

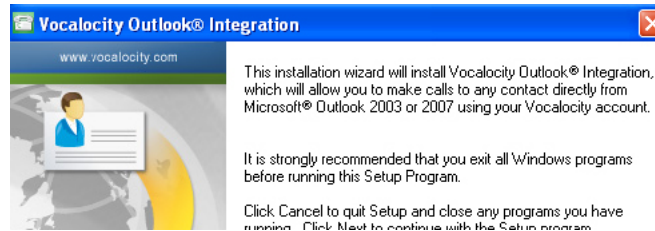
# Vocalocity User Guide | Outlook Integration

## **VOCALOCITY OUTLOOK INTEGRATION**

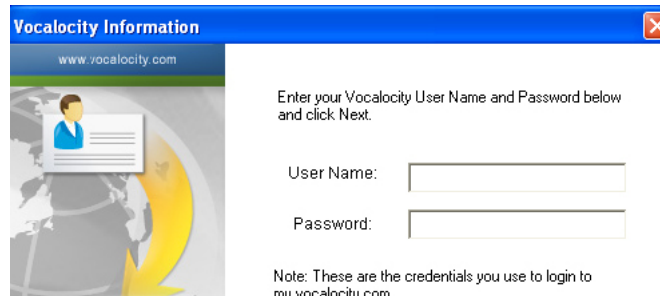
This is an administrator guide that will give step by step directions on how to use Vocalocity Outlook Integration. The account managers hold a training session daily for new customers to review how to use the system. Contact an account manager at 877.VOCALOCITY for details.

### DOWNLOAD VOCALOCITY OUTLOOK INTEGRATION

1. Visit [www.vocalocity.com/features/downloadoutlookintegration.cfm](http://www.vocalocity.com/features/downloadoutlookintegration.cfm) or <http://my.vocalocity.com>
2. Click the Download Outlook Integration link
3. Run the installation wizard for Outlook Integration



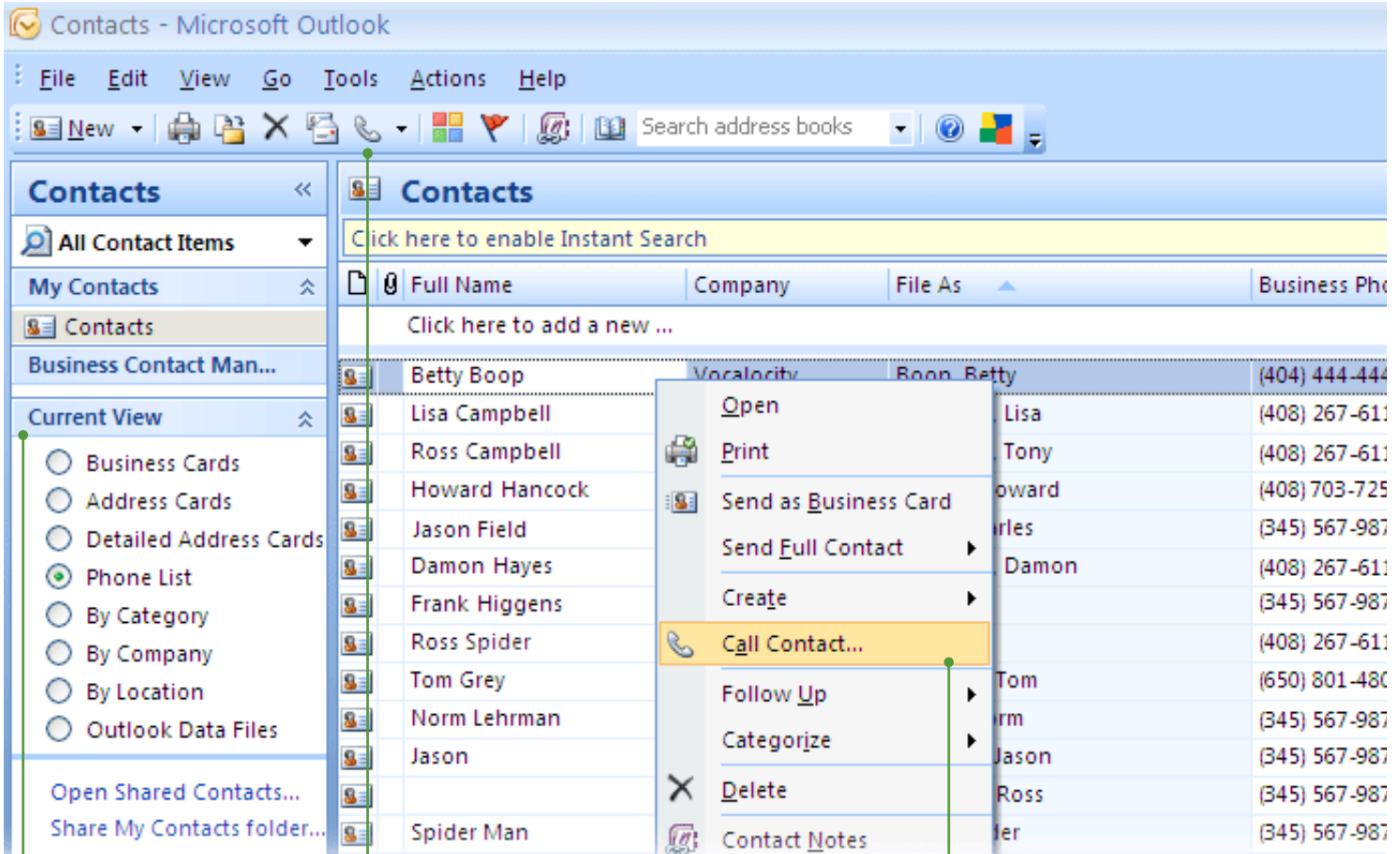
4. During the installation you will be prompted to enter your Vocalocity user name and password. This is the same password and user name you use to log in to the VocalocityPBX user interface. If you do not know your user name and password, please call 877.VOCALOCITY and speak with a Vocalocity Account Manager.



5. You will be prompted to make a test call to ensure the installation was successful. Click Test Call and a call will be placed to your extension. Once you answer you will hear a message confirming that the installation successfully installed.

## VOCALOCITY OUTLOOK INTEGRATION

The Vocalocity Outlook Integration feature allows users to integrate Outlook with Vocalocity. Users can initiate calls with a simple click of the mouse from their Outlook client.



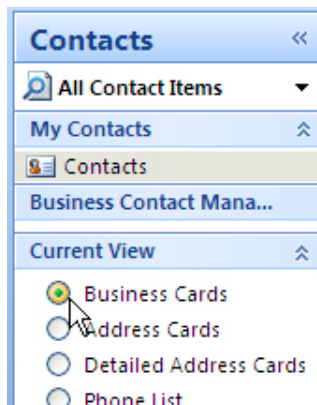
SELECT ANY VIEW TO USE CLICK TO CALL

USE THE PHONE ICON TO CLICK TO CALL ANY NUMBER

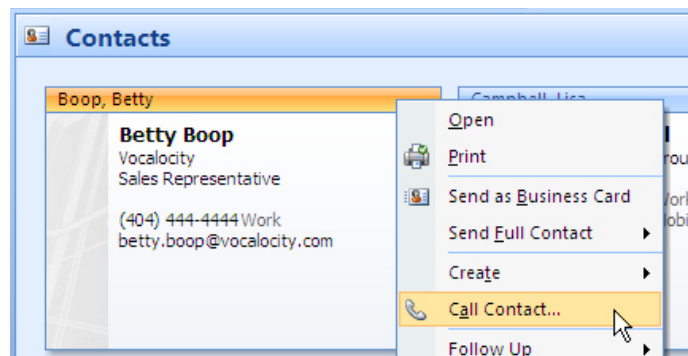
RIGHT CLICK ON A CONTACT TO CALL SELECTED CONTACT

## INITIATE CALL FROM OUTLOOK

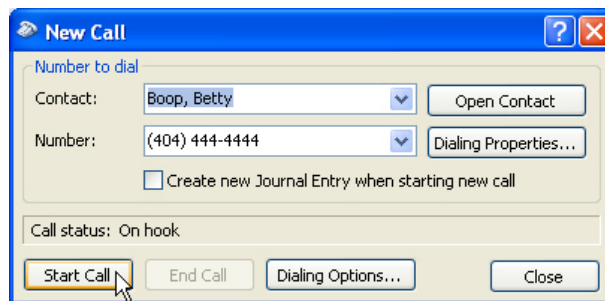
1. Select any view from Contacts in Outlook



2. Right click on the Contact and select Call Contact



3. Click Start Call in the New Call pop-up box



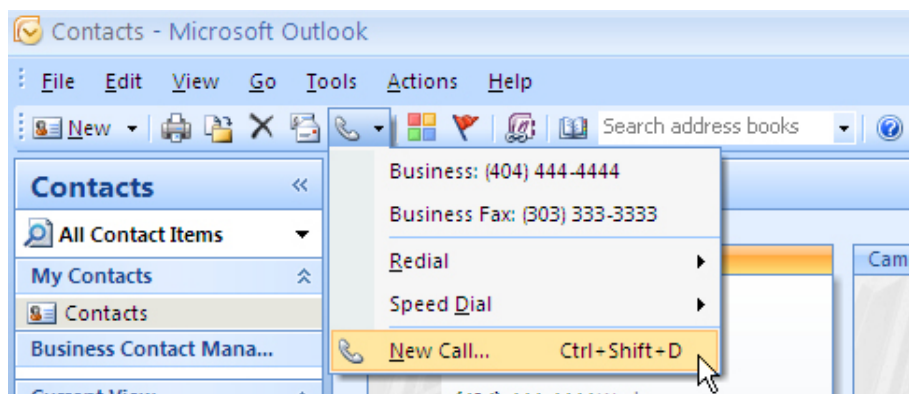
4. Your phone will ring, once you answer, your call will be connected to the selected contact

\* The same process can be followed for all Contact Views in Outlook

## USING THE CALL BUTTON

The Call button in Outlook allows you to make calls to existing contacts as well to numbers that are not in your contacts.

1. Click the Call button
2. If a contact is selected, the dropdown will populate with that contact's numbers. Clicking one of the numbers will initiate a call. Selecting New Call will allow you to place a call to any number.



3. Enter any number in the Number field of the New Call pop-up box and click Start Call
4. Your phone will ring, once you answer, your call will be connected to the selected contact