

Integration with Outlook

Application Note on Using TAPI integration on the MX250

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1 Introduction

1.1 Purpose

This application note describes how the MX250 can be integrated with Microsoft Outlook using the TAPI interface. This document outlines the configuration of MXIE¹ and a screen pop application called Identapop Pro. Identapop Pro integrates with MS Outlook for contact pop-ups and journal entries. Hold, retrieve, and transfer are not directly supported by Outlook. When a call is originated in Outlook and you would like to use hold, retrieve or transfer, use MXIE instead.

1.2 System Requirements

- **Operating system:** Windows 2000 service pack 4 or Windows XP Professional service pack 1a.
- Microsoft Outlook version 10 or higher
- **MXIE:** This is the PC client software for the MX250 and MX1200 systems.
- **Identapop Pro:** This software generates screenpops on Outlook for incoming calls.

2 Installing MX TAPI link on the PC

Prior to managing calls through the TAPI interface, you need to add the **MX Telephony Service Provider** to the PC that will run the TAPI-enabled application.

1. Ensure MXIE software is installed on your computer. Ensure that you restart your PC every time you upgrade the MXIE software on your PC. Refer to the MXIE User's Manual to install the MXIE software.
2. Open the **Phone and Modem Option** from Windows' Control Panel and click the **Advanced** tab. The **Phone and Modem Options** is shown as in figure 1.
3. Click the **Add** button. The **MX Telephony Service Provider** will be a choice of available Telephony Providers, as shown in figure 2.
4. Select **MX Telephony Service Provider** and click the **Add** button. The **MX Telephony Service Provider** will now be added to the system, as shown in figure 3.
5. Exit from the **Phone and Modem Options** and **Control Panel** windows by clicking on the **OK** buttons.

1. MXIE is the acronym for the MX250's client application that runs on Windows 2000 and Windows XP. Details about MXIE's functions can be found at <http://www.zultys.com/mxie.htm>.

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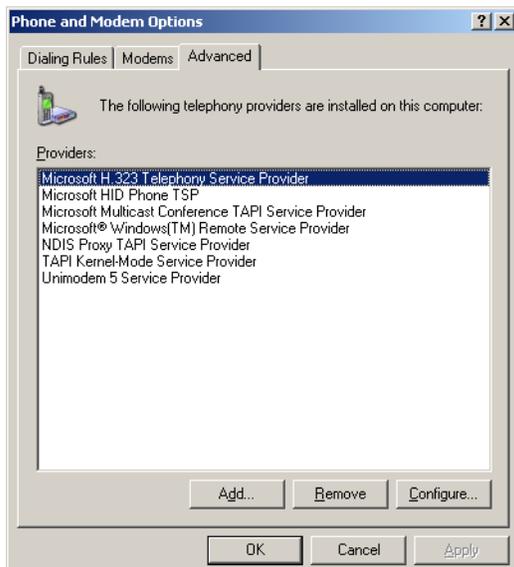


Figure 1 Phone and Modem Options - Advanced Tab

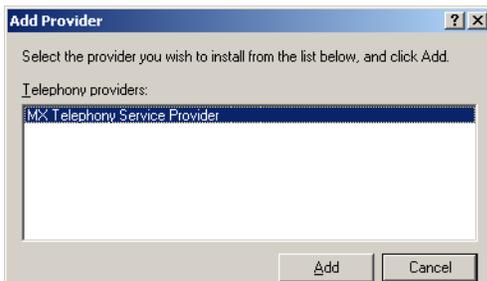


Figure 2 Select "MX Telephony Service Provider" to complete TAPI configuration

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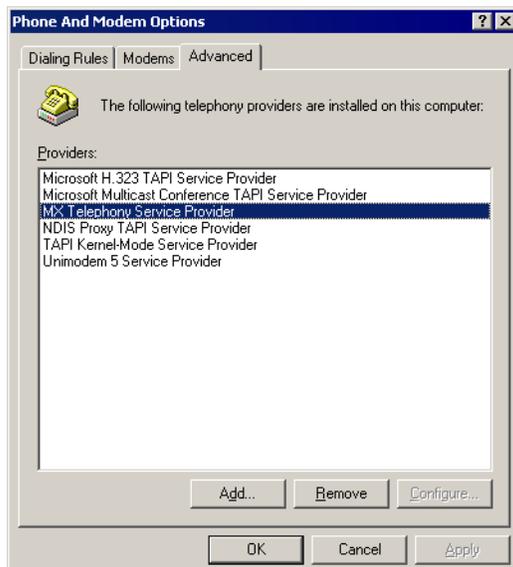


Figure 3 MX Telephony Service Provider Added to Windows

3 Configuring Outlook to Make Calls through TAPI

After you install the Zultys TAPI link onto your PC, configure Outlook to use the Zultys MX TAPI link to make calls from your contact list in Outlook. You need to configure this only once on Outlook, and all subsequent calls made from an Outlook contact will default to the Zultys MX TAPI link. To configure the Zultys MX TAPI on Outlook:

1. Right click on a contact and choose the "Call Contact..." menu item as shown in figure 4.
2. The **New Call** window will open as shown in figure 5.
3. Click the "Dialling Options..." button to open the **Dialling Options** window shown in figure 6.
4. Select **Zultys MX Line** from the **Connect using line** field. The Zultys MX Line does not require any additional configuration.
5. Click the **OK** button.

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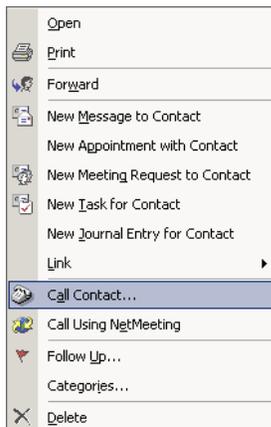


Figure 4 Outlook – Call Contact



Figure 5 Outlook – New Call

4 Making an Outbound Call from Outlook

4.1 Ways to Initiate an Outbound Call

There are three ways to initiate a call from within Outlook:

- from the main menu by selecting **Actions | Call Contact** as described in figure 7
- right click a contact and select the **Call Contact** menu item as shown in figure 8
- pressing the **Dial** button in the tool bar, shown in figure 9

4.2 Indication of Status within Outlook

Outlook displays call status for various call status. The list of call status is described below:

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Figure 6 Outlook – Dialing Options window

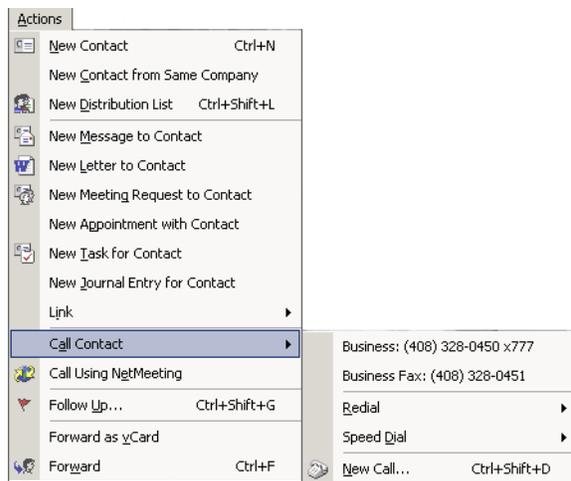


Figure 7 Making a call using the menu system on Outlook

- On hook: TAPI line is in the IDLE state. No calls are being initiated or terminated
- Dialing: A call is being dialed, or in the DIALING state
- Connected: A TAPI line is actively connected
- Hanging Up: A TAPI call is being torn down and resources are being released

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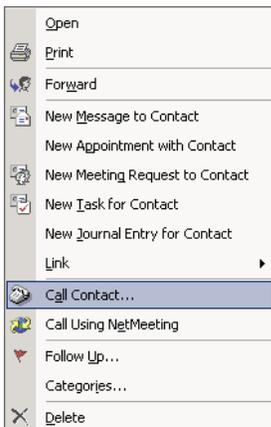


Figure 8 Making a call by right clicking a contact with Outlook

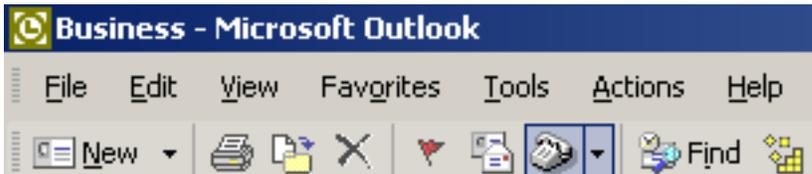


Figure 9 Making a call using the dial button on Outlook

To make an outbound call from Outlook:

1. Ensure MXIE is logged into MX and bound to a device. If MXIE is not logged into the MX an error message as shown in figure 10 will appear when you try to initiate



Figure 10 Outlook - Line Properties Error Message

2. Verify that DND or call forwarding is not enabled on the bound device.

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3. Initiate a call by any of the three methods. The **New Call** window will appear as shown in figure 5. The call status is **On Hook**.
4. Press the **Start call** button to dial the phone number.
5. The SIP device that is bound to MXIE will alert you to go off hook. Go off hook on the your bound device and the MX250 will initiate the call. The call status will change to **Connected** and the device plays the ringback, while the call is being established. The **Connected** state is set since there is a connection between TAPI and the MX. This **Connected** state does not indicate a connection with the calling party.
6. When you are done with the call, terminate the call by doing either of these actions:
 - place the SIP device on hook
 - press the **End Call** button on Outlook.

If the SIP device is placed on hook, the call status will immediately change to **On hook**. If the **End Call** button is pressed, the call status will transition to the **Hanging up** state then to the **On hook** call status.

4.3 Caveats with International Calls

For international calls Outlook has a problem if the number is in the following format:

+61 (0)2 8818 3266

This example assumes you are calling a number in Australia from the US.

When dialling from a US location, Outlook will send the (0) as part of the number string. The (0) should not be sent when dialling from the US. The (0) should be sent only when dialling from Australia. To ensure that the proper number is dialled from all locations, omit the (0) from the Outlook entry shown below:

To place a TAPI call using Outlook:

+61 2 8818 3266

From a US location, Outlook will dial:

011 61 2 8818 3266

When calling from the (02) area code from within Australia, Outlook will dial:

8818 3266

When calling from the (04) area code from within Australia, Outlook will dial:

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150 2 8818 3266

5 Third Party Screenpop Software: IdentaPop Pro

5.1 Purposes

The following sections describes the features of IdentaPop Pro. Below are examples of how to use IdentaPop Pro with Outlook and MXIE:

- Receiving incoming calls with Outlook
- Journalling incoming calls with Outlook
- Journalling outgoing calls with Outlook

5.2 Features

- Fully integrated with Microsoft Outlook contacts for name lookups and screen pop-ups
- Choice of caller ID display, a screen popup of your caller's Outlook contact, or a journal popup of your caller's Outlook contact
- Suited for the remote, business or home user
- New contact popup available for a caller that is not in your Outlook contact list
- Works with public folders in Outlook such as the journal folder
- Monitoring software sits in your system tray

5.3 Installing

1. Install a copy of *IdentaPop Pro* on your PC. You can download a trial version of IdentaPop Pro at <http://www.identafone.com>. To download a trial version:
 - Go to **IdentaPop Pro Screen Pops with Outlook Contacts** and click "Download Trial."
 - Download "IdentaPop Pro" by saving the zip file to your local drive.
 - After download is complete, unzip the executable file and follow the on screen instructions. Start the IdentaPop Pro application by double clicking the desktop icon. A splash page appears for about 8 seconds as shown in figure 4.
2. Run **IdentaPop Pro**, which will open the application as shown in figure 11..

If you have **IdentaPop Pro** minimized, you should see its icon in the system tray. To run **IdentaPop Pro** from the minimized state, double click the icon from the system tray, as shown in figure 12,

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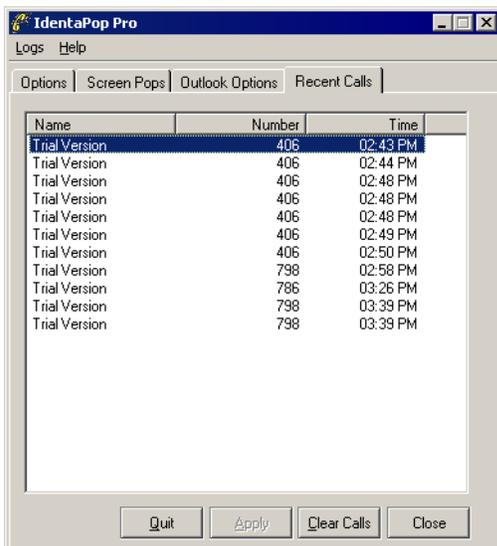


Figure 11 IdentaPop Pro window when maximized from system tray

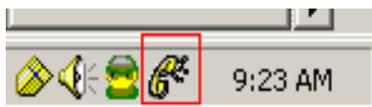


Figure 12 IdentaPop Pro icon in the system tray

5.4 Configuring for use with Outlook

1. Run IdentaPop Pro.
2. View the **Options** tab as shown in figure 13:
 - a. Select *Zultys MX Line* for the **Telephony Settings**.
 - b. *Monitor Line* must be selected in order for the caller ID popup to appear on your monitor
3. Click on the **Screen Pops** tab shown in figure 14. This provides display options with Outlook journals and contacts when receiving an incoming call along with the calling party's caller ID.

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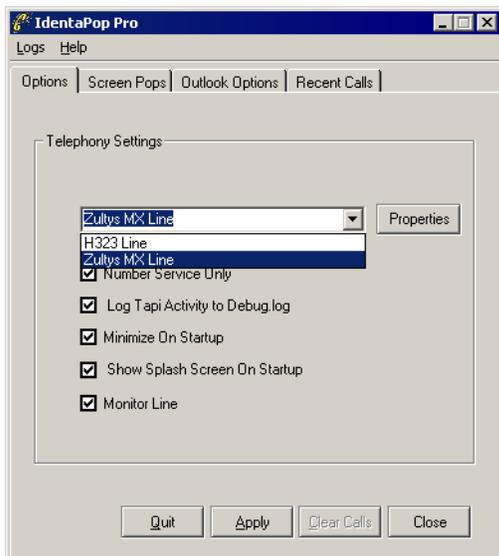


Figure 13 Zultys MX Line is selected for the Telephony Settings

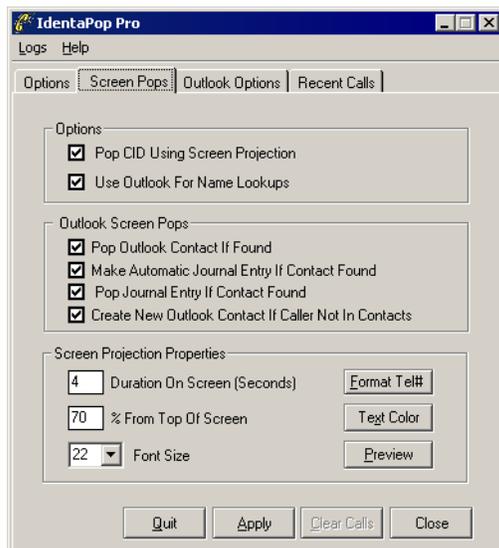


Figure 14 Screen Pops tab

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- a. The *Options* section enables or disables the incoming caller ID pop-up, and lets the user choose whether or not to use Outlook for contact name lookups. In order to see the incoming caller ID pop-up, enable "Pop CID Using Screen Projection." An example of an incoming call pop-up with the calling party's name and caller ID is shown in figure 15.

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Figure 15 Example of a caller ID contact displayed on your monitor

- b. The *Outlook Screen Pops* section lets the user enable or disable Outlook contact and journal pop-ups for recognized and new incoming calls.
 - **Pop Outlook Contact If Found** – If this field is checked and a call comes in that exists in your Outlook contact list, Outlook displays the person's contact information. An example is shown in figure 16.

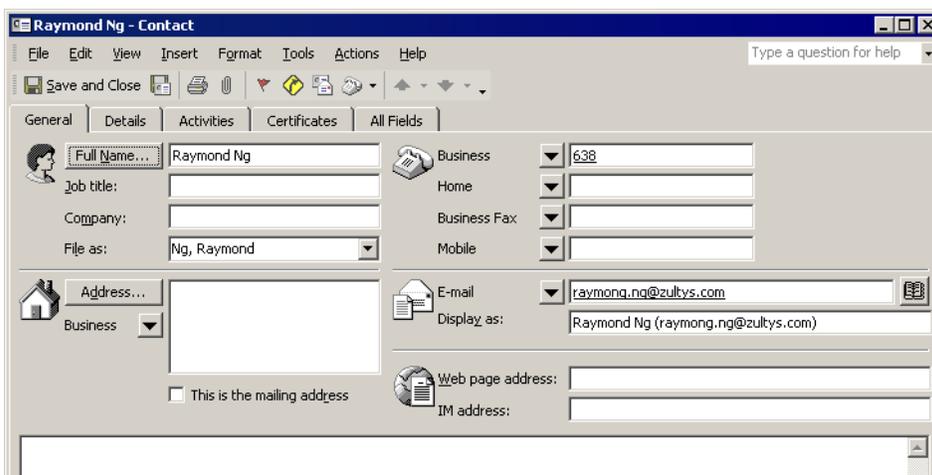


Figure 16 Example of a call contact in Outlook

- **Make Automatic Journal Entry If Contact Found** – If this field is checked and a call comes in that exists in your Outlook contact list, a journal entry for the contact will appear. An example is shown in figure 17.

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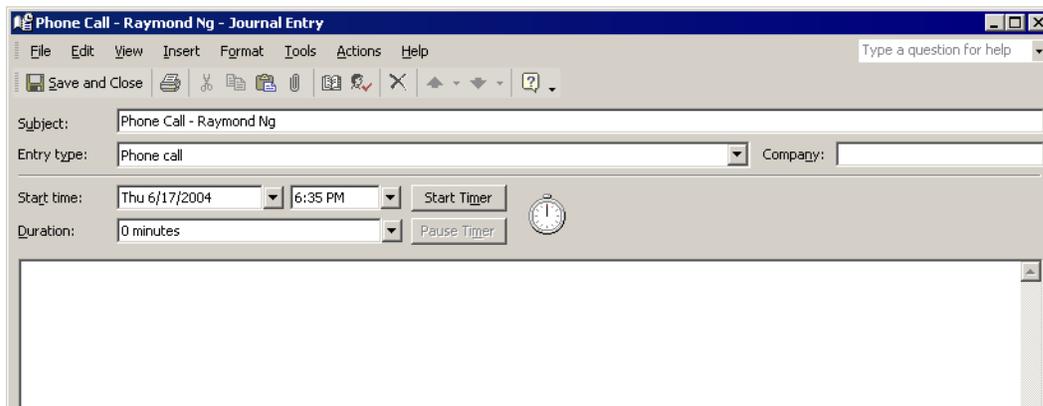


Figure 17 Example of a contact journal entry in Outlook

- **Pop Journal Entry If Contact Found** – If this field is checked and a call comes in that exists your Outlook contact list, a journal entry for the contact will appear. An example is shown in figure 17.
 - **Create New Outlook Contact If Caller Not In Contacts** – If this field is checked and a call comes in that is not in Outlook's list of contacts, a new untitled contact window will appear. An example is shown in figure 18.
- c. The *Screen Projection Properties* section lets you modify how the caller ID is to be displayed on your monitor.
- **Duration on Screen (Seconds)** – This field lets you specify how long the caller ID appears in your monitor. After the time expires, the number will disappear.
 - **% From Top of Screen** – This field lets you specify how much space the caller ID takes up on your monitor
 - **Font Size** – This field lets you specify the size of the font when the caller ID is displayed

The *Recent Calls* tab displays the time and number of the recent incoming calls to your extension. An example is shown in figure 19.

6 Receiving Calls and Using Journal on Outlook

1. The following applications must be running in order for Outlook to display caller ID pop-ups:

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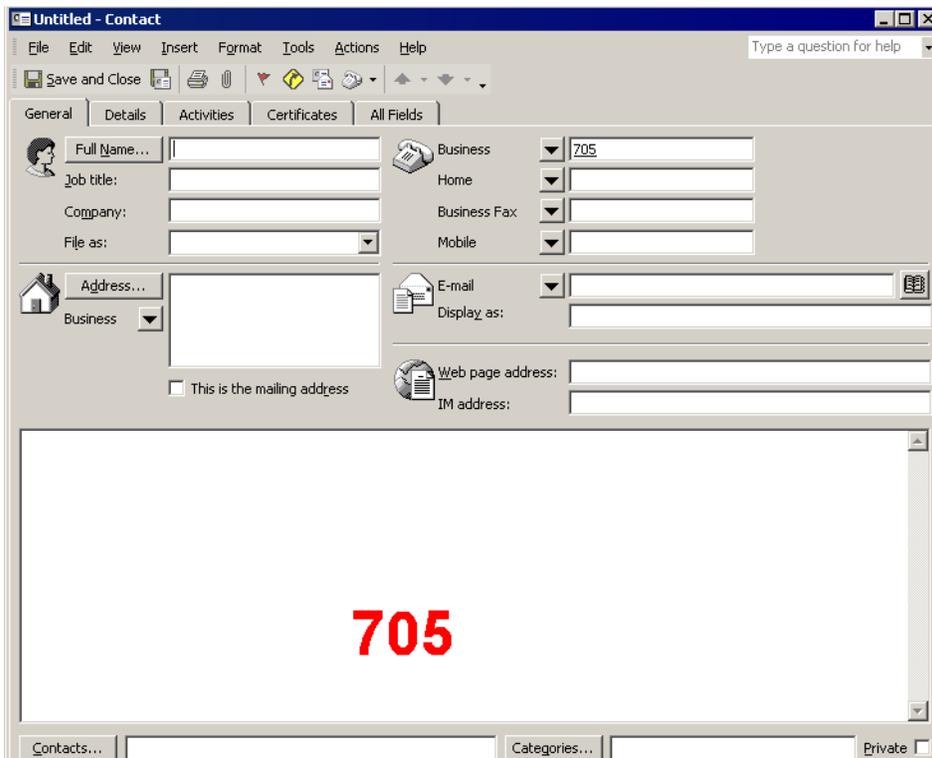


Figure 18 Incoming call that is not an Outlook contact

- MXIE
 - MS Outlook
 - IdentaPop Pro
2. When an entry from your Outlook contact list calls you, the caller ID, name of calling party, Outlook contact and Outlook journal entry appears. See figure 20.
 3. Answer the call. Hang up when you are finished with the call.

If a call comes in that is not in your Outlook contact list, the caller ID and a new Outlook contact entry appears. See figure 18.

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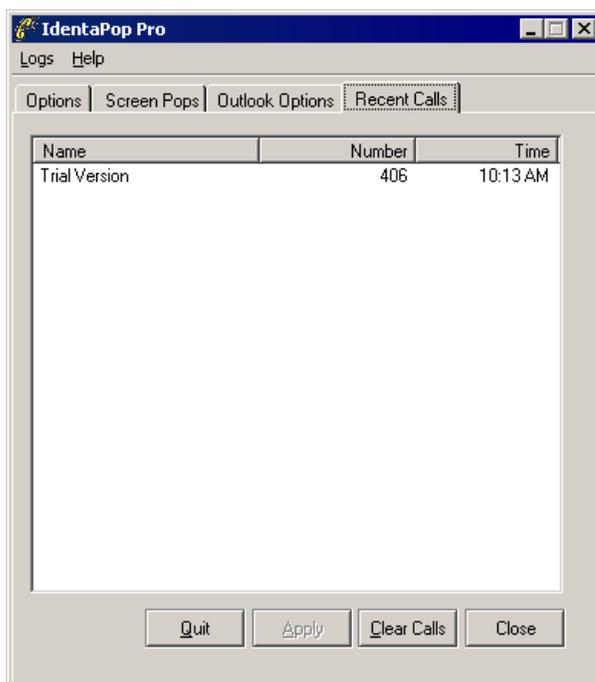


Figure 19 Recent Calls tab

6.1 Journalling incoming calls with Outlook using a timer

If an incoming call is from an existing contact in Outlook, the caller ID, name of calling party, Outlook contact and Outlook journal entry appears as shown in figure 20. During the call, click the “Start Timer” and enter information in the phone call journal entry as shown in figure 21.

6.2 Journalling outgoing calls from Outlook

1. Ensure IdentaPop Pro and MXIE are opened.
2. Ensure **Make Automatic Journal Entry if Contact Found** and **Pop Journal Entry if Contact Found** are checked in the **Screen Pops** tab.
3. Open Outlook, go to Contacts, and call the contact.
4. A New Call window appears. Ensure “Create new Journal Entry when starting new call” is selected as shown in figure 22.

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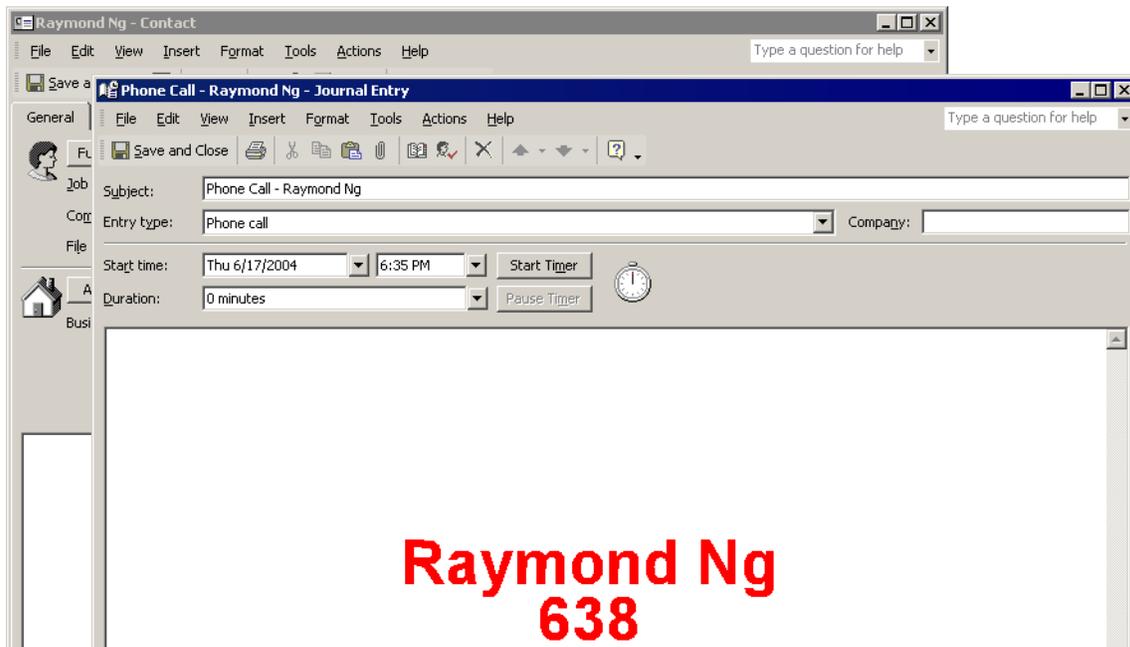


Figure 20 Incoming call from an existing contact in Outlook

5. Press the **Start Call** button.
6. Pick the up phone to make the outgoing call.
7. The journal entry appears in figure 23.
8. The called party answers the call.
9. Continue with journal entry until the call is finished.
10. Save and close the journal entry.
11. Click the Close button in the **New Call** window.

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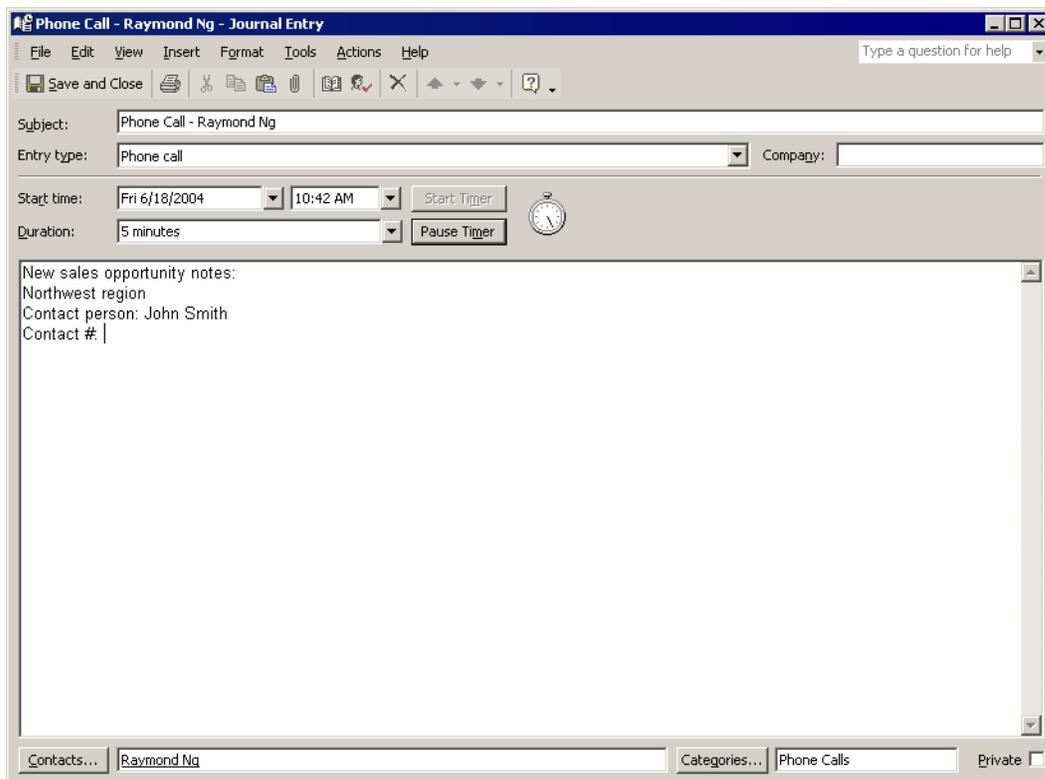


Figure 21 Journal entry of a call that uses a timer

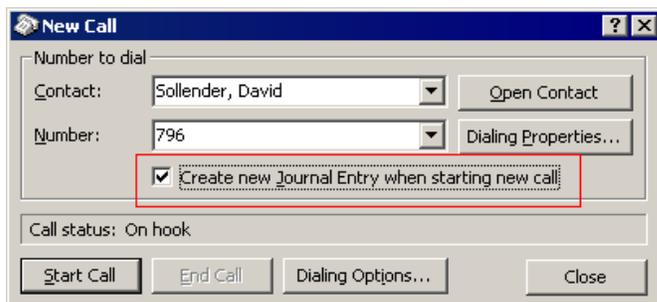


Figure 22 Enabling a Journal Entry when starting new call

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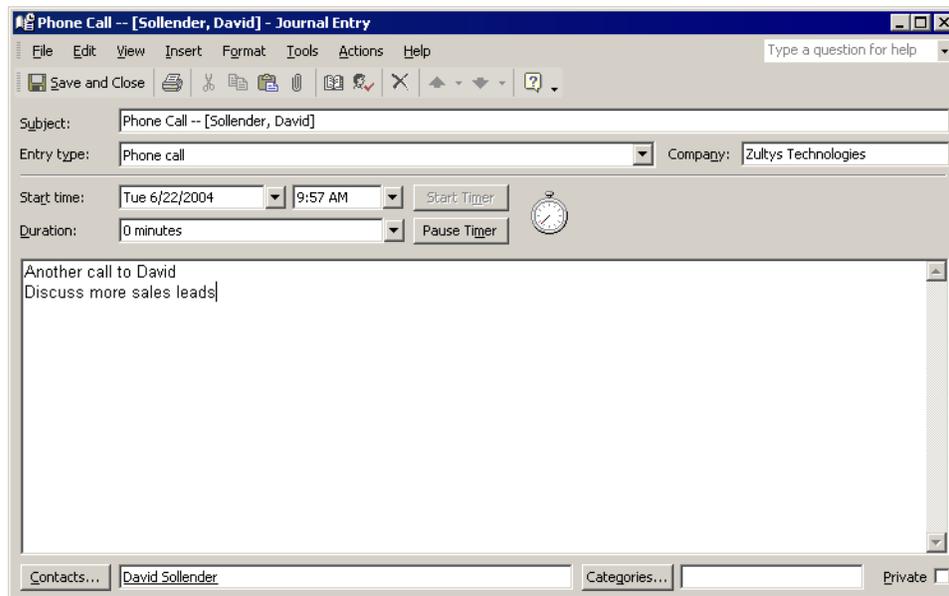


Figure 23 Popup of journal entry popup after call starts

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