



**The 5-point Guide to  
integrating Microsoft with  
your Telephone System**

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# Introduction

Microsoft is the most widely used computer software in business today. People use the Outlook calendar for their diary and Outlook contacts for details of people they deal with on a daily basis. Quite often the Outlook contacts will be entirely different to the telephone system directory.

In this easy to understand guide we explain how a common directory using Outlook contacts can be used for the whole of the business. This makes sure that all staff have easy access to the same telephone directory.

Businesses quite often use Outlook for their emails. This is quite often different to the voicemail system, which is attached to the telephone system. In this guide we also explain how the Outlook email graphical user interface can have voicemails integrated into it to provide one point of contact for your information, whether it be email or voicemails.

The other major productivity tool, which Microsoft provides, is the Outlook calendar to enable users from anywhere to be able to check their diaries and book appointments. This is typically accessed from laptops or PDAs. Actimax have provided a methodology for integrating this with the telephone system operator console or alternatively obtaining this information by telephoning in and converting the diary into a speech activated system. By similar methodology, we also explain how you can have your emails read back to you over the telephone.

With the right specialist support it is easily possible to use both voice recognition to enable databases and software to recognise voice commands and also to convert electronic information into speech to enable you to obtain information without having to have a PDA or laptop.

The purpose of this guide is to help you obtain best use from the software you are already using to run the rest of your business.

# Screen Popping And Screen Dialling

Two of the most important tools in business are the telephone and the computer. It goes without saying, then, that linking the two can deliver significant productivity improvements and customer service benefits.

The process by which this is done is called Computer Telephony Integration (CTI). An interface between the telephone system and server allows data to be exchanged between a computer database and phone system, instantly giving telephone users the information needed to answer and process calls quickly and effectively.

Such technology has been implemented in large call centres for some time but CTI applications are becoming more common in all office environments as businesses attempt to improve customer service and increase the productivity of staff who handle large volumes of incoming or outgoing calls, such as those employed in help desks, sales teams and technical support. (One long sentence – see if you can split it into 2 or 3 parts).

The classic CTI application is ‘Screen Popping’ which uses CLI (Calling Line Identity) to identify callers and display their database records and customer information on screen before a call is answered, thereby improving the speed with which each call can be handled.

In addition to the customer service benefits of greeting a caller by name, Screen Popping data from a customer database, for example, gives help desk staff the information needed to deal with an enquiry in one call. Should the caller need to speak to someone else their details and the updated customer record can be transferred with the call, eliminating the need for callers to answer the same questions all over again.

When potential customers ring back after making initial enquires, sales staff will have a complete record of the status of their enquiry, enabling them to provide an informed and professional service.

Another useful CTI application is on screen dialling which lets you make calls by highlighting a customer’s telephone number and clicking the call button. Calls can be made by clicking on names in phonebooks; in lists of previous, missed or unanswered calls; or directly from a wide range of popular sales databases and CRM packages.

## Screen Popping And Screen Dialling Continued

Quite often companies will have a separate telephone operator directory or speed dials to their Outlook contacts. This technology helps businesses use the same Outlook contacts diary for both email and telephone numbers. By clicking on the screen the telephone number can be dialled instantly without the risk of making mistakes and when callers call in the Outlook contact screen pops to enable the staff to know who is calling them.

# Integration Of The Outlook Diary With Your Telephone System

There are two ways of doing this. There is available today an interface that will interface with any telephone system to enable the user to telephone in and use voice recognition to get their calendar and book appointments. This means that while on the road without necessarily having a PDA or laptop the remote worker can find out his movements and also organise appointments for him and others.

Other methods of integration enable businesses which already have an Outlook calendar to have this as part of their telephone operators console to enable the operator to tell users when they phone in what the movements of staff are.

The benefits of integration with Outlook are:

- Voice-activated access to messages – provides users the ability to navigate and manage messages – voice, fax and email from any phone
- Locate and find employees at secondary numbers, such as a mobile phone.
- Return calls by enabling users to easily call back by simply stating the request rather than looking up and dialling numbers.
- Record call, which will allow users to record a live conversation for later reference.
- Immediate message notification, which provides users the ability to respond quickly by receiving pager or SMS notification.
- Call from contacts, which enable users to call other employees, unique phone numbers, or people listed in their contacts database through the use of a speech-enabled personal assistant.

## Integration of Microsoft LCS

Microsoft Live Communication Server is a relatively new piece of Microsoft software, which enables instant messaging to be used within organisations and between organisations securely and safely.

One of the other potential benefits of this is also the integration of telephone voice calls with soft phones (which are telephones that are used on a PC) into the same unified platform. This enables messaging and live voice calls to be made via your PC very easily. Instant messaging is much quicker than email and provides instant information.

Actimax can provide:

- A client application that provides a user interface to LCS, which is similar to MSN messenger but much more powerful.
- Integration to Microsoft applications such as Outlook, Office, CRM etc. with basic Softphone call control.
- Integration to public instant messaging services, such as MSN, AOL and Yahoo

## Integration of Emails

The Universal use of email, voicemail, and mobile phones and even fax machines means that it is easier than ever to communicate with colleagues and business contacts. Even if someone is unavailable to talk to you, you can leave him or her a message putting the onus on him or her to return the call.

Unfortunately, people rarely leave just one message, but instead leave messages on a string of different communication devices. While this does increase the likelihood of a message being received, so called messaging inflation can be a nightmare to manage, requiring users constantly to check separate inboxes on mobile phones, PCs and telephone systems.

As well as being time consuming, juggling between inboxes makes it likely that some messages will be lost or simply not replied to.

Unified Communications, often referred to as Unified Messaging (UM), combines voice, fax and e-mail messages in one inbox, such as Microsoft Outlook or Lotus notes and makes them accessible via telephone, wireless device, computer or the internet. Companies that adopt unified communications can gain a competitive advantage through increased mobility and productivity, better customer service and lower costs. (Have you got any evidence/examples/case studies of this that we can use as a third party illustration?)

By effectively being available to manage and receive messages wherever you are, you need never again miss an urgent call or message. When at your PC, it becomes possible to access all messages on the same screen, showing the date, message type, status and sender. If away from your office you can instruct your system to notify you, wherever you are, of specific messages or those from specific senders. All your urgent messages – voice, fax and email – could be forwarded to your mobile phone, for example!

Whilst driving to work or between appointments you can listen to e-mails being read out using text to speech technology. You can manage these messages using prompts that allow you to save, delete, forward or even reply to any message in your inbox with a voice message of your own. Voice activated message management means that all this can be done completely hands free – ideal for when you are out on the road.

## Integration of Emails Continued

Not long ago Captaris estimated that having just one inbox for voicemail, fax and email messages could cut the time spent accessing and responding to messages by up to 50% for office-based workers and 70% for mobile workers. This makes it easy to cost justify a UM system: in some cases, the ROI (return on investment) can be achieved within the first year (dependant upon usage), with the promise of further cost savings well into the future.

A further benefit, at a time when businesses are under more pressure than ever to keep records of all business communications, is the ability to create an archive of all messages once they have been dealt with. Should a business ever be required to produce records of email or voicemail messages as part of a legal dispute, a simple automated search through the UM archive would quickly yield the appropriate files.

Unified messaging is a technology, which enables voicemail to be integrated into the same email graphical user interface. For example users can dial into their Outlook interface via a telephone and get back their voicemail, fax messages or email messages over the telephone. Similarly the same interface can be accessed via a laptop to enable fax, voicemails and emails to be obtained without telephoning the office by just dialling in on a connection to your local area network. Voicemails and faxes can also be forwarded and dealt with by the user.

If you would like to know more about the Actimax offers please call 01268 243900 and ask for Debbie Keith. We can also provide a free on site consultation if needed.

## ABOUT ACTIMAX

Actimax, established in 1997 has a firm track record of proven results and satisfied customers in the telecommunications market. Our core business is the supply, installation and maintenance of communications systems, and our strength is in the technical background of our team of 38 employees.

With a management team that have worked together for a combined total of over 75 years, we are a hard working company that knows where it is heading. The experience of John Massey Managing Director who's background in the communications industry goes back over 30 years is invaluable in the company being one step ahead of the competition. Actimax invests over 50k per annum on training it's team, including technical engineering courses, management courses, sales and marketing seminars and we also recently offered Learn Direct courses to the whole company, which saw a good up take. The company ethos is to keep our team, happy, motivated and interested, that way they are more likely to stay with us. This has proved to be a benefit with 60% of our team having been with us for over 3 years,

We provide communications hardware from five leading manufacturers along with a whole portfolio of supporting products. We have gained superior accreditation with all of the suppliers we work with, along with awards for Customer Care and Service ( 2004 and 2005 ) , Comms Channel Reseller of the Year 2005, Essex Business of the Year 2005 and Business-to-Business winner 2005.

Our target market are companies, either single or multisites with over 20 employees, and with no upper limit. Our market sector is any company looking to improve their process and procedures along with increase in sales, cutting costs and improving service, and we have been especially successful in Government, Financial, Travel and the Motor Trade.

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