



# Telephony Toolbar

AKA Outlook Toolbar

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For use with MS Internet Explorer, MS Outlook, Mozilla Firefox  
Document Version: 4

This guide is designed to give you setup, installation and training for the toolbar. For more help, please call customer service or email [training@broadcore.com](mailto:training@broadcore.com).

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## Installation

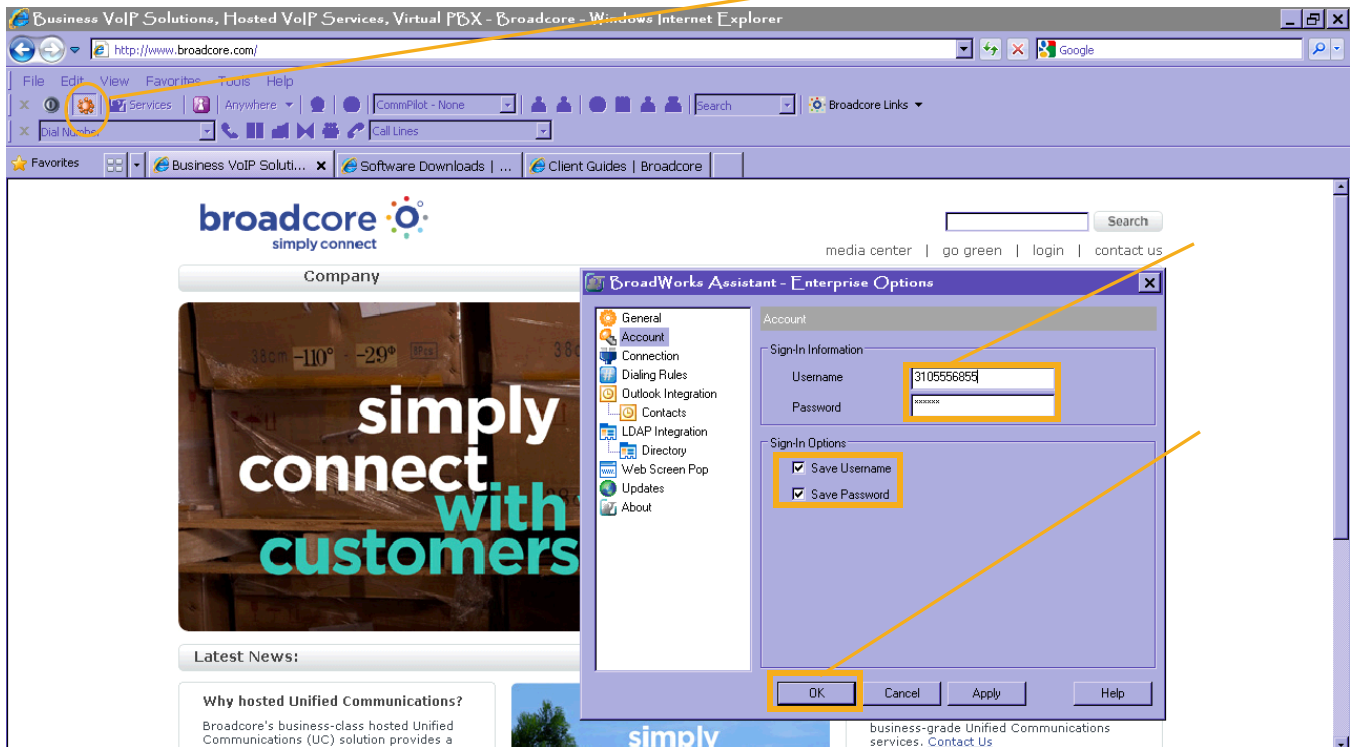
- Simply download the file from our website.
- Close MS Outlook, Internet Explorer, and Mozilla Firefox.
- Install the .msi file.

### *One-time Setup*

- Click The Red Flower in The Toolbar.
- Under Username: enter your 10-digit phone number with no dashes, no spaces.
- Under Password: enter your web portal password.
- Optionally, Check Save username & password.
- Click OK.

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# Telephony Toolbar



The first time you log in the system may request that you change your web portal passcode. The passcode must be at least six characters. Letters, numbers and symbols are allowed and strongly recommended.

This is your first login attempt or your password has expired. You must change your password before proceeding.

Old Password:

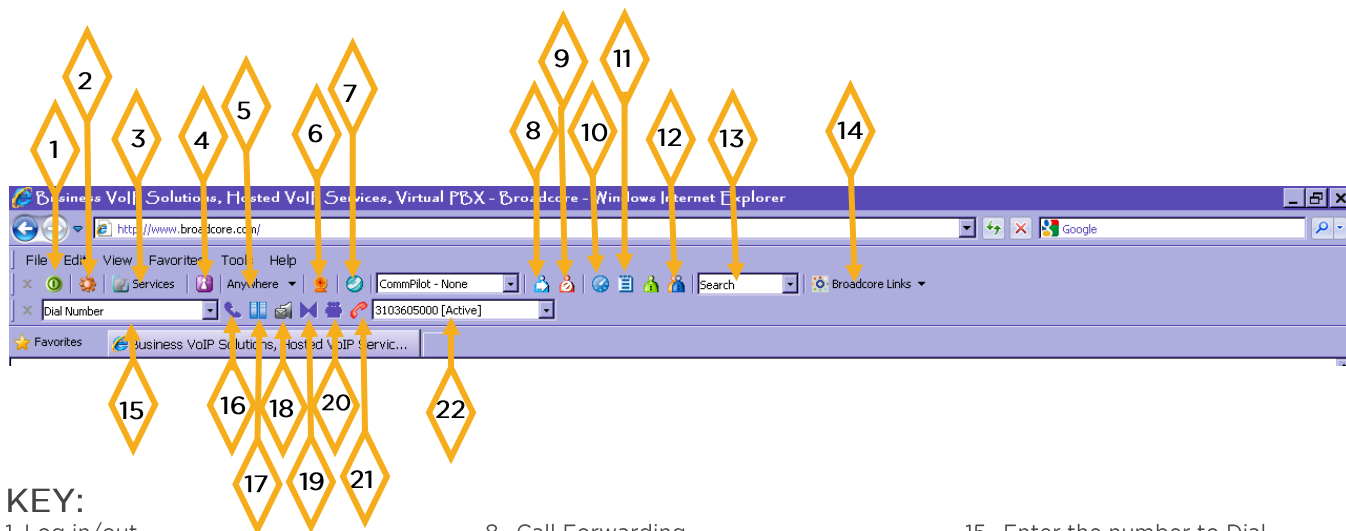
New Password:

Confirm New Password:

## Orientation

The bar has many built in one-click functions.

If you choose a selection that has not been set up, the services box will open for you to enter details. For example the first time you use Call Forwarding, a box will open where you enter the call forwarding destination number. For future uses of the feature click the button here, or click services.



### KEY:

- |                                |                            |                              |
|--------------------------------|----------------------------|------------------------------|
| 1. Log in/out                  | 8. Call Forwarding         | 15. Enter the number to Dial |
| 2. Account Settings            | 9. Do Not Disturb          | 16. Answer                   |
| 3. Services                    | 10. Speed Dial 8/100       | 17. Hold                     |
| 4. Auto Portal Login (IE only) | 11. Call History           | 18. Call Voicemail           |
| 5. Broadcore Anywhere          | 12. Group Directory        | 19. Transfer                 |
| 6. Remote Office               | 13. Search Outlook & Group | 20. Conference               |
| 7. Sim Ring                    | 14. Important Links        | 21. End Call                 |
|                                |                            | 22. Active and Held Calls    |

## Dialing from the toolbar

This is just one way to dial.

- Click where it says “Dial Number” in the toolbar.
- Type a number or paste it in the box.
- Press enter on the keyboard.
- Your phone will go off hook automatically and you will be connected to that contact.



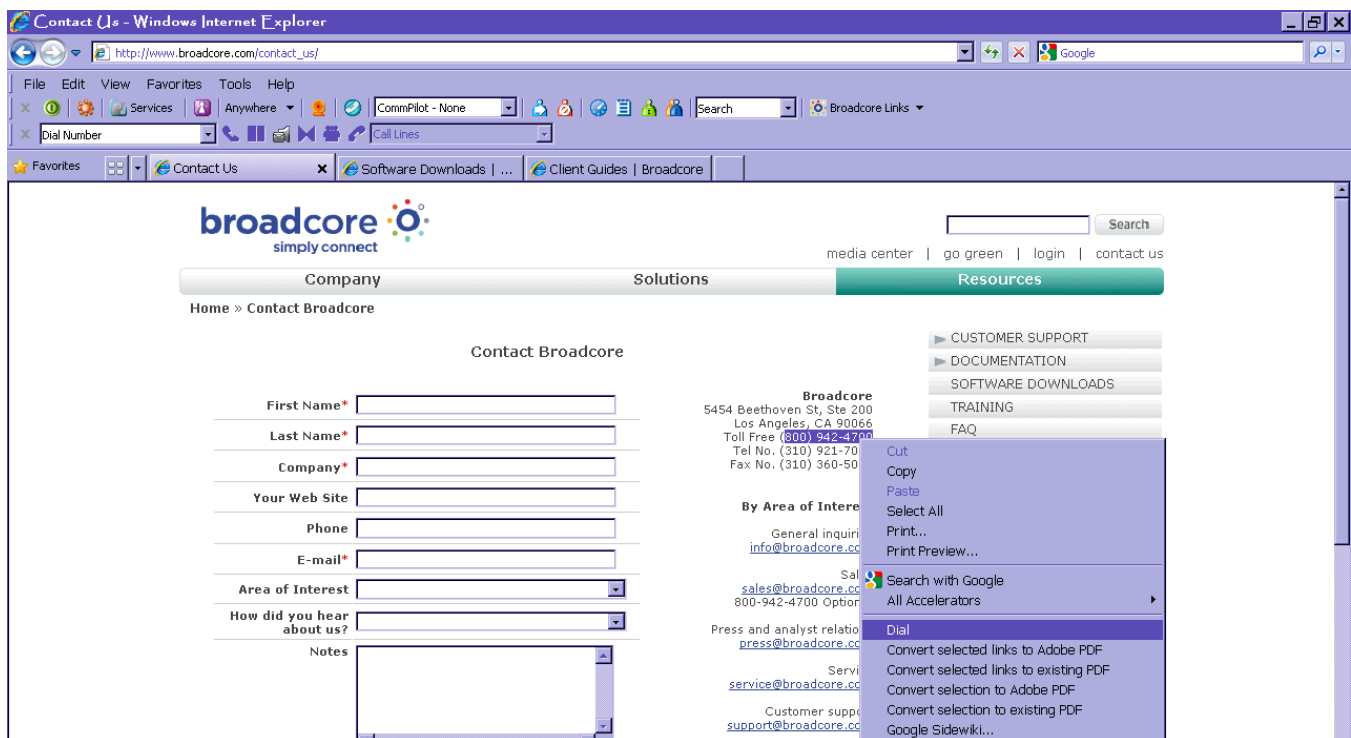
## One-click dialing

Another way to dial from the toolbar is One-Click Dialing. You can dial from Speed dial, group directory, call history, search results, etc.

- Simply click the list that has the numbers you want to display on your screen.
- Click the number you'd like to dial.
- Your phone will go off hook automatically and you will be connected to that number.

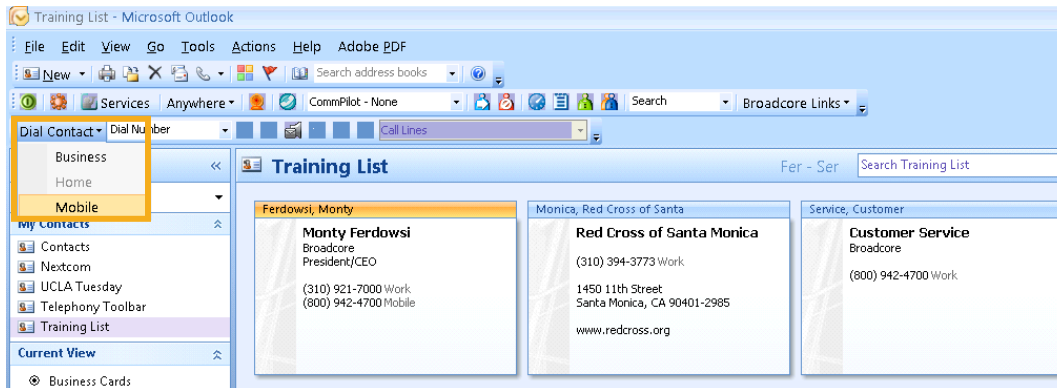
## Dialing from Internet Explorer/Mozilla Firefox

- If you are searching the web and find a number you'd like to call,
- In your Browser,
- Highlight a phone number.
- Right Click on it.
- Click Dial.
- Your phone will go off hook automatically and you will be connected to that contact.



### Dialing from Contacts

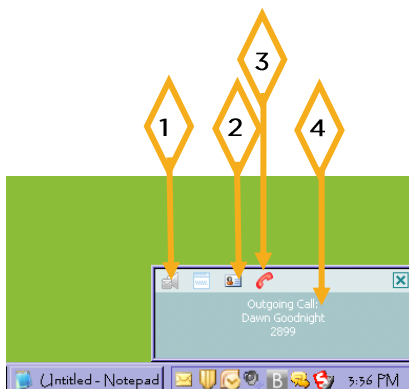
- In Outlook,
- Single Click Contact, to Highlight.
- In Toolbar at Top, Click Dial Contact.
- Click the number (Business, Home, Etc.)
- Your phone will go off hook automatically and you will be connected to that contact.



### Notifications

In the bottom right corner you will see a pop up when you make or receive a call.

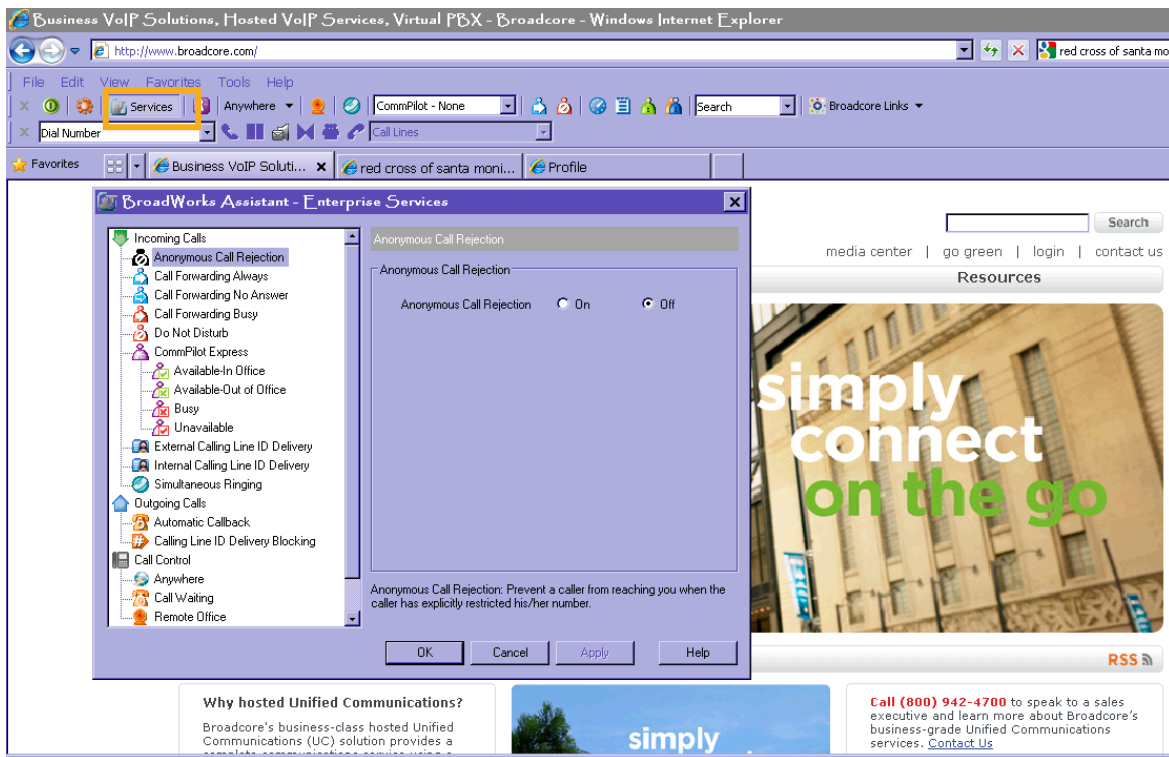
- Click in the main box to answer. Your phone will go off hook.
  - Diagram Point 4.
- Click the direct to voicemail button to send the incoming call directly to voicemail.
  - Diagram Point 1.
- Click the vcard icon to create an Outlook Contact for this user.
  - Diagram Point 2.
- Click the red phone icon to have the call rejected. The call will stop ringing on the phone and will eventually go to voicemail.
  - Diagram Point 3



## Advanced Feature Control

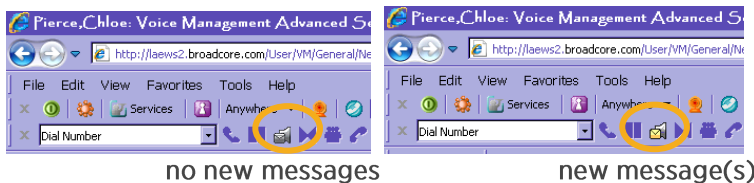
You can utilize features such as Call Forward, Simultaneous Ring and View Speed Dials.

- Click Services.
  - Select one of the services.
  - Read the brief description to find out about that feature.
  - Turn on and off the features by clicking the appropriate button.
  - Press OK at the bottom to save changes.



## Voicemail

You can tell you if you have messages using the icon on the toolbar.



While the phone is idle you can click this button to get into your voicemail box.

## Basic Troubleshooting

### Vista and Windows 7

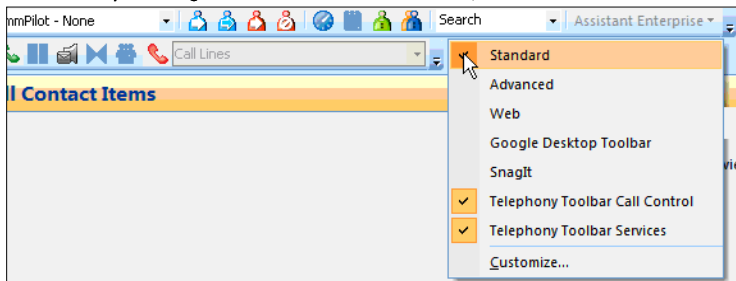
If you have Vista or Windows 7 please see special installation instructions on our website. [http://www.broadcore.com/picts/articles/vista\\_and\\_win7.pdf](http://www.broadcore.com/picts/articles/vista_and_win7.pdf)

#### Toolbar Not Visible

If the toolbar is not visible in Outlook, follow these steps. If the problem is not solved, contact customer service.

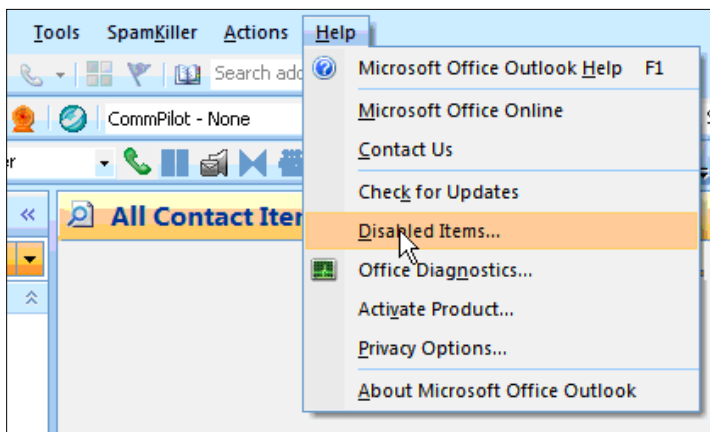
Make the Toolbar visible:

- In Outlook, Right-click an empty area of the toolbar region.
- In IE or Firefox, Click View>>Toolbars
  - A menu appears listing all the toolbars currently registered.
- Make sure that these entries (*Telephony Toolbar Call Control* and *Telephony Toolbar Services*) are checked, as shown below.



If the Toolbar entries are not listed in Outlook, continue with the next step.

- Register Assistant within Outlook
  - Click on Help or About Microsoft Office Outlook.



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- Help Dialog, Disabled Items
  - In the dialog box select *Disabled Items*. If the *Telephony Toolbar* is visible on the list, click Enable and restart Outlook.

If the Toolbar entries are not listed in your browser call customer service.