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See Change Log for summary of changes.

GENESYS

Microsoft Outlook Contact Configuration for Fax Recipients

Technical Reference

Abstract

This document contains instructions for enabling public Outlook contacts to appear as Fax Viewer recipients.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

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Introduction

You can configure Outlook contacts through Interaction Administrator so they appear in an address book in Interaction Fax where users can select them as fax recipients.

Administrators can use this feature to configure a public Outlook Contacts folder available to all users. In addition, users can select their private Outlook contacts from their local computers as fax recipients.

- Configuring a Public Outlook Contacts Folder
- Configuring a Private Outlook Contacts Folder
- Selecting an Outlook Contact as a Fax Recipient

Configuring a Public Outlook Contacts Folder

System administrators should follow these steps to configure a public Outlook Contacts folder to appear in Interaction Fax:

- 1. On the Outlook File menu, select File > New > Folder.
- The Create a New Folder dialog box displays.
- 2. In the Create New Folder dialog box, enter the name Contacts.
- 3. In the Folder contains drop-down menu, select Contact Items.
- 4. Use the Select where to place the folder scroll bar to locate and select All Public Folders and then click OK.



Note:

The **Name** of the new folder does not have to be **Contacts**, but if you want to use a different name, you need to add that folder name to the Outlook IC Data Source in Interaction Administrator.

5. Once the Contacts folder is created under Public Folders, create a new contact and save it.

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Note:

Contacts must have a fax number to display in Interaction Fax.

6. In the IC Data Sources container in Interaction Administrator, create an IC data source using the following information:

Name	Outlook Contacts or whatever name you choose to use.
Туре	MAPI
Subtype	Outlook
Folder	Contacts
	Note: The Folder name is case sensitive.

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Fax Contac Sources Contac Data Manager Web Services Web Services		Add	ional Information:		
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7. In the **Contact List Sources** container, create the contact list source that you will select in the Interaction Fax Address Book. Use the following information:

IC Data Source	Name given for IC Data Source in a previous step in this procedure.
Label	Any name you want
Driver	IC Outlook Contacts

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	Contact List Source Contact List Source Diffect Rup Diffecter Public Rup Contacts Could Contacts Contacts Octoortacts Outflook Contacts	13Text Rwp wp 13Tracker Private p 13Tracker Public R IX Private Contac Contact List Source C	hep Is onfiguration - Outlook Con s Multi-Language Support (Outlook Contacts Outlook Contacts IC Outlook Contacts Class Notes Class Notes	Custom Attributes History	NAS

The public folder configuration is now complete. To test the configuration, see Selecting an Outlook Contact as a Fax Recipient.

Configuring a Private Outlook Contacts Folder

Users do not need to perform any configuration steps to access their private Outlook contacts in Interaction Fax. Users add their private contacts in Outlook then select the **Private Outlook Contacts** address list in Interaction Fax.

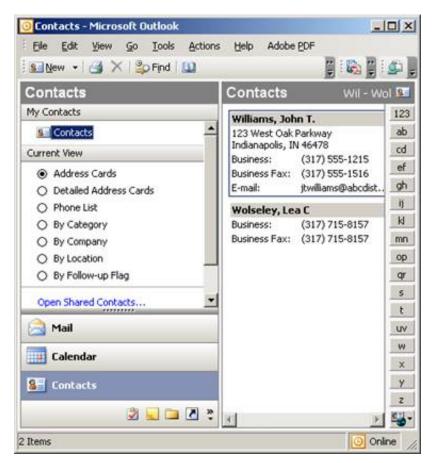
Add or View your Private Contacts in Outlook:

- 1. In Outlook, select the Contacts tab.
- 2. On My Contacts, click the Contacts folder.

The Contacts folder displays your private Outlook contacts.

Add additional contacts

1. Right-click on the Contacts list and select New Contact.



2. See the next section to select from your list of Outlook contacts in Interaction Fax.

Selecting an Outlook Contact as a Fax Recipient

Once the appropriate configuration has been completed, users can access their Outlook contacts as fax recipients in Interaction Fax.

- 1. Click on Start > All Programs > PureConnect > Interaction Fax.
- The Interaction Fax window displays.
- 2. Do one of the following:
- On the Main toolbar, click the New Fax icon.
- To open an existing fax, click the **Open Fax** icon.
- On the Annotation toolbar, select the Rectangle, Line, Freehand, Text, Stamp, or Date Stamp tools to create the fax.

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New Fax Open Fax Save Fax Send Fax Print Zoom In Zoom Out Rotate Left Rotate Right Invent	
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• On the Main toolbar, click the Send Fax icon.

The Send Fax dialog box displays.

• In the Send Fax dialog box, click the indicated area (blue arrow) to display the list of address books.

Fax Number: Name: Company: Phone:	-		
Company:			
Phone:			
	1		
		Add	Remove
Click here to add recipients from an address book			0
Click here to add recipients from an address book			
Cover Page:			
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• Select the **Outlook Private Contacts** address book to access your Outlook contacts from your local computer, or select the public **Outlook Contacts** folder that contains the list of contacts accessible to all users.

Fax Number:		•	
Name:			
Company:			
Phone:			
		Add	Remove
lick here to hide the addres	te book	A	
sarch:		Show Contacts	From:
	_	Outlook Private	Contacts
Display Name	Fax	Company	Business Phone
Villiams, John T.	1 (317) 555-1	1516 ABC Distribution	1 (317) 555-1215

Remember that only the contacts with fax numbers appear in the address book.

Change Log

Date	Changes
09-January-2012	Updated Copyright and Trademark Information page.
01-August-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to company Product Information site URLs, and copyright and trademark information.
25-June-2015	 Rebranding changes, new logo and font colors. Updated Copyright and Trademark Information page.
29-July-2015	IC-131357 Checked for final Rebranding changes.
18-January-2018	Rebranded this document to apply Genesys lexicon.
06-February-2018	Converted to HTML.
08-May-2019	Reorganized content. Adding links. See <u>CICDOC-182</u> .