Assistant-Enterprise Toolbar
Go to http://www.vc3.com/support/Pages/VoiceAdvantage-Guides.aspx to access the toolbar download.

Assistant–Enterprise Toolbar in Internet Explorer:

Assistant–Enterprise Toolbar in Outlook:

Assistant Enterprise Toolbar

1. First Time Login

When you log in for the first time, you need to configure your connection settings as described in the following steps. Once these settings are configured, you do not need to provide them again. You can log in directly from the toolbar by clicking Login.

   a. Click Login button on the toolbar.
   b. Assistant opens the Options dialog.
   c. Click Account.
   d. To configure your account settings, enter into the provided fields, the username and password provided by your administrator for your Assistant account.
   e. Check the Save Username and Save Password options if you want to avoid being prompted for this information the next time you log in. Your password is encrypted for greater security.
      a. Username: area code + phone number + extension@voice.vc3.com (ex. 80355512122001@voice.vc3.com)
      b. Password: area code + phone number + extension (ex. 80355512122001)
   f. Click Apply.

Log In and Log Out

To log in, click Login. To log out, click Login again.
Dial Number

1. In the Dial Number box, type the number you want to call.
2. Press ENTER.

Dial from Web Page (Internet Edition)

1. On a web page, select a phone number.
2. Highlight and right-click the number.
3. On the shortcut menu, click Dial.

Dial from Email (Outlook Edition)

1. Open an email that contains the number you want to dial.
2. Make sure the email is either an open message or a preview in the HTML format.
3. Highlight and right-click the number.
4. On the shortcut menu, click Dial.

Redial Number

You can redial up to 10 previously dialed numbers.

1. Click the arrow at the right-hand side of the Dial Number box.
2. On the Dial Number list, click the number you want to redial.
3. Press ENTER.

Dial from Contacts (Outlook Edition)

Assistant–Enterprise within Outlook, allows you to dial the Business, Home, or Mobile number of any Outlook contact.

1. In the list of folders, click Contacts.
2. From the Contacts list, select the contact you want to call.
3. On the Assistant–Enterprise toolbar, click the arrow at the right-hand side of the Dial Contact list.
4. Select the type of number to call (Business, Home, or Mobile).
**Dial from Personal Directory**

1. On the Assistant–Enterprise toolbar, click **Personal Directory**.
2. On the list that appears, click the desired phone number.

**Call Notification**

When you initiate or receive a call, Assistant–Enterprise displays a notification window above the system tray, which includes the other party’s identification from BroadWorks or Outlook directories.

**Dial from Group Directory**

1. On the Assistant–Enterprise toolbar, click **Group Directory**.
2. On the list that appears, click the desired phone number.

**Answer Call**

In the toolbar, click **Answer** or click the Call Notification window.

**Dial from Speed Dial Directory**

1. On the Assistant–Enterprise toolbar, click **Speed Dial**.
2. On the list that appears, click the desired phone number.

**Blind Transfer**

Calls can be blind transferred while active, held, or ringing in.

1. Call the destination number. This automatically puts the first party on hold if the first party is not already on hold.
2. Click **Transfer**.

**Consulted Transfer**

Calls can be transferred with consultation while active, held, or ringing in on your phone.

1. Call the destination number. This puts the first party on hold.
2. Wait until the called party accepts your call, and then click **Transfer** to connect the parties.

**End Call**

You can end incoming and outgoing calls from the toolbar and from the Call Notification window.
1. Click **End** on the toolbar or click **End Call** in the **Call Notification** window.

**Save vCard**

To save the caller’s phone number and personal information as a vCard in Outlook, in the **Call Notification**, click **Add vCard**.

**Web Screen Pop**

To open a URL in your browser for an incoming call, click **Web Pop URL** in the **Call Notification** window. This opens a page in your browser window that contains information about the calling party encoded in its URL.

**Hold Call**

1. On the **Call Selector** list, select the call to hold.

   Click **Hold**.

**Unhold Call**

1. On the **Call Selector** list, select the held call.

2. Click **Answer**.

**Initiate Conference**

You can initiate a conference with a minimum of two parties. All calls on the **Call Selector** list are added to the conference.

1. Click **Conference**.

2. To add incoming or outgoing calls to the conference, click **Conference**.

3. To drop a conference participant, select the participant’s number on the **Call Selector** list and click **End**.

**Transfer Call to Voice Mail**

You can transfer calls to your voice mail from the toolbar and from the **Call Notification** window. To transfer to voice mail, click **Transfer to Voice Mail** either on the toolbar or in the **Call Notification** window.

**Retrieve Voicemail**

To listen to your voicemail:

Make sure that you are not currently engaged in a call. No entries must be present on the **Call Selector** list.

Click **Transfer to Voice Mail** on the toolbar.

**Set Your CommPilot Express Profile**

CommPilot Express allows you to manage your calls based on your schedule using four configurable profiles: **In Office**, **Out of Office**, **Busy**, and **Unavailable**. Select a profile from the **CommPilot** drop-down list on the toolbar.

To disable all profiles, select **CommPilot – None**.
Change Services Settings

The Services dialog allows you to easily change your service settings for telephony services, such as Voice Messaging, CommPilot Express profiles, Call Forwarding, and Call Waiting.

**NOTE:** You see only the services you have.

1. On the toolbar, click Services.
2. On the left-hand side of the Services window, select the tab of the service you want to configure.
3. On the right-hand side, select or fill out required information.

By clicking a button, you can set the corresponding service on or off.

Call Selector

The Call Selector is a drop-down list that shows current calls and lets you pick the call you want to perform the action on, but does not switch the call.

Login Button

The Login button, which allows you to log in and log out of Assistant–Enterprise displays the following states:

- A grey button indicates that you are not logged in.
- A green button shows that you are currently logged in.
- A disabled button shows that Assistant–Enterprise is attempting to log you in.
- A red button indicates that your last login attempt failed.

Portal Access (Internet Edition)

The Portal button allows you to access your web portal directly from Assistant–Enterprise.

Click Portal.

Options

You can configure your BroadWorks account, connection settings, and dialing rules through this dialog.

1. On the toolbar, click Options.
2. Select the option you want and provide the required information.
Directories

The following directories are available to you from the Assistant–Enterprise Toolbar:

- **Personal Directory** is your web portal personal directory integrated with Assistant–Enterprise.
- **Group Directory** integrates the group contacts, provided by your service provider.
- **Call History** allows you to view your missed calls, received calls and dialed calls.
- **Speed Dial** contains your speed dial entries.

Outlook Integration Page

Click on the **Options** tool bar.

Select **Outlook Integration**. Click the **Enable Outlook Integration** box to integrate outlook with your toolbar.

- Next, click the **Contacts** link below the **Outlook Integration** link.
- Check the box that reads **Retrieve all contacts**.