



PoltyS Inc.

Unified Communications Solutions

CA Toolbar for MS Outlook 2013

Installation and Operation Manual

Version 1.0

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August 2013

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PRODUCT SUPPORT.....	ERROR! BOOKMARK NOT DEFINED.

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Installing CA Toolbar

Installing CA Toolbar for MS Outlook 2013

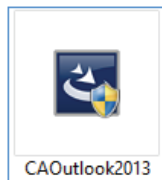
NOTES:

Make sure that both Microsoft Outlook 2013 and Panasonic CA Client 4.2 or higher are already installed on the target PC.

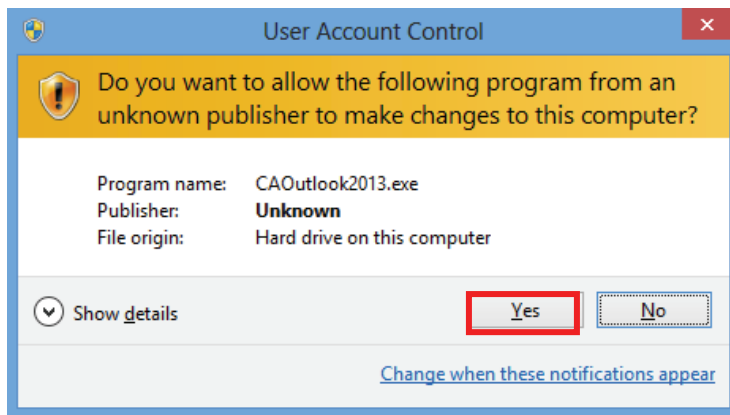
As prerequisite, Microsoft .NET 4.5 Framework requires to be installed before CA Toolbar for MS Outlook 2013. Therefore, the installer requests to connect to Microsoft .NET 4.5 download site. If the target PC has no connection to Internet, the installer cannot finish the CA Toolbar for MS Outlook 2013 installation normally.

To install CA Toolbar for MS Outlook 2013

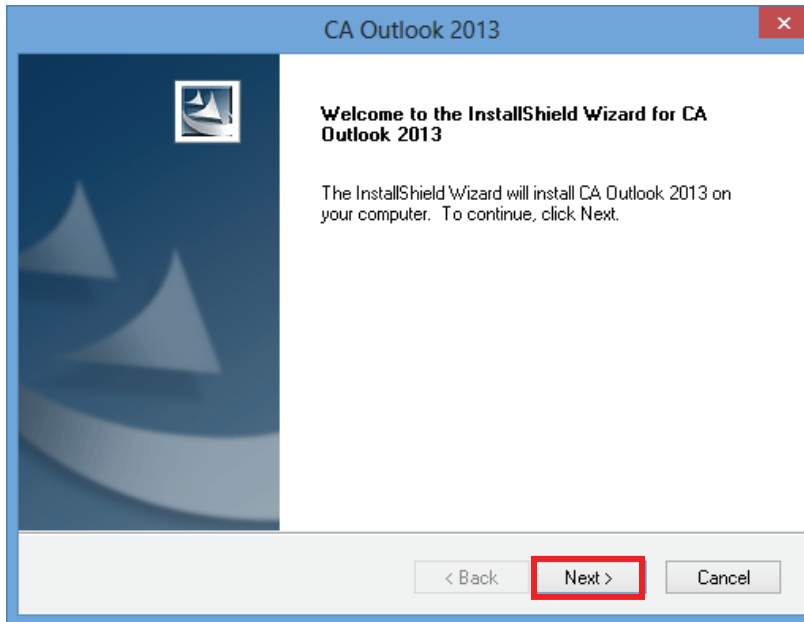
1. Double click on *CAOutlook2013* icon.



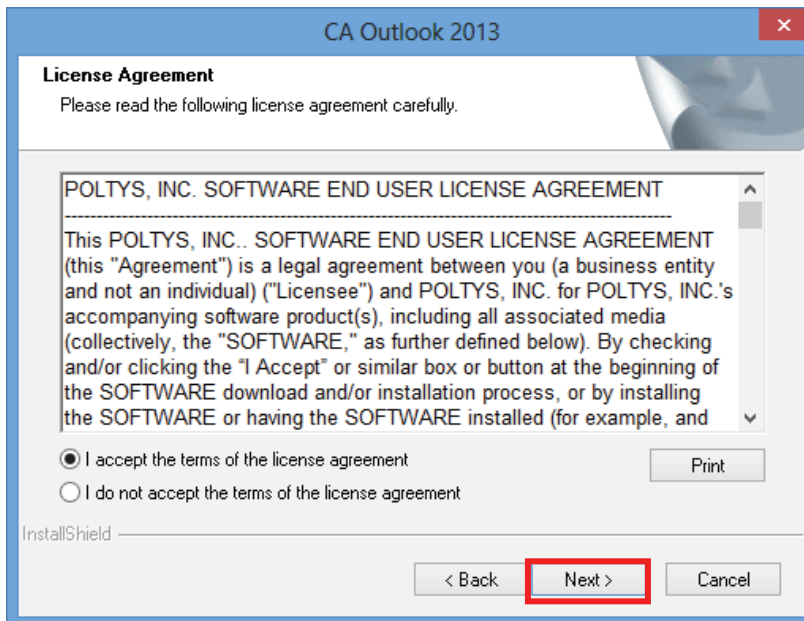
2. A warning message displays. Click on **Yes** button to continue.



3. The installation wizard main window displays. Click on **Next >** button.

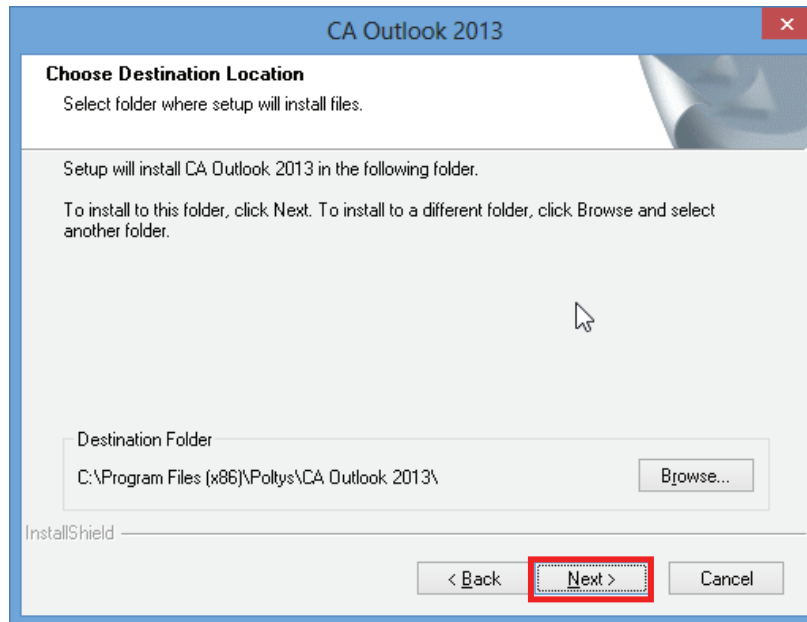


4. The *License Agreement* window displays. Select *I accept the terms of the license agreement* option and click on the **Next >** button.

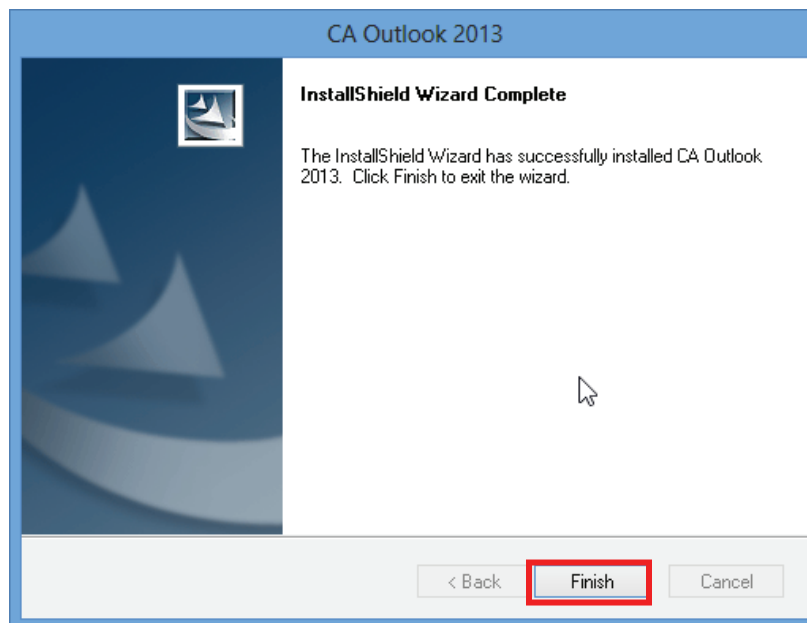


7 Installing CA Toolbar for MS Outlook 2013

5. The Choose Destination Location window displays. Browse for the folder you want to install into and click on **Next >** button.



6. The installation terminates. Click on **Finish** button.



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Using CA Toolbar

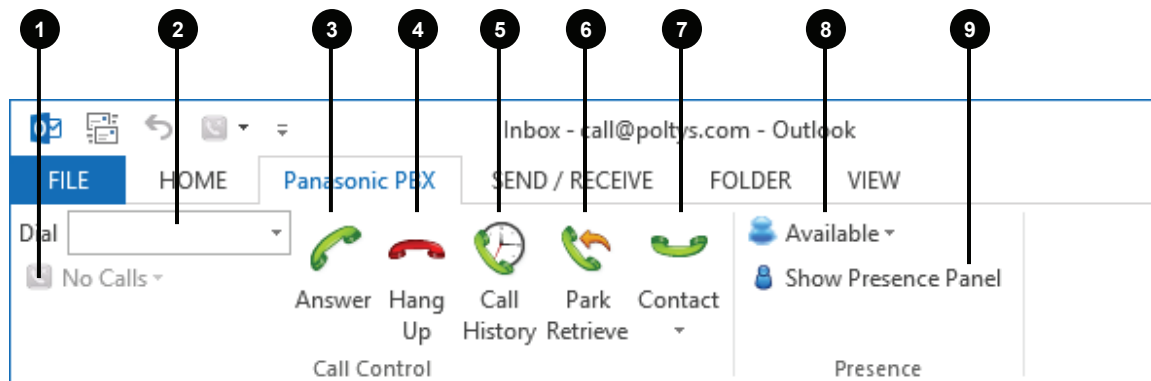
The section presents the following topics:

- [CA Toolbar for MS Outlook 2013](#)
- [Popup Outlook Contact Window for Incoming Call](#)
- [Unified Messaging integration with MS Outlook 2013 \(KX-NS1000 only\)](#)

CA Toolbar for MS Outlook 2013

You can make or answer calls directly from Microsoft Office Outlook 2013 using the CA Outlook 2013 Toolbar.

KX-NS1000 Unified Messaging features can also be accessed from Microsoft Outlook 2013. For more information, refer to [Unified Messaging integration with MS Outlook 2013 \(KX-NS1000 only\)](#) section below.

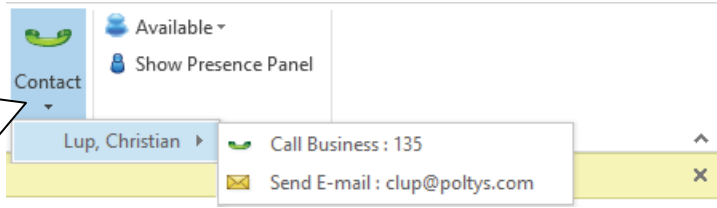


The following CA features can be accessed from Outlook 2013, as shown above. Many of the features are the same as in CA Client.

- 1 **Call status of current calls**
- 2 **Dial box**
- 3 **Answer**
- 4 **Hang up**
- 5 **Call History**
- 6 **Park retrieve**

7 Contact List

Click this button to display contact names and calling options for contacts who match the e-mail address of a currently selected message, or the information of the currently selected contact in Outlook.

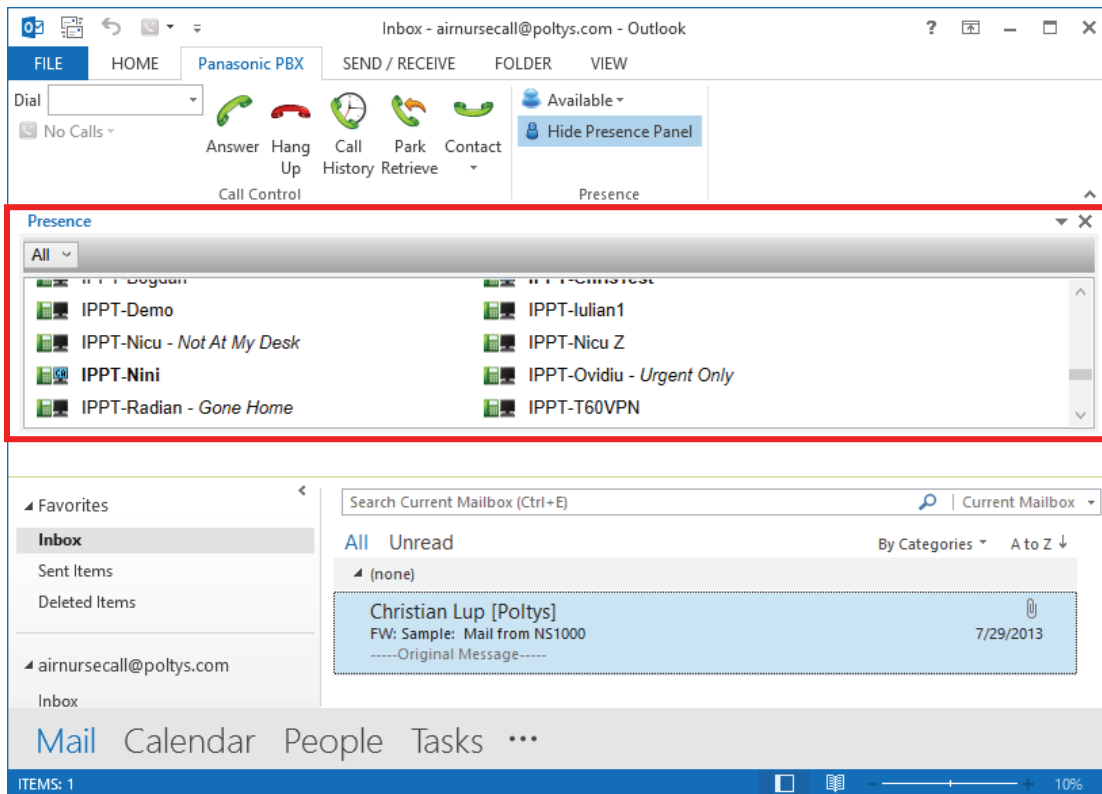


8 Presence settings

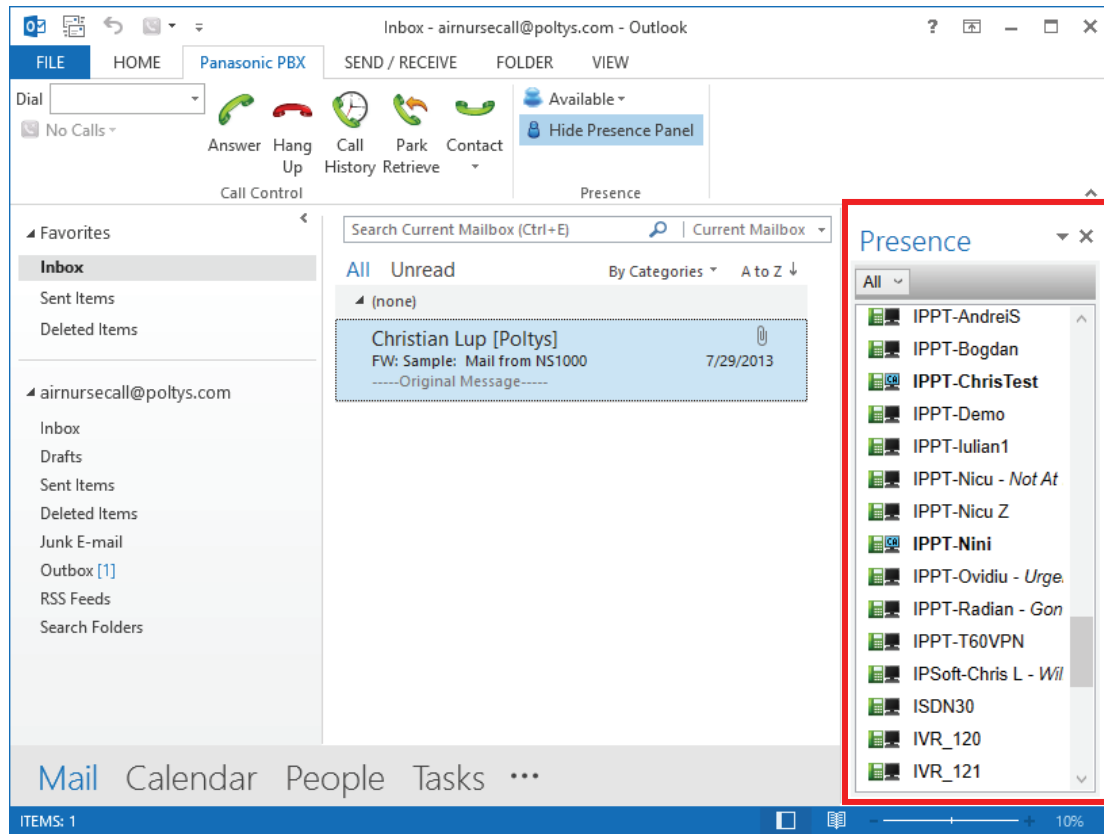
9 Show/ hide presence panel

Click this button to show or hide the presence panel. From the presence panel, you can make calls, send e-mails, and start chats with other users. The presence panel can be docked within Outlook, or be set as a free-floating window.

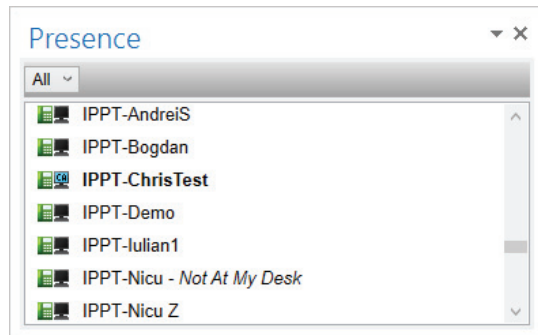
Presence docked to the top of Outlook



Presence docked to the right of Outlook



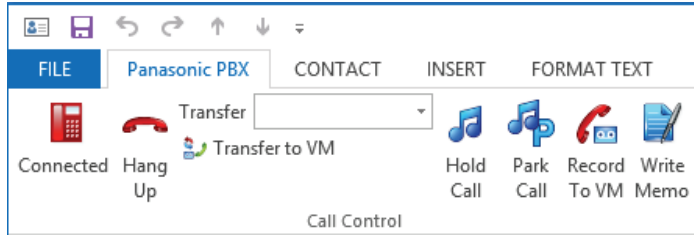
Free floating Presence



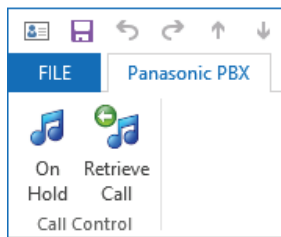
Call Control

Many of the call control features in CA are available from Outlook as well. During a call, the call control bar is displayed.

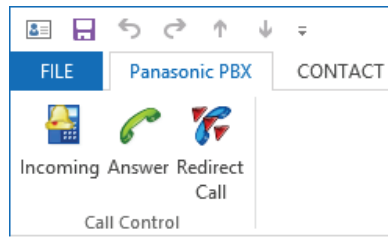
During a call



With a call on hold



Incoming call



Making Calls from Outlook Contacts

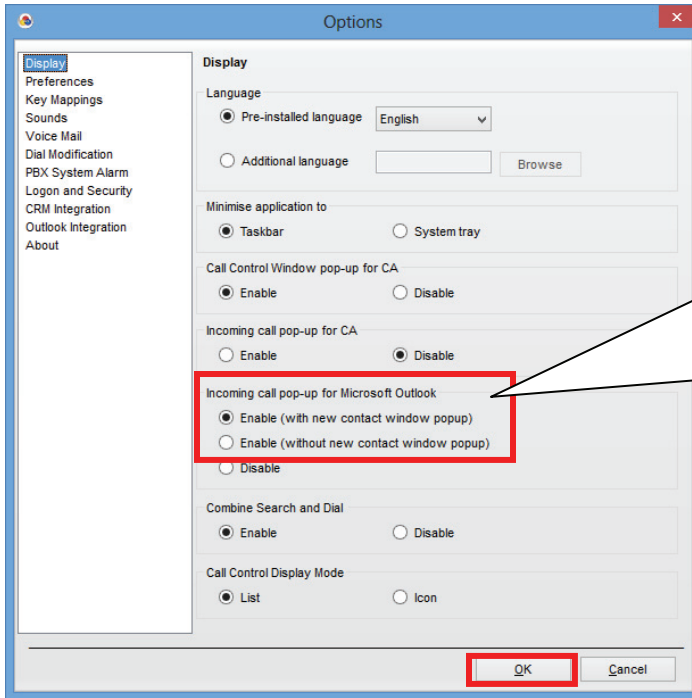
You can also make a call from your Outlook contacts. Click on a contact in the list.

Click on *Outlook (.Contacts)*.

Select a number to make a call.

Popup Outlook Contact Window for Incoming Call

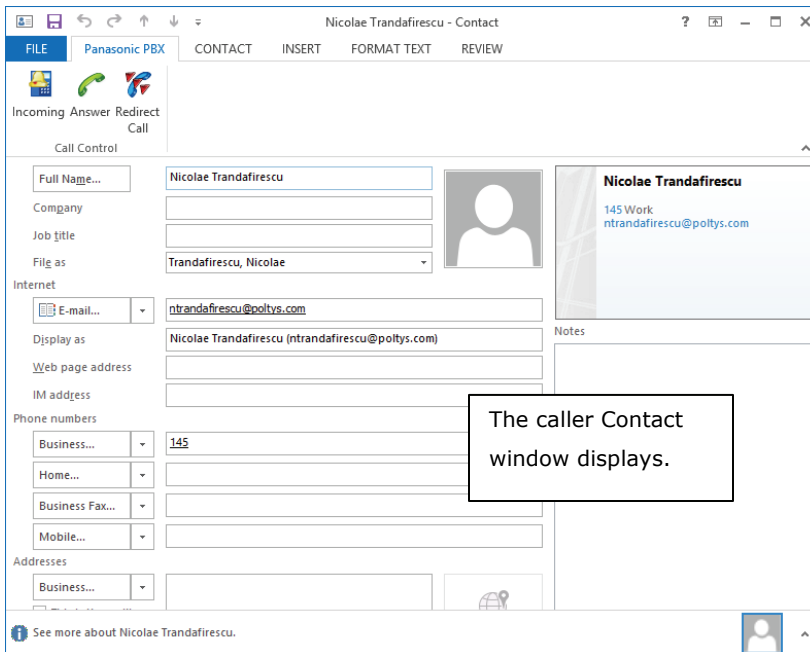
You can have an Outlook 2013 contact window popup when a call is incoming. To enable this feature, the following setup procedure is required in CA Client:



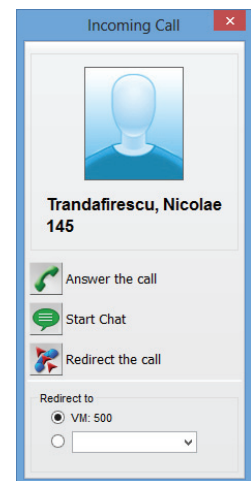
Choose one of the following:

- Enable (with new contact window popup)** - A new contact input window will pop up if a caller not in your contact list calls you.
- Enable (without new contact window popup)** - A new contact input window will not pop up if a caller not in your contact list calls you.

If selected, when a call is coming, the Outlook contact information of that caller will appear along the regular CA pop-up window.



The caller Contact window displays.



Unified Messaging integration with MS Outlook 2013 (KX-NS1000 only)

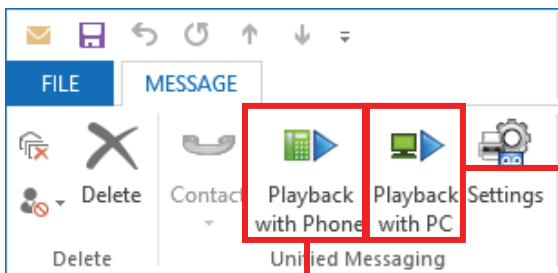
If you login to a KX-NS1000 PBX, you can also access the following features with Outlook:

- Voice and fax messages can be received directly from the PBX as e-mail attachments by using IMAP to access the PBX's stored Unified Messaging system data.
- Voice messages can be listened to using a telephone or PC.
- Fax messages can be viewed using a PC.
- The Message Waiting Indicator on your telephone will turn off when the mail item is opened in Outlook.
- You can call back the person who left the message or fax if his or her information is available in your contact information, or if a caller ID number is available.

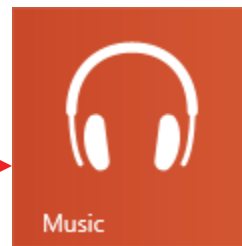
Note: A Unified Messaging e-mail activation key (KX-NSU2xx) is required to receive e-mails from the PBX to the e-mail client.

Listening to voice messages

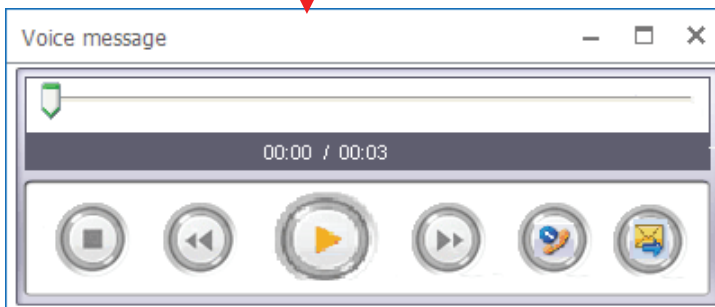
Voice Message



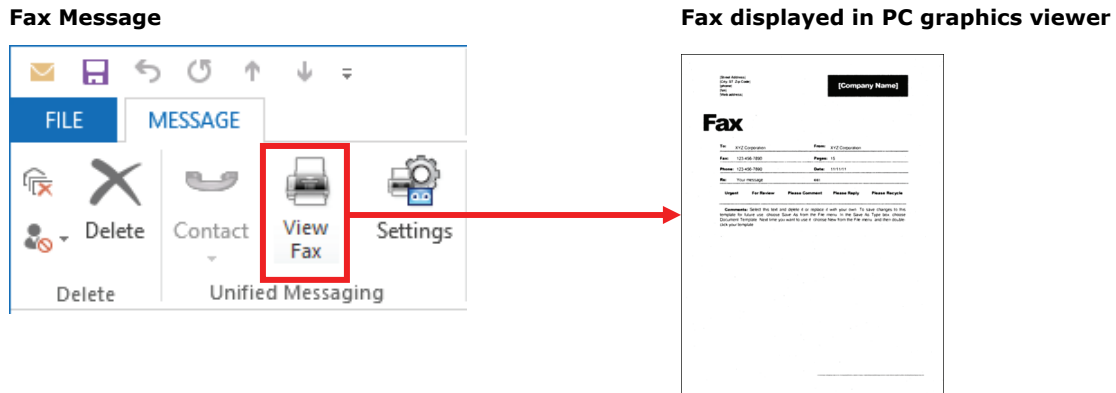
Playback done via PC audio player



Playback via phone by PC operation



Viewing faxes



Account Setup

An additional account must be set up in Outlook for usage with the Unified Messaging system, separate from your usual e-mail account. The setup procedure will vary depending on the version of Outlook used and the configuration of your network. When adding the account, the settings must be specified as follows:

- The type of the account must be set to IMAP.
- The mail server must be set as the IP address of the PBX where your UM mailbox is located.

Note: In a One-look network, the UM mailbox may be located on a Slave unit and not the Master unit. Ask your network administrator for details.

- The user name is your UM mailbox extension number.
- The password is your UM Message Client Mailbox Password.
- Specify a valid SMTP server, for example the SMTP server used for your existing mail account.

If you are unsure of any of these settings, ask your network administrator for details.

Offline Settings

When using IMAP to access voicemail and fax messages, additional PBX system resources are used.

To reduce the possibility of affecting PBX operation, Microsoft Outlook 2013 should be configured to operate offline for the UM mailbox. For information about configuring Outlook for working offline, refer to your software's documentation, or consult your network administrator.