Toolbar Quick Start Guide

XO Hosted PBX

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Table of Contents

About this Document

This is the *Quick Start Guide* for the XO Hosted PBX Toolbar. It explains how to install, configure and sign in to the toolbar for XO Hosted PBX. It is intended for end users who want to use the toolbar feature to make and answer calls and manage their phone service.

What is the Toolbar?

The toolbar is a small application that lives in your web browser (for example, Internet Explorer) or your Microsoft Outlook email client. Using the toolbar, you can

- make and answer calls on your phone using your PC
- retrieve voicemail
- set features of your phone service
- access a global directory of all the lines in your enterprise.

Requirements

The toolbar is supported on Microsoft Windows XP and later only. You must have local Administrator privileges to install the toolbar. However, you do not require elevated privileges to use it. Of course, you also need any one of Microsoft Internet Explorer 6, Mozilla Firefox 13 or Outlook 2003 or later. Finally, you must have a PDF reader such as Adobe Acrobat Reader to access the documentation included with the toolbar.

Your site may already have one or more toolbars, add-ins and plugins installed for use with these programs. XO cannot guarantee compatibility between the toolbar and your environment.

Installing and Configuring the Toolbar

Download

The toolbar must be downloaded and installed before it can be used. To download the installation package, use a web browser to sign on to the MyPhone portal (link), and navigate to the section labeled *My Features*. Click on the entry marked *Outlook Toolbar*. The screen will look similar to Figure 1:
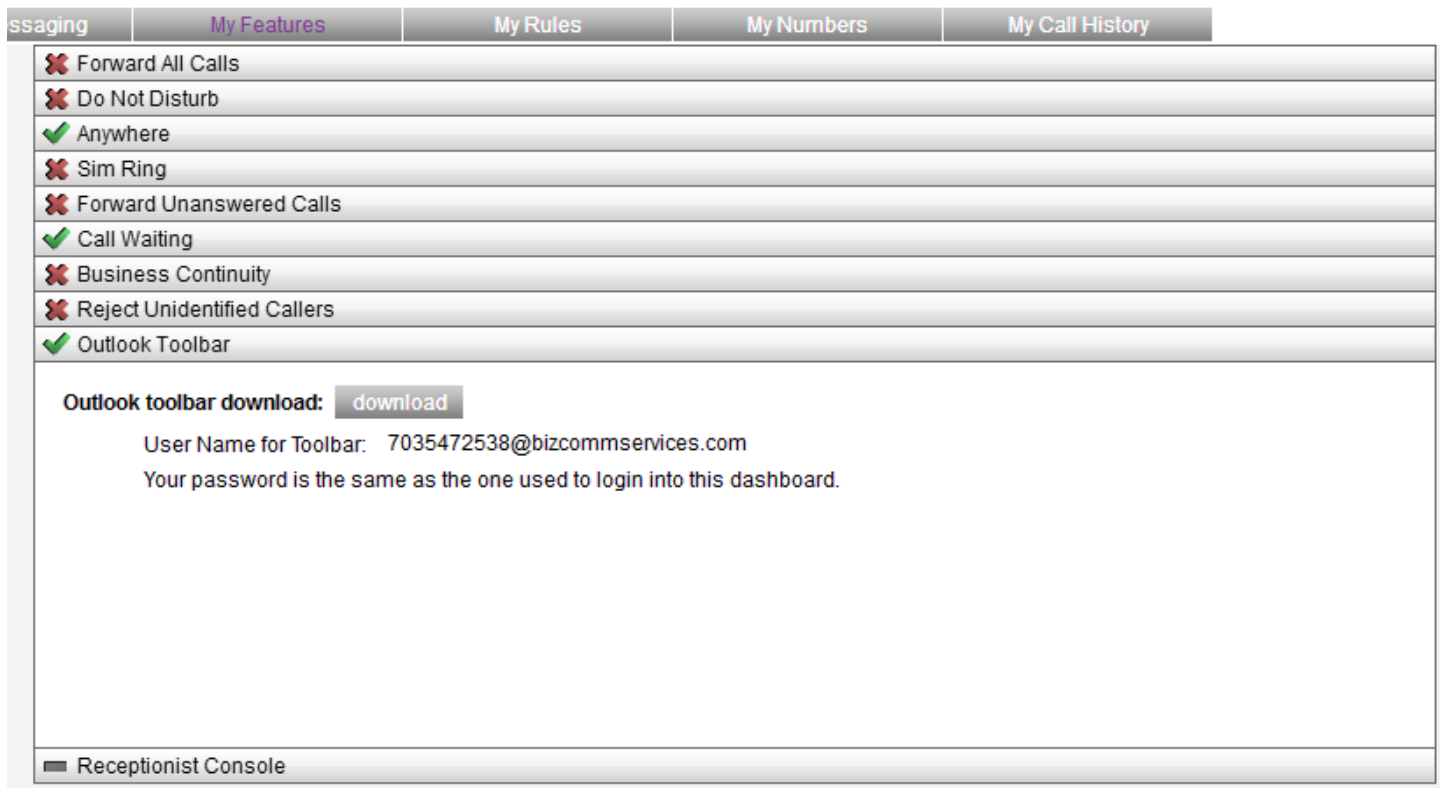
Figure 1: Downloading the toolbar installation package from MyPhone

Click on the download button and save the file to a temporary location on your hard drive. Sign out from MyPhone and close any and all web browser instances on your machine. If you run Outlook, close all instances of that program as well.

Locate the installation package that you downloaded and double-click on it to run it. Walk through the installation, accepting the defaults.

Configuring Internet Explorer/Firefox

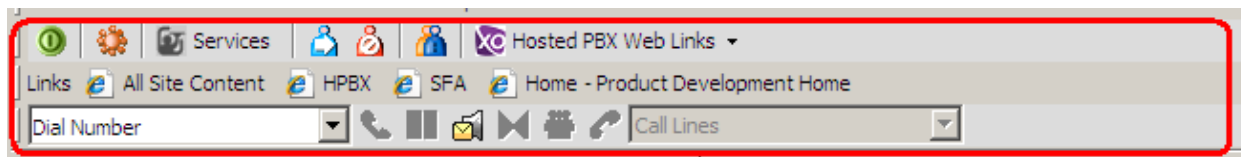Start Internet Explorer or Firefox. You should see the toolbar appear, as in Figure 2:

Figure 2: Toolbar as shown in Internet Explorer

If the toolbar does not appear, right click on the menu bar and verify that the two items *Telephony Toolbar Call Control* and *Telephony Toolbar Services* are checked.

Click on the Options icon (the 'orange flower', second from the left on the toolbar). A configuration screen will appear, like Figure 3:
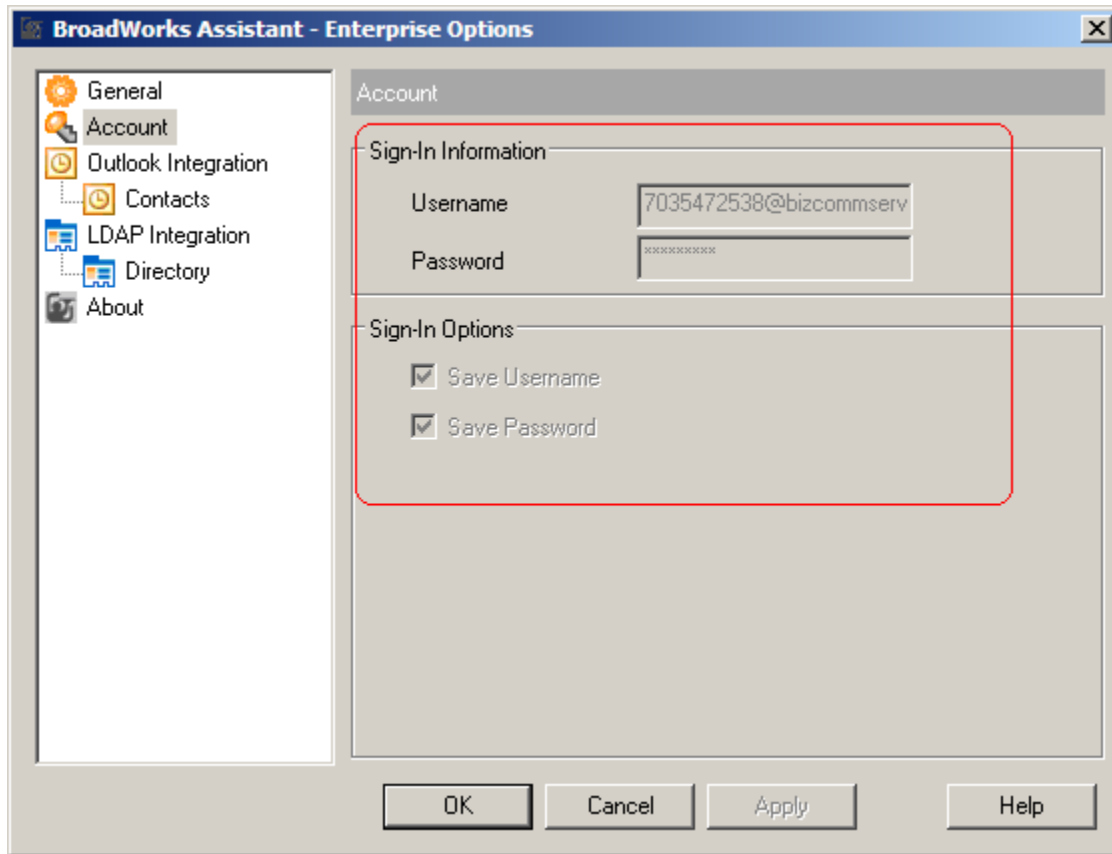
Figure 3: Setting username/password and login options in the toolbar

Select Account and fill in your username (of the form phonenumber@bizcommservices.com, where *phonenumber* is your Hosted PBX phone number) and password. Check the boxes beneath to save your username and password. Choose *OK* to save your settings.

Click OK and then click the gray on/off switch icon (leftmost icon in the toolbar) to log in. It will turn green when you are logged in. If it is already green, you don't need to do anything.

Configuring Outlook (Outlook 2010)

Start Outlook and navigate to the Backstage view (the *File* tab). Select *Options*, then *Add-ins*. The screen will look similar to Figure 4.
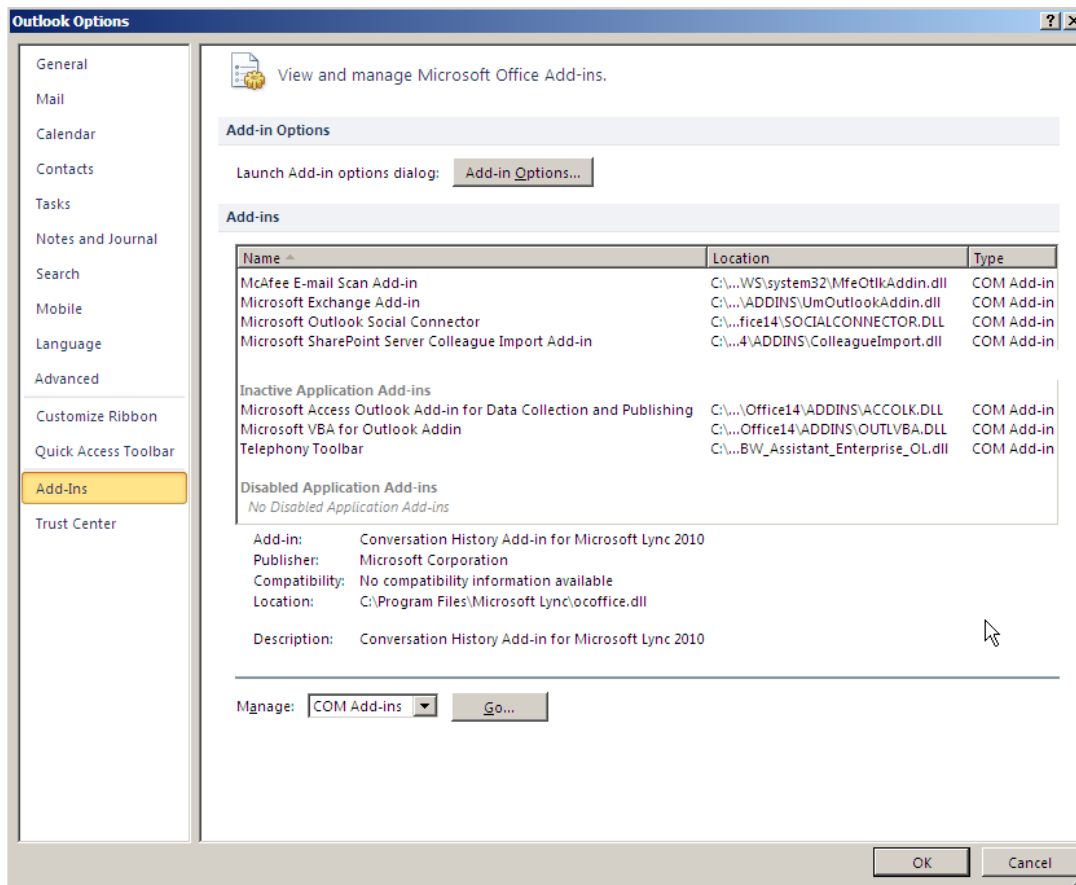
Figure 4: Outlook Add-ins configuration

The toolbar will appear as "Telephony Toolbar" in the list of add-ins. Verify that it is present and not in the category of "Inactive Application Add-ins". (If it is, select *COM add-ins* from the drop-down list at the bottom of the panel and click *Go*. Locate the Telephony Toolbar in the list, check the box next to its name and click OK. Restart Outlook.)

Using the toolbar – Internet Explorer/Firefox

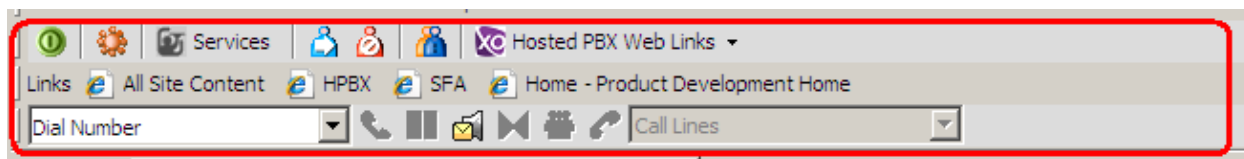When you start the web browser, the toolbar appears, like Figure 5:

Figure 5: Toolbar as shown in Internet Explorer

The first icon on the left is the "on/off button". If it is gray, this means you are not logged in. Click the icon to log in, and it will turn green to indicate that you are logged in. You can now use the features of the toolbar.

Using the toolbar – Outlook (Outlook 2010)

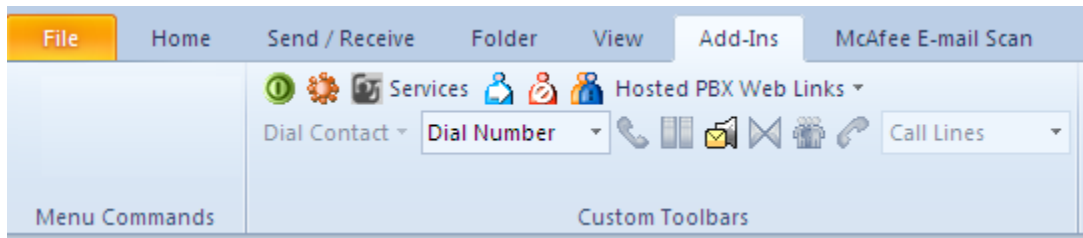In Outlook, the toolbar is available in the Add-ins tab, like so (Figure 6):

Figure 6: Toolbar as shown in Outlook (2010)

As in the Internet Explorer case, the first icon on the left is the "on/off button". If it is gray, this means you are not logged in. Click the icon to log in, and it will turn green to indicate that you are logged in. You can now use the features of the toolbar. For example, you can copy and paste a phone number from an email to the *Dial Number* box to call it.

In Outlook's Contacts view, the toolbar interface changes. Figure 7 shows the interface when a contact is opened:
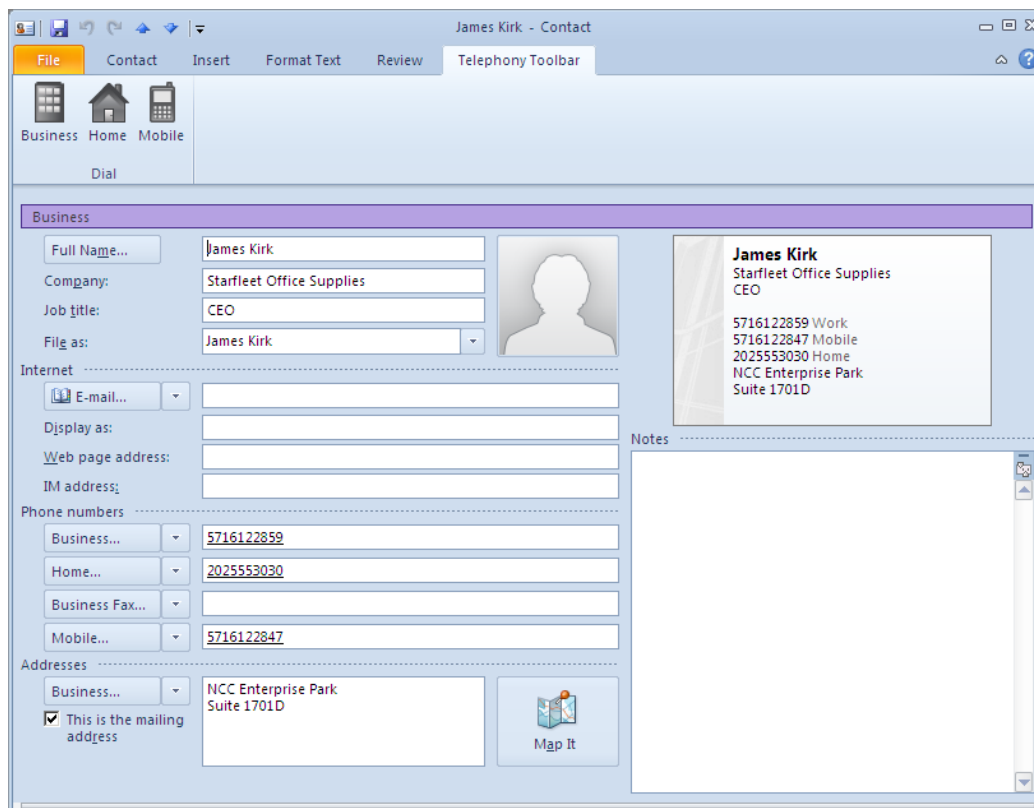

Figure 7: Toolbar interface when an Outlook contact is open

You can call the contact by clicking the appropriate button (Business, Home or Mobile) in the toolbar, and the toolbar will initiate a call from your phone to the corresponding number from the Outlook contact.

Where to go Next

The toolbar offers a number of features not covered in this quick start guide. Each installation includes a detailed manual that you can refer to if you need further assistance. By default, this manual is stored in the folder `C:\Program Files\Office Assistant\help` on your PC in PDF format. You can access this manual at any time, either directly, by navigating to the file and opening it, or by clicking the *Services* button on the toolbar and pressing the *Help* button in the panel that appears.

Revision History

Date	Version	Author	Details
04-25-2013	1.00	Gurung	Initial release
04-25-2013	1.01	Gurung	Added screenshots, updated instructions.
04-25-2013	1.02	Gurung	Updated header

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