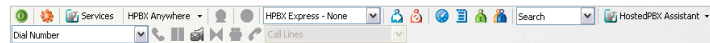




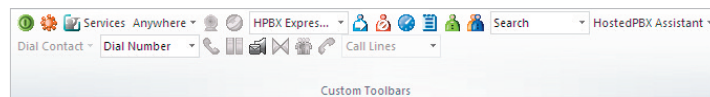
Primus Hosted PBX Assistant Toolbar Reference Guide

To Download the Hosted PBX Assistant Toolbar, visit www.primus.ca/hpbxguide or select Help from the Hosted PBX Portal and locate the Hosted PBX Assistant Toolbar Download link.

Hosted PBX Assistant Toolbar in Internet Explorer or Firefox:



Hosted PBX Assistant Toolbar in Outlook:



Log in and Log out

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

Change Password

1. Changing your password is controlled via the Hosted PBX Portal at www.voice.primus.ca.
2. Once you've changed your Hosted PBX Portal password you will be prompted to re-enter it in the Hosted PBX Assistant Toolbar.

Dial Number

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

Redial Number

You can redial up to 10 previously dialed numbers.

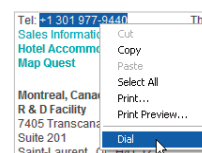
1. Click the arrow at the right-hand side of the Dial Number box.



2. On the Dial Number list, click the number you want to redial.
3. Press ENTER.

Dial from Web Page (Internet Edition)

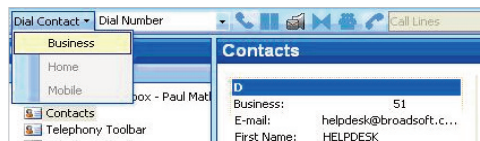
1. On a web page, select a phone number.
2. Highlight and right-click the number.
3. On the shortcut menu, click Dial.




Dial from Contacts (Outlook Edition)

Hosted PBX Assistant Toolbar 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 Hosted PBX Assistant 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 Hosted PBX Assistant Toolbar, click Personal Directory .
2. On the list that appears, click the desired phone number.


Dial from Group Directory

1. On the Hosted PBX Assistant Toolbar, click Group Directory .
2. On the list that appears, click the desired phone number.

Dial from Speed Dial Directory

1. On the Hosted PBX Assistant Toolbar, click Speed Dial .
2. On the list that appears, click the desired phone number.

Dial from Call History

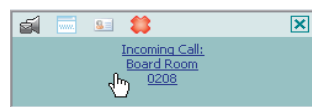
1. On the Hosted PBX Assistant Toolbar, click Call History .
2. On the list that appears, click the desired phone number.

Dial from Search

1. In the Search box, type your search criteria or click the arrow at the right-hand side of the Search box and select a previous search from the list.
2. Press ENTER. Hosted PBX Assistant displays the results of your search.
3. Click the phone number you want to dial.

Call Notification

When you initiate or receive a call, Hosted PBX Assistant displays a notification window above the system tray, which includes the other party's identification from Hosted PBX or Outlook directories.




Answer Call

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


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.

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.
2. 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 and a maximum of 31 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.

Check for New Voicemail

To verify whether you have new voicemail, check the color of the envelope icon on the Dial Voice Mail button. If you have new voicemail, the color changes from grey to yellow .

Retrieve Voice Mail

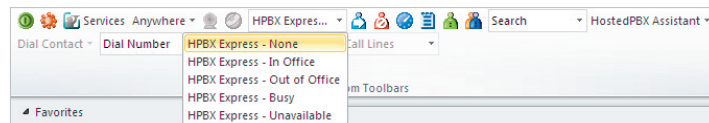
To listen to your voice mail:

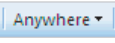
1. Make sure that you are not currently engaged in a call. No entries must be present on the Call Selector list.
2. Click Transfer to Voice Mail  on the toolbar.

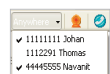
Set Your Hosted PBX Express Profile

Hosted PBX Express allows you to manage your calls based on your schedule using four configurable profiles: In Office, Out of Office, Busy, and Unavailable.

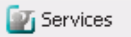
1. Select a profile from the HPBX Express drop-down list on the toolbar.
2. To disable

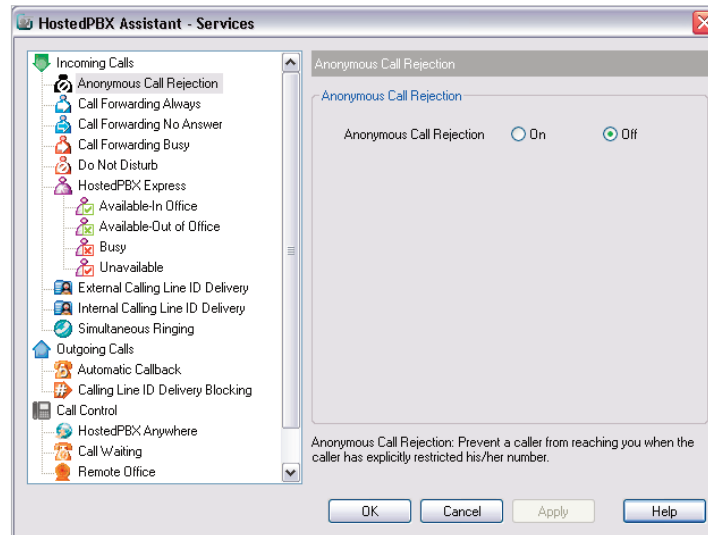


From the Anywhere drop-down list , select the Anywhere location you want to enable or disable. An enabled location has a check mark beside it.









NOTE: You see only the services you have.

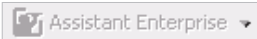
1. On the toolbar, click Services .
2. On the left-hand side of the Services window, select the tab of the service you want to configure.
3. On the right-hand side, select or fill out required information.




Access Services Settings

Frequently used services are represented on the toolbar by their own buttons for easy access: Call Forwarding Always , Call Forwarding No Answer , Call Forwarding Busy , Do Not Disturb , Remote Office , and Simultaneous Ringing . By clicking a button, you can set the corresponding service on or off.


Links

The Hosted PBX Assistant links list  contains URLs preconfigured by your service provider. Select an item from the list to navigate to that page.

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 Hosted PBX Assistant 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 Hosted PBX Assistant 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 Hosted PBX Assistant.

Click Portal  .





Options

You can configure your Hosted PBX 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 Hosted PBX Assistant Toolbar:

- Personal Directory  is your web portal personal directory integrated with Hosted PBX Assistant.
- 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.

Visit [primus.ca/business](https://www.primus.ca/business) or call **1-888-502-8380** to learn more.