



Microsoft Outlook Integration

Introduction

3CX provides out of the box integration with Microsoft Outlook. This plugin opens the contact record in Microsoft Outlook, creates a new contact if the inbound caller is not found, and creates a journal entry for the contact when the call ends. It also provides click to call functionality by adding menus and toolbars to the Outlook contacts.

Help and Support

Help Desk

Homepage

System Requirements

- 3CX v15 - For the PBX and the STD edition download the [3CXPlugins](#). For the PRO edition you can download it within the management console.
- The 3CX app for Windows installed and running.
- Microsoft Outlook versions 2010, 2013, 2016 ONLY.

Deploying the Microsoft Outlook Integration

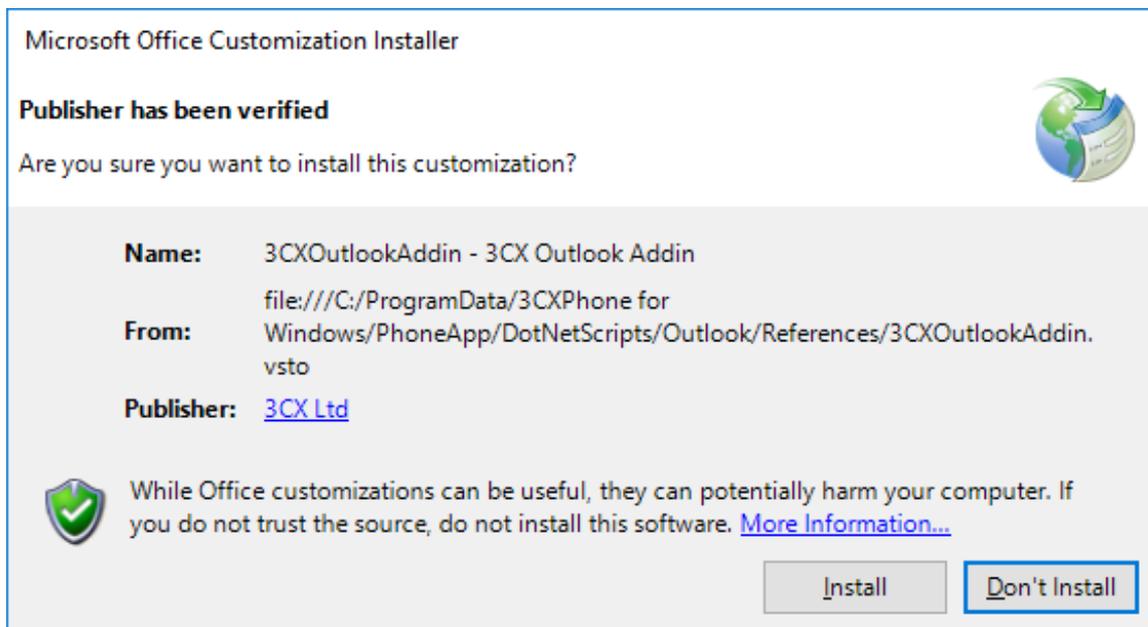
In order to deploy the Microsoft Outlook integration to your users, please follow these steps:

1. From the 3CX Management Console you need to download the plugin from the 3CX update server to your 3CX server. Go to **"Dashboard > Updates"** Page. From the Integration category select **"Outlook"** and press **"Download."**
2. To assign the Microsoft Outlook 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 Outlook.zip from the list.
3. Repeat the previous step for each extension you need to be set with Microsoft Outlook integration.

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

Installing the Microsoft Outlook add-in

During the first time the 3CX app starts and loads the plugin after provisioning, it will register an add-in to be installed in Microsoft Outlook. As a result, when you open Microsoft Outlook the first time, you will see the following dialog.



Press Install and the 3CX add-in will start running inside Microsoft Outlook.

Configuring the Microsoft Outlook Plugin

In order to open the configuration dialog, press the Settings button from the 3CX app for Windows.

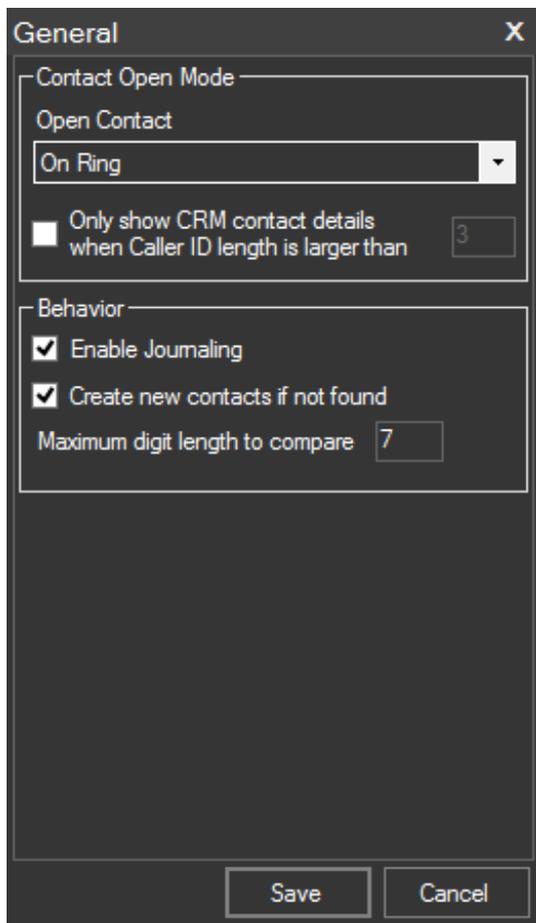


Select the “Advanced Settings” and then click “Integration.” The configuration dialog will be shown.



General configuration

Click on "**General**" to open the general settings page. Here you can configure when you want to open the contact record in Microsoft Outlook (on ring, on answer, or don't open it), and 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 journal, you must check the **"Enable Journaling"** option (only works for Microsoft Outlook 2010). When this option is set, the plugin will add a new journal entry containing information about the call after the call has ended. If you want to create a new contact when the Caller ID is not found, just check the option.

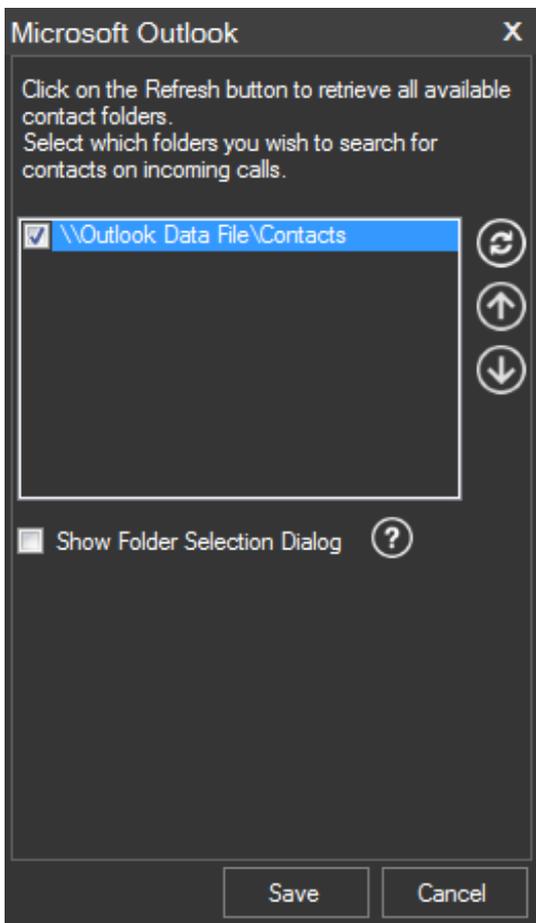
In the Behavior section you can also change the maximum digit length to compare. When an inbound call arrives at your extension, the caller ID may have different formats depending on your PSTN or VoIP Provider. It could have an international format (including the country code), national format (including the region or city code), or local format (including only the local number).

Also, you may have created your contact's phone numbers in Outlook with prefixes that are not present in the caller ID, such as mobile phone prefixes. In this case, to match the caller ID with the contact's phone number, you need to specify the maximum digit length to compare parameter. Usually this parameter should be the length of your local phone number.

The Microsoft Outlook plugin will compare the final number digits of the Caller ID with the final number digits that appear in your contact's phone number. If you configure this parameter to compare a high number of digits, there's a greater chance that the Caller ID will match up with the contact, but it's possible that the Caller ID will not always match up with a contact. If you configure the maximum digit length to compare to a lower number of digits, you get less accuracy when matching the Caller ID with your contacts.

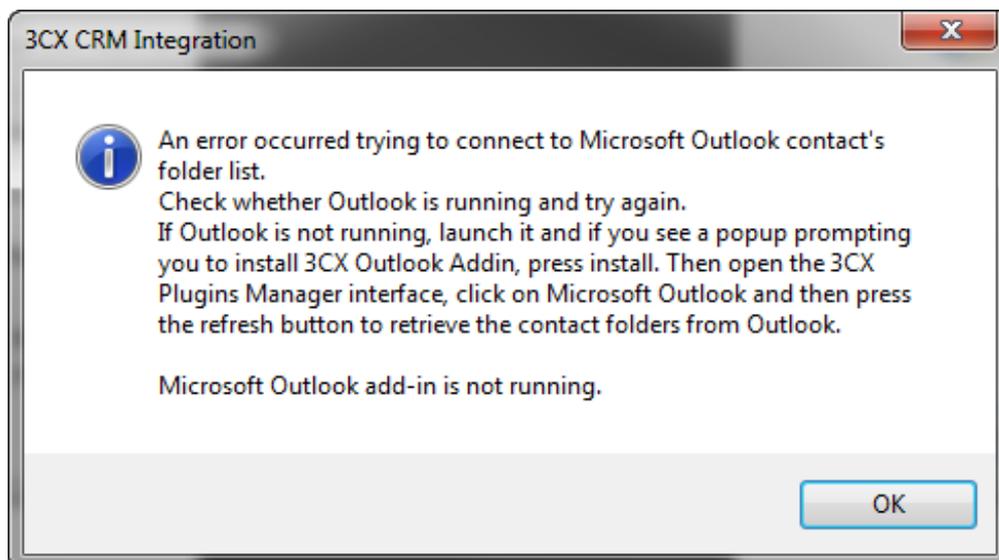
Microsoft Outlook configuration

Click on **"Microsoft Outlook"** to select which personal contact folders, or even public folders, to use for contact matching. Select as many as you want but take note that the more you select, the slower the caller ID matching will be.



Check the **“Show Folder Selection Dialog”** to enable the option to choose in which contact folder to create the contact when it’s not found.

If the add-in for Microsoft Outlook has not installed yet, or Microsoft Outlook is not running, you will see the following error message when you try to access this configuration page.



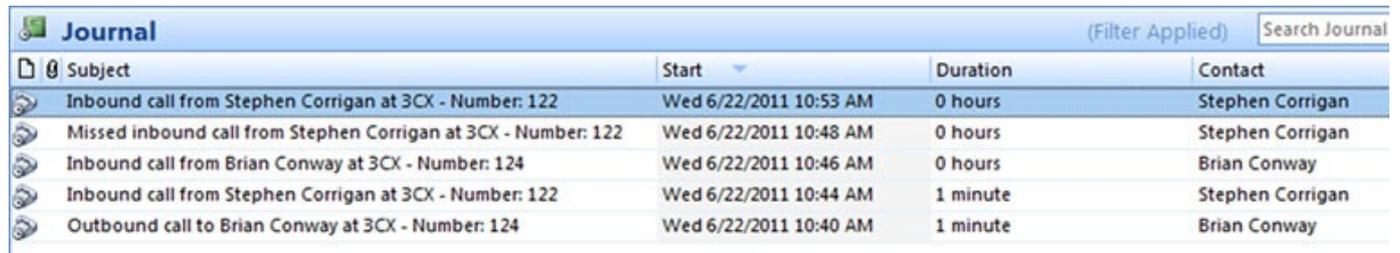
Inbound Calls

When an inbound call arrives to your extension, the contact record will be shown by Microsoft Outlook. 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 so you can update its details.

Track All Calls with Microsoft Outlook's Journal

Note: This option only works on Microsoft Outlook 2010. This feature is not available in Outlook 2013 and onwards because the journal has been deprecated in that version.

When the **“Enable Journaling”** option is checked, all inbound, outbound and missed calls will automatically be logged in Outlook's journal and shown in the activities tab for that contact.

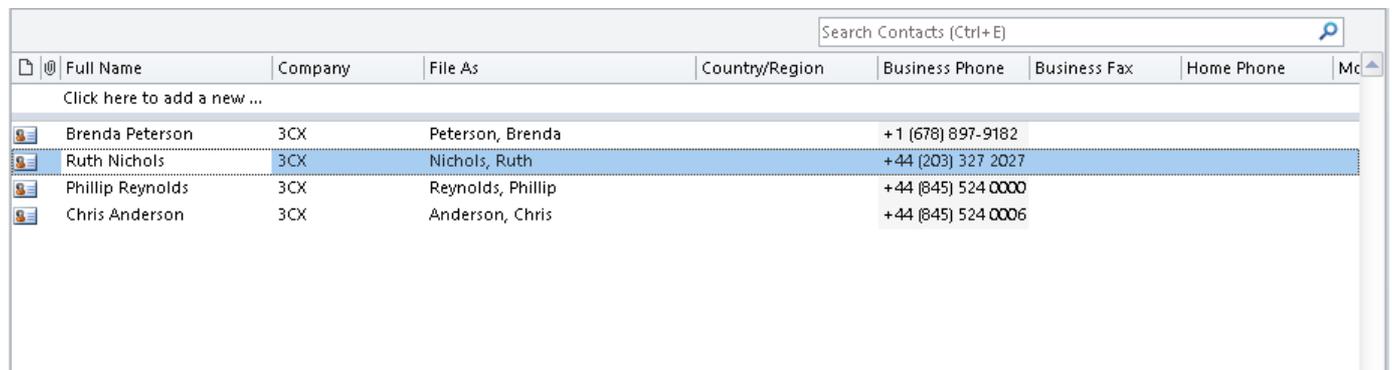


Subject	Start	Duration	Contact
Inbound call from Stephen Corrigan at 3CX - Number: 122	Wed 6/22/2011 10:53 AM	0 hours	Stephen Corrigan
Missed inbound call from Stephen Corrigan at 3CX - Number: 122	Wed 6/22/2011 10:48 AM	0 hours	Stephen Corrigan
Inbound call from Brian Conway at 3CX - Number: 124	Wed 6/22/2011 10:46 AM	0 hours	Brian Conway
Inbound call from Stephen Corrigan at 3CX - Number: 122	Wed 6/22/2011 10:44 AM	1 minute	Stephen Corrigan
Outbound call to Brian Conway at 3CX - Number: 124	Wed 6/22/2011 10:40 AM	1 minute	Brian Conway

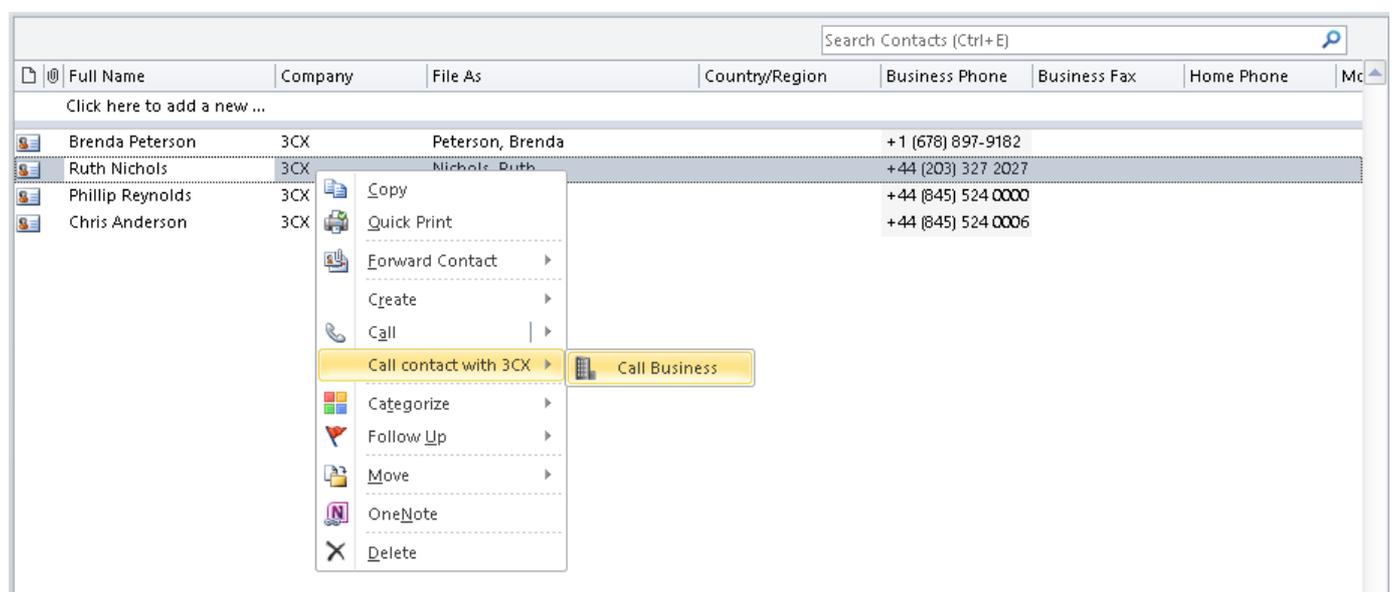
Launching Calls from Microsoft Outlook

In order to launch calls from Microsoft Outlook use the context menus and toolbar buttons added by the 3CX add-in:

1. Open your contact's section within Outlook.



1. Right click on the contact you want to call and select **“Call Contact with 3CX”**. The call will be set up directly on your phone.



Troubleshooting

Outlook Contact Folder not listed in the configuration dialog

In order to identify which Outlook folder contains contacts, the Outlook add-in needs to iterate all the folders. In most installations this is done very quickly, but in some big installations, and specially when Exchange is involved, this may result in a heavy task, raising the CPU usage and turning Outlook unresponsive. Also, in most cases, the contacts folders are located in the first level of the folder tree, and therefore it makes no sense to look for contact folders deeper. Because of this, the Outlook add-in looks for contacts folders only in the first level by default. But if you have contacts folders in a deeper location, they will not be detected by the Outlook add-in, and as a result they will not be listed in the configuration dialog.

This behavior can be changed by editing the configuration file "%AppData%\3CXPhone for Windows\3CXCRMUser.ini", and setting the value of the following parameter:

```
[Microsoft Outlook Add-in]
```

```
ContactFolderLookupMaxDeepLevel=1
```

For example, if you have 2 contact folders:

```
\Exchange\FolderA\FolderA1\FolderA11
```

```
\Exchange\FolderB
```

And `ContactFolderLookupMaxDeepLevel=1` (default value if not set), the configuration dialog will only show:

```
\Exchange\FolderB
```

But if you set `ContactFolderLookupMaxDeepLevel=3`, both folders will be shown.

You should keep that parameter as small as possible, because larger values will cause a larger iteration, and possibly turn Outlook unresponsive for a while. But if your desired contact folder is not being shown, you can increase the value of this parameter to solve the issue.

<https://www.3cx.com/docs/microsoft-outlook/>