Integration with Office 365

Features:

1. 3CX integration with Office 365 contacts

A plugin opens the contact record in Office 365, creates a new contact if the inbound caller is not found, and saves the call information in the contact’s notes.

1. Launch outbound call from the Office 365 interface

Available using the 3CX “hotkey dialing” feature. You simply select the phone number in the Office 365 interface and press the configured hotkey in order to dial to that number and automatically connect the call to your extension.

System Requirements

* 3CX v15 PRO edition
* The 3CX client for Windows installed and running
* An Office 365 account

Deploying the Office 365 Integration:

1. From the 3CX Management Console you need to download the plugin from the 3CX update server to your 3CX server. Go to "Settings" > "CRM Integration" Page. From the "Available CRM Integrations" panel select Office365 and press Download.
2. To assign the Office 365 plugin to an Extension, go to the extensions page from the management console. Select the extension and click Edit, then navigate to the integration tab. Enable Integration and select the Office365.zip from the list.
3. Repeat the previous step for each extension you need to be set with the Office 365 integration.

After completing these steps, and once the 3CX client is provisioned, the integration package will be received from the 3CX server and will be ready for use by the extension.

Configuring the Office 365 Plugin

1. In order to open the configuration dialog, press the Settings button in the 3CX client for Windows.
2. Select the “Advanced Settings” and then click “Integration.” The configuration dialog will be shown.
3. Click on “General” to open the general settings page.

* Here you can configure when you want to open the contact record in Office 365 (on ring, on answer, or don’t open it).
* if you only want to open the contact record if the Caller ID length is larger than a number of digits (so it’s not launched when another extension is calling you).
* If you also want to automatically register the call activity in the contact’s notes, you must check the “Enable Journaling” option. When this option is set, the plugin will add a new line containing information about the call in the contact's notes field, after the call has ended.
* If you want to create a new contact when the Caller ID is not found, just check the option.

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* If you only want to open the contact record if the Caller ID length is larger than a number of digits (so it’s not launched when another extension is calling you).
* When opening a contact record, in the Contact Lookup section you can specify if you want it opened in your default browser, or configure the plugin to open the contact record in another browser.

1. Inbound Calls

* When an inbound call arrives at your extension and a contact is matched, the contact record will be automatically shown in your selected browser.
* When the call ends, and the option “Enable Journaling” is checked, a new line containing the call details will be added to the contact's notes.
* If a contact is not matched and the option “Create new contacts if not found” is checked, a new contact will be created and shown.

1. Launching Calls from Office 365

No plugin is needed for this functionality, which works using "hotkey dialing" feature.

Once the hotkey dialing has been configured, you just need to select the phone number and press the hotkey. The number will be pasted on your 3CX client for Windows dial-pad screen and you can launch a call by just pressing the call button.

Making Calls Using Hot Keys:

It allows you to use a key or a combination of keys on a computer keyboard to control the 3CX client.

For example, you will not have to open the client in order to press the Answer button; you can answer the call just by pressing the Shift + A combination on your keyboard.

Configuring Hot Keys:

6.1) Click the “Gears” button to access “Settings.”

6.2) Click on “Hot Keys.”

6.3) By default, the Hot Keys functionality is not enabled. Click on the Hot Key you want to enable and check “Enable keyboard shortcut.”

6.4) Select the key combination that will serve as your Hot Key. You can combine Ctrl, Alt and Shift keys along with letters and numbers. Note: Letters, numbers and special function keys (insert, delete, page up, page down and others) have to be combined with Ctrl, Alt and Shift keys in order to create a Hot Key. F1 - F12 keys do not have this limitation.

Making a Call Using the “Copy numbers from clipboard” Hot Key

Open a web page, text document or any other file and highlight the number that you want to dial.

In this example we selected Shift+V to serve as the Hot Key. Press “Shift+V” and the number will be copied automatically on your client’s dial-pad screen.

Click the “Call” button to dial the number.

Making a call using the Hot Key (Mac)

Highlighting the number, you want to call.

Press Cmd + 3 on your keyboard.

The 3CX client for Mac will open and your call will be initiated once you click on the call button.