Outlook and Exchange operations

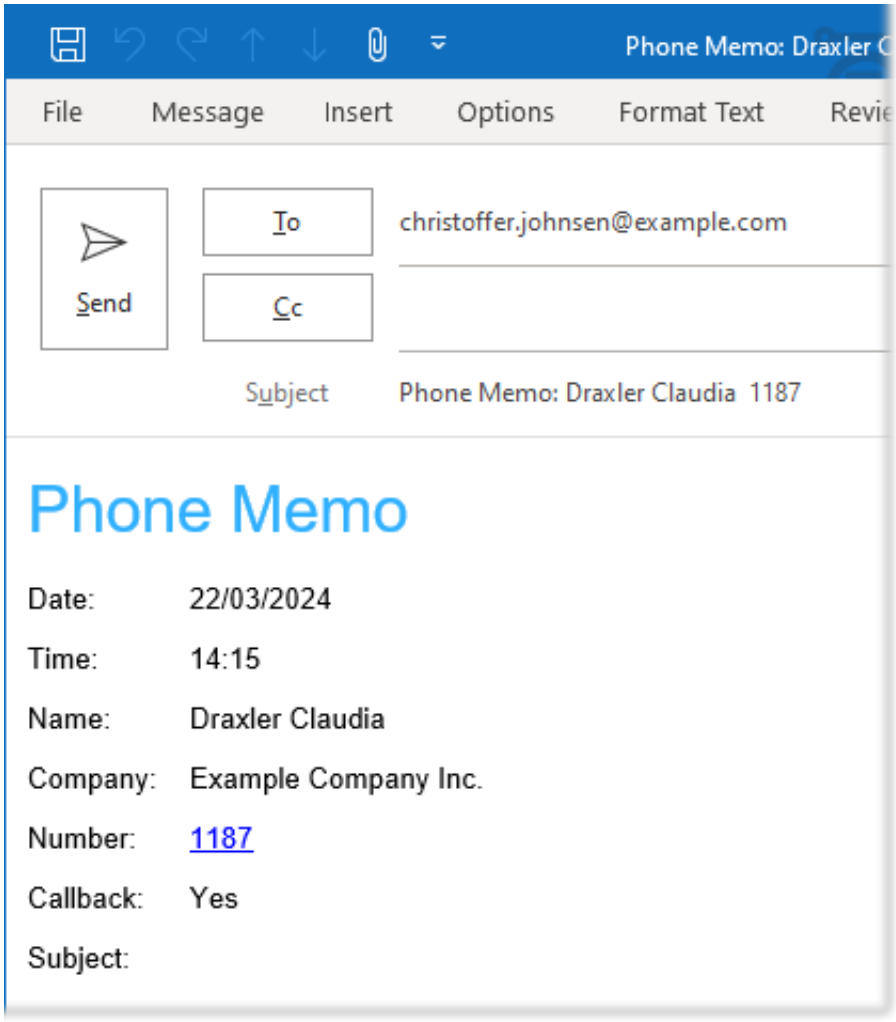
The following functionalities are only available if Outlook features are enabled. Go to Settings > Outlook and make sure that Enable Outlook Features is checked.

Create an Outlook contact

You can create an Outlook contact from the remote party of a call by right-clicking the call and choosing Create Outlook Contact from the context menu. Microsoft Outlook's *New Contact* window will appear, the Phone number field being populated with the phone number of the call. Any other info can be entered manually. This option is available for current calls as well as completed calls (i.e. call history entries).

Phone memo

The operator can write a phone memo during or after the call. Select a call from either the *Calls* or *Operator* pane and click the Phone Memo button from the ribbon bar. Alternatively, you can right-click the call and choose Phone Memo from the context menu. Microsoft Outlook will open a *New Email* window with the mail body containing several call details in a pre-formatted view. If you also have a user selected in the *User* pane, the mail's To field will be populated with the user's mail address. You can edit the mail manually before sending it.



Customize phone memo template

You can customize the template of the phone memo by creating a template file using HTML and embedded CSS.

The following code shows the the default template used by COC, which you can use as a base for your custom template.

```
<html>
    <head>
        <style type="text/css">
            td {height: 28px; font-family: Arial; font-size: 10pt;}
        </style>
    </head>
    <body bgcolor="#ffffff">
        <table border="0" cellspacing="0" cellpadding="0">
            <tr>
                <td colspan="2" style="padding-bottom:10px;">
                    <h2><font color="#30B0FF" face="Arial">Phone Memo</font></h
2>
                </td>
            </tr>
            <tr>
                <td>Date:</td>
                    <td width="800px">@Date@</td>
            </tr>
```

```
            <tr>
                <td>Time:</td>
                <td>@Time@</td>
            </tr>
            <tr>
                <td>Name:</td>
                <td>@Name@</td>
            </tr>
            <tr>
                <td>Company:    </td>
                <td>@Company@</td>
            </tr>
            <tr>
                <td>Number:</td>
                <td>@PhoneNumber@</td>
            </tr>
            <tr>
                <td>Callback:</td>
                <td>Yes</td>
            </tr>
            <tr>
                <td>Subject:</td>
                <td></td>
            </tr>
        </table>
    </body>
</html>
```

You can use the following wildcards to insert the call details into the template:

@Date@	The date of the call
@Time@	The time of the call
@Name@	The name of the caller
@Company@	The company of the caller
@PhoneNumber@	The phone number of the call

Safe the HTML file under the name PhoneAnnotation.htm at the location <*user directory*>\Documents\CTModule\COC\.

The file extension needs to be .htm, not .html.

The custom HTML code will be used as email template whenever you create a new phone memo.

Exchange synchronization

COC Clients can synchronize with Microsoft Exchange through Callisto: Users can have their presence state automatically changed based on their Exchange calendar. For example, if a user has an appointment entered in his Exchange calendar, the COC Client will set his presence state to “busy” during the time of the appointment. Additionally, during Outlook meetings, details such as the meeting description, location and the time are displayed in the *Details* pane and the *Operator* pane.