemail.
11. Check the box Remember password if you don't want to have to enter your password each time you access your email.
12. Click Next.

For more information, see [The Message Center](#).

If you have removed and then installed Switchvox Notifier Suite, you will have an error message when you launch Outlook. If you are getting this error, you will not be able to use the Message Center Add-in. To correct this, you must clear the ClickOnce cache of application manifests before reinstalling by executing the following:

```
C:\Program Files\Microsoft.NET\SDK\v2.0\Bin\Mage.exe -cc
```

For information about Mage.exe, please see

[http://msdn.microsoft.com/en-us/library/ac33y3te\(VS.80\).aspx](http://msdn.microsoft.com/en-us/library/ac33y3te(VS.80).aspx).

| Subscribing to Folders

When you have your Switchvox Mailbox set up in Outlook, you can use Outlook to manage the same folders that are in your Switchvox Mailbox (Voicemail / Fax > Mailbox in your Switchvox User Tool Suite). You can 'subscribe' to all of the folders, or just the ones you want to use in Outlook. If you 'unsubscribe' a folder, it still exists in your Switchvox Mailbox, it just isn't shown in Outlook. (You can always subscribe to it again later.) You can also create folders using Outlook, and those folders are accessible in your Mailbox.

To subscribe to your Switchvox folders in Outlook:

1. In your Mail Folders, select your Switchvox Inbox
2. Select Tools > IMAP Folders... or right-click on Inbox and select IMAP Folders...

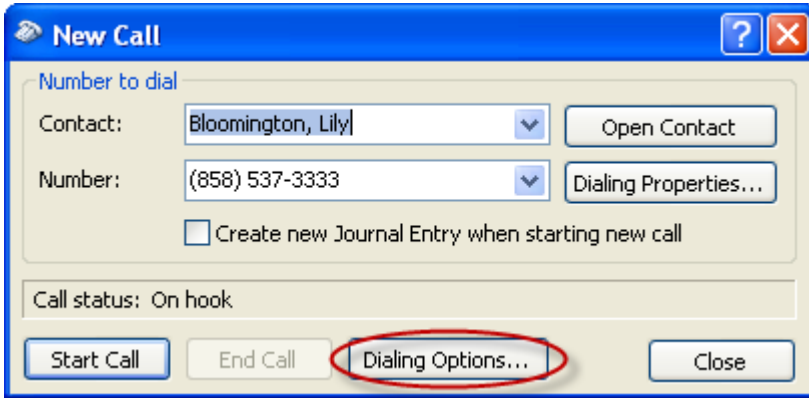
A list of folders is displayed, and you can subscribe to or unsubscribe from each folder. If you do not see a list of folders, click Query.

Now you are done setting up your Switchvox email account in Outlook. [The Message Center](#) section has more information about handling your Switchvox email in Outlook.

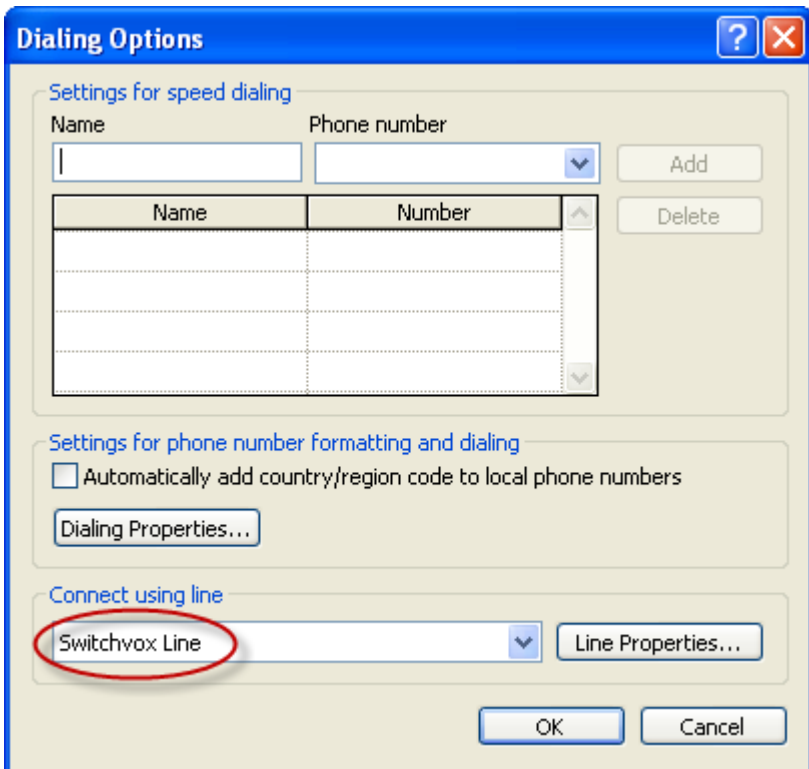
Setting up Dialing Options for 'Call Contact'

To make calls to your Outlook Contacts, you first need to set your Outlook Dialing Options. To do this:

1. Go to an Outlook contact that has a phone number, and right-click the contact.
2. Select Call Contact... from the menu.
The New Call dialog is displayed.



3. Click Dialing Options... (Not to be confused with Dialing Properties...)
The Dialing Options dialog is displayed.



4. Select Switchvox Line from the Connect using line dropdown.

5. Click OK.

Now when you click Start Call in the New Call dialog box, your Switchvox phone will ring! When you pick up the phone, the Contact's number will be dialed for you, just as if you dialed your phone.

IMPORTANT: If your calls are failing, go to Dialing Properties and be sure that your active Location's Dialing rules are compatible with Switchvox's Call API Settings for your extension. (Please ask your Switchvox administrator for help with this.) The most likely problem is that your active Location is prepending a 9, and your Call API settings are also prepending a 9. Try removing any prepended digits for your Location, that might fix the problem.

The Notifier

This section describes the features of the Notifier, which is available via an icon in your computer's taskbar.



When you receive an incoming call, or successfully connect an outgoing call, the Switchvox Notifier Call Panel is displayed in the bottom right corner of your computer, just above the taskbar. Switchvox Notifier gives you several tools:

- The Dialer lets you make a call from your desktop.
- When a call comes in, the Call Panel opens and displays the caller ID and your call history with that phone number.
- The Call Panel integrates with Outlook so that you can see any Outlook activities associated with your caller, or you can create a contact, a task, a meeting, or an email message for your caller.

To set up Switchvox Notifier Suite and your Switchvox Outlook account, see [Getting Started](#).

Making a Phone Call With the Dialer

To make a phone call with the Dialer:

1. Click on the Notifier icon to display the Dialer input box.

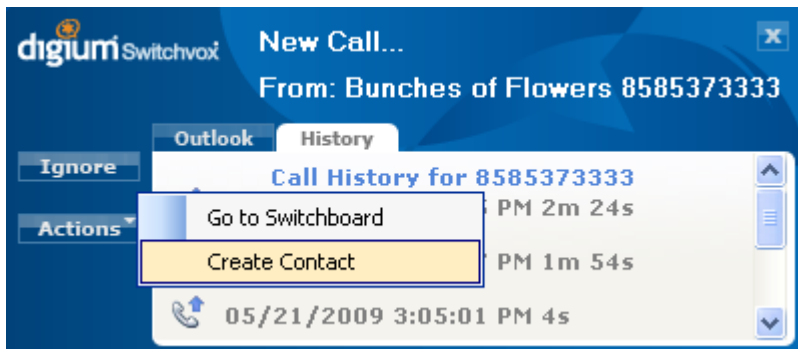


2. Type in the phone number that you want to call.
This can be an extension in Switchvox, or an external phone number.
If you have Outlook 2007 installed and you have enabled auto-suggest in your Notifier Outlook Settings, you can enter the first few numbers or letters of a contact, and the dialer will offer you a selection of phone numbers.
3. Press the Enter key, or click Dial.
Switchvox calls your phone, then when you pick up, it calls the phone number. When the call connects, the Notifier Call Panel opens in the bottom right portion of your computer monitor.

To close the dialer, click the Notifier icon again.

Receiving a Phone Call

When you receive a phone call, the Notifier Call Panel opens in the bottom right portion of your computer monitor.



Using the Call Panel

When you get a phone call, or you are on an active call, the Call Panel offers you tools to handle the call.

| Ignore

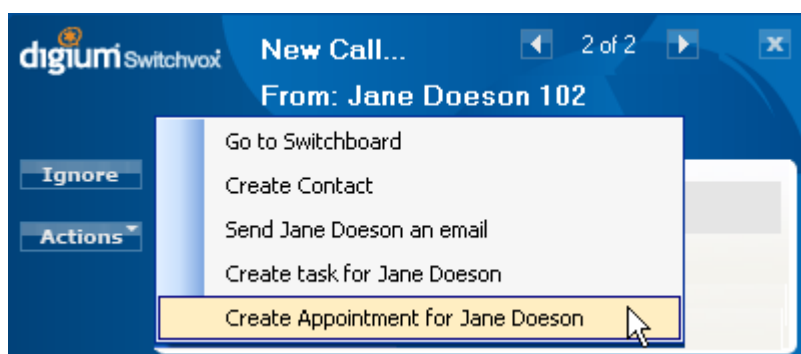
Press this button to send the caller to your call rules (by default, your call rules transfer the caller to your voicemail). This works for an incoming call that you haven't answered yet, or for an active call.

| Actions

Press this button for options to launch the Switchboard, or to create a contact, a task, a meeting, or an email message using the caller's information.

If you do not have Microsoft Office 2007 installed, or you have turned Outlook off in the Settings panel, the Outlook-based actions are not available.

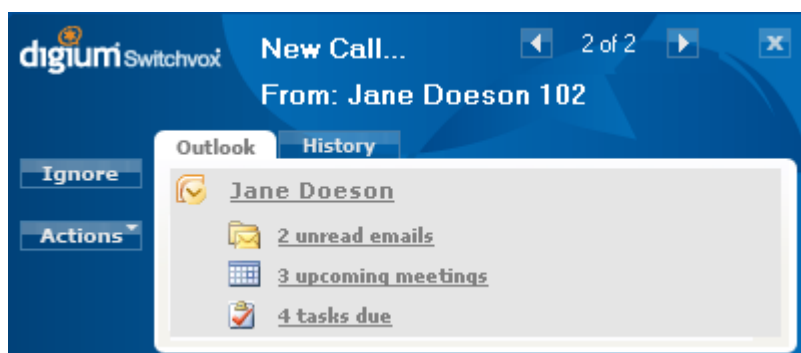
If the caller is not already in your Contacts, then you can only use Create Contact. Once a caller is in your Contacts, you can create another contact for the same phone number, or create a task, a meeting, or an email message for that caller.



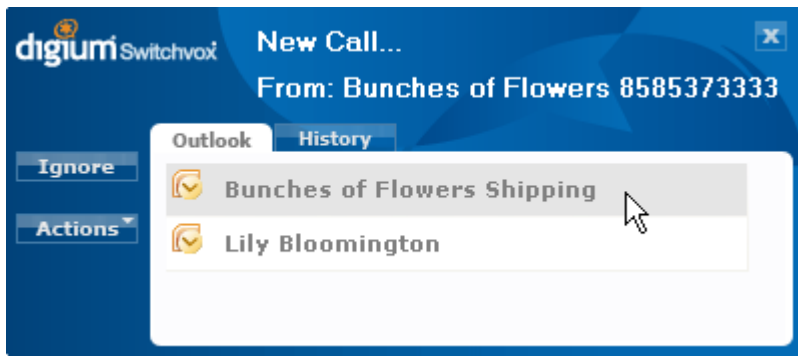
| Outlook Tab

The Outlook tab displays your Outlook contacts for this phone number, and lets you know about unread emails, upcoming meetings, and open tasks with those contacts.

If you do not have Microsoft Office 2007 installed, or you have turned Outlook off in the Settings panel, the Outlook tab is not displayed.



If you have multiple Outlook contacts for one phone number, all of those contacts are displayed.







| History Tab

The History tab displays your call history with the caller. The icons next to each call signify the direction of the call; incoming or outgoing.



Using the Notifier Menu

When you right-click on the Notifier icon, the Notifier Menu is displayed with the following options:

-  Show Calls
Displays the Notifier Call Panel. This can only be used if you are on a call (incoming or outgoing), and it has no affect if the Call Panel is already displayed.
-  Switchboard
Open your Switchboard in a Notifier window.
-  Settings/Logs
Open the Notifier Settings Panel to set up your Notifier options, and view call logs.
-  Exit
Exit the Notifier. This does not affect the Outlook Message Center, or Smart Tags.

The Message Center

This section describes the features of Switchvox Notifier Suite's Message Center, which you access in the Microsoft Outlook program.

The Message Center gives you several tools:

- A quick view of your Switchvox voicemail and fax notifications.
- A one-click option to play a voicemail message or view a fax. (Once you read a Switchvox notification email message, that voicemail or fax is marked as read throughout Switchvox.)
- An easy way to create Outlook activities associated with the people you talk to via Switchvox.
- Click-to-call functionality for Outlook contacts via the Call Contact option. See the [Setting up Dialing Options for 'Call Contact'](#) section for details on setting up Call Contact for use with Switchvox. This feature is not available for users with 64-bit processors.
- Click-to-call functionality for phone numbers within email messages (via [Smart Tags](#)).

To set up Switchvox Notifier Suite and your Switchvox Outlook account, see [Getting Started](#).

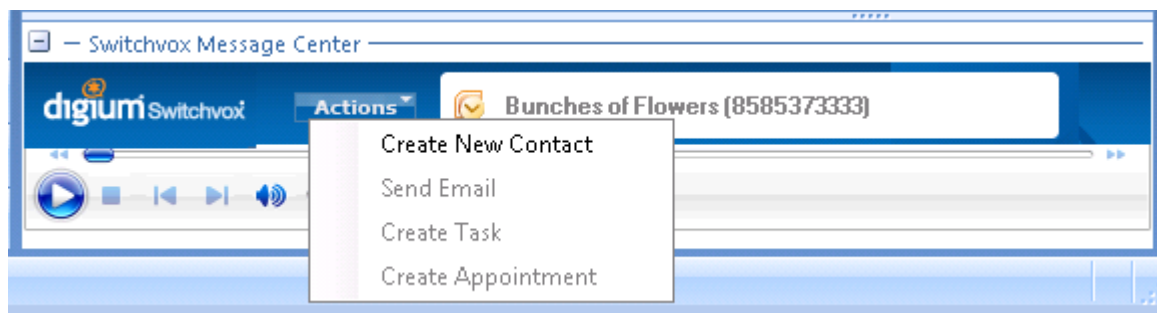
Once you have set up your Switchvox account in Outlook, go to your Outlook Mail folders and click on your new Switchvox account. The Message Center displays how many unread voicemail and fax notifications that you have. (The Message Center will not display this view until you have at least one email message in your Switchvox Inbox.)



Message Center	
Inbox	3
Fax	3

The Message Center Add-in

If you open an email message from Switchvox, you can listen to an attached voicemail message and use the Switchvox Message Center Add-in. (If you do not see this Add-in feature, you may need to restart Outlook.)



The Actions button lets you create new Outlook activities related to the caller.

If the caller is not already in your Contacts, then you can only use Create Contact. Once a caller is in your Contacts, you can create another contact for the same phone number, or create a task, a meeting, or an email message for that caller.

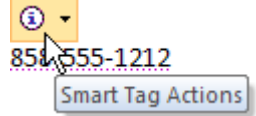
Smart Tags

This section describes how to use Switchvox Notifier Suite with smart tags, which are available in the Microsoft Office programs (Outlook, Word, PowerPoint, and Excel).

Smart tags give you a set of actions you can use based on the type of data that has been tagged. In our case, the Switchvox smart tag offers an action for tagged phone numbers; call the number via your Switchvox PBX!

To set up Switchvox Notifier Suite and your Switchvox Outlook account, see [Getting Started](#).

To make a call using a smart tag, click on the smart tag actions button above the phone number. Using the smart tag actions menu, select Call via PBX. Switchvox rings your extension, then when you pick up, it rings the phone number for you just as if you had dialed your phone.



Enabling Switchvox Smart Tags

If your Microsoft Office program is not tagging phone numbers, then you need to enable the Switchvox smart tag for that program. You might need to do this for each program.

In Microsoft Office 2007 Word, PowerPoint, or Excel:

1. Select Microsoft Office Button > Program Options (where Program is the name of the program you are in, such as Word Options)
2. Click Add-Ins
3. From the Manage dropdown, select Smart Tags
4. Click Go...
5. Check the box Label text [data] with smart tags
6. Check the box Number to Call (Switchvox Smart Tag)
7. Check the box Telephone Number (Smart tag lists) if that box is available
8. Click OK

In Microsoft Office Outlook 2007:

1. Select Tools > Options...
2. Select the Spelling tab
3. Click Spelling and AutoCorrection...
4. Click AutoCorrect Options...
5. Select the Smart Tags tab
6. Check the box Label text with smart tags
7. Check the box Number to Call (Switchvox Smart Tag)
8. Check the box Telephone Number (Smart tag lists) if that box is available
9. Click OK

Under the Hood

This section provides a few details about how Switchvox Notifier Suite functions.

| Switchvox Suite Service

The Switchvox Suite Service provides connectivity to your Switchvox PBX through the Switchvox Extend XML-based Application Programming Interface. The running process is named Switchvox Suite Service and can be started and stopped through the local services panel.

For more information about Switchvox Extend, see the [Switchvox Developer Central](#) website.

| Switchvox TAPI

The Switchvox Telephony Service Provider Application Programming Interface (TAPI) is a dynamic-link library (DLL) that supports communications-device control through a set of exported service functions. The Switchvox TAPI lets you dial phone numbers in local applications.

The Switchvox TAPI dials phone numbers through the Switchvox Suite Service.