

Microsoft Outlook Integration Guide

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Microsoft Outlook Integration Overview

Linkus Desktop Client supports to integrate with Outlook for Windows, which allows you to make phone calls to your Outlook contacts right from Outlook through Linkus Desktop Client. This topic describes the requirements and key features of Microsoft Outlook integration.



Important:

Linkus macOS Desktop does NOT support integration with Microsoft Outlook.

Requirements

Microsoft Outlook

- Client: Outlook for Windows
- Version: Outlook 2016 or later
- Operating System: Windows 10, Windows 11

Yeastar PBX

Contact administrator to ensure that the plan of your organization's PBX is Enterprise Plan (EP) or Ultimate Plan (UP).

Key features

The integration of Linkus Desktop Client and Outlook provides the following key features:

Make Calls in Outlook

Launch phone calls to your Outlook contacts directly from Outlook through Linkus Desktop Client.

Call Popup

Automatically bring up the contact's profile on Outlook when you receive an inbound call from an Outlook contact through Linkus Desktop Client.

Call Journal

All the call activities get logged automatically to Outlook when you end calls with Outlook contacts through Linkus Desktop Client.

Automatic Contact Creation

Automatically pop up the contact creation page on Outlook when you receive or make calls with an unknown number that doesn't match an Outlook contact.

Related information

[Integrate Linkus Desktop Client with Outlook for Windows](#)

[Use Microsoft Outlook Integration](#)

[Disable Microsoft Outlook Integration](#)

Integrate Linkus Desktop Client with Outlook for Windows

This topic describes how to integrate Linkus Desktop Client with Outlook for Windows.

Important:

Linkus macOS Desktop does NOT support integration with Microsoft Outlook.

Requirements

Microsoft Outlook

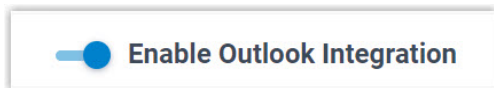
- Client: Outlook for Windows
- Version: Outlook 2016 or later
- Operating System: Windows 10, Windows 11

Yeastar PBX

Contact administrator to ensure that the plan of your organization's PBX is Enterprise Plan (EP) or Ultimate Plan (UP).

Step 1. Set up Outlook integration on Linkus Desktop Client

1. Log in to Linkus Desktop Client, go to Preferences > Outlook Integration.
2. Turn on the switch of Enable Outlook Integration.



3. Set up automatic contact creation and call logs synchronization as needed.

Feature	Instruction
Automatic Contact Creation	<p>With automatic contact creation set up, Outlook will automatically pop up the contact creation page when you receive or make calls with an unknown number that doesn't match an Outlook contact.</p> <ol style="list-style-type: none">a. Select the checkbox of Create New Contacts Automatically.b. In the Call Types to Auto-create Contacts drop-down list, select when will Outlook pop up the contact creation page.<ul style="list-style-type: none">• Inbound: Inbound call from an unknown number that doesn't match an Outlook contact.

Feature	Instruction
	<ul style="list-style-type: none"> • Outbound: Outbound call to an unknown number that doesn't match an Outlook contact.
Call Logs Synchronization	<p>With call logs synchronization enabled, all the call histories with your Outlook contacts will be synchronized to Outlook.</p> <p>To enable call log synchronization, select the checkbox of Synchronize Call Logs Automatically.</p>

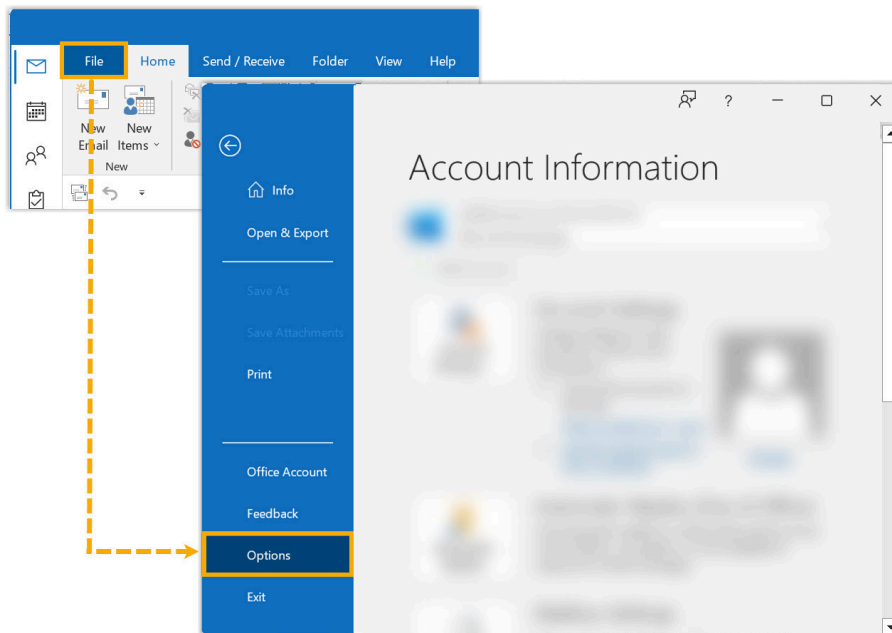
**Note:**

The Authorize button is used to authorize Linkus Desktop Client to make calls from Outlook. You do NOT need to authorize it now, as it is only required when you initiate calls in Outlook.

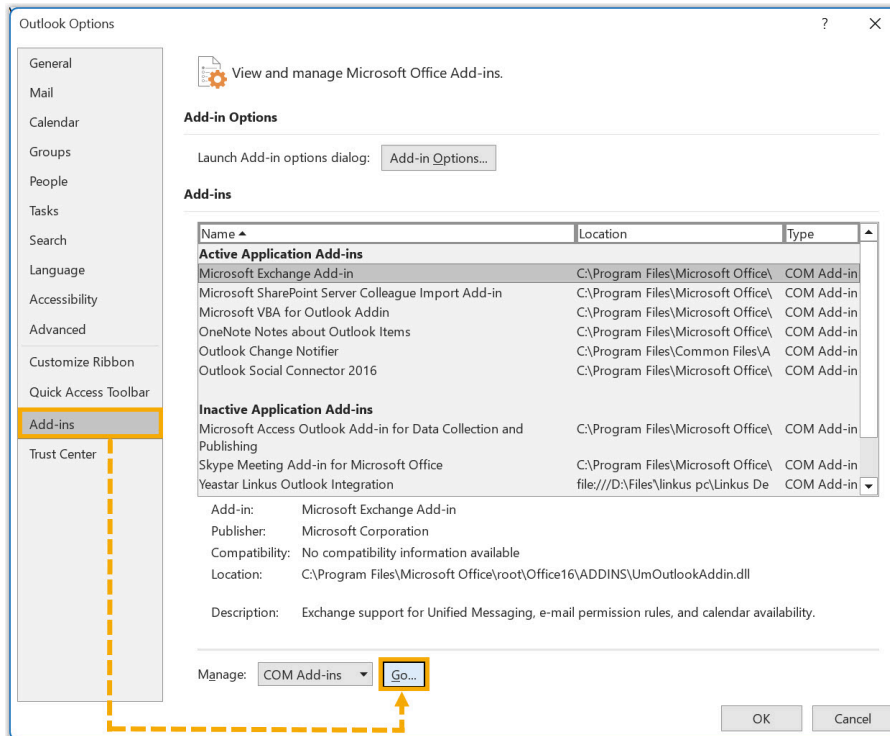
4. Click Save.

Step 2. Activate Linkus add-in on Outlook

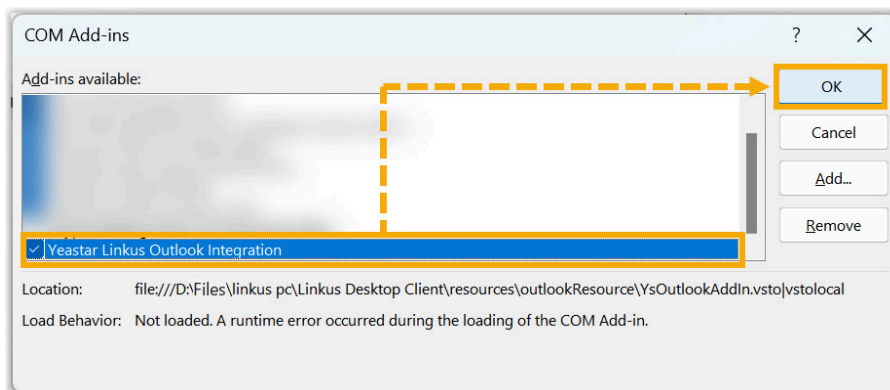
1. Open or restart Outlook, go to File > Options.



2. In the pop-up window, click Add-ins and click Go....



3. In the pop-up window, select the checkbox of Yeastar Linkus Outlook Integration and click OK.



4. In the pop-up window, click Install.

Result

- The integration of Linkus Desktop Client and Outlook for Windows is set up.
- You can [make phone calls and utilize call features within Outlook](#).

Use Microsoft Outlook Integration

This topic shows the usage of the key features that can be achieved after integrating Linkus Desktop Client with Outlook for Windows.

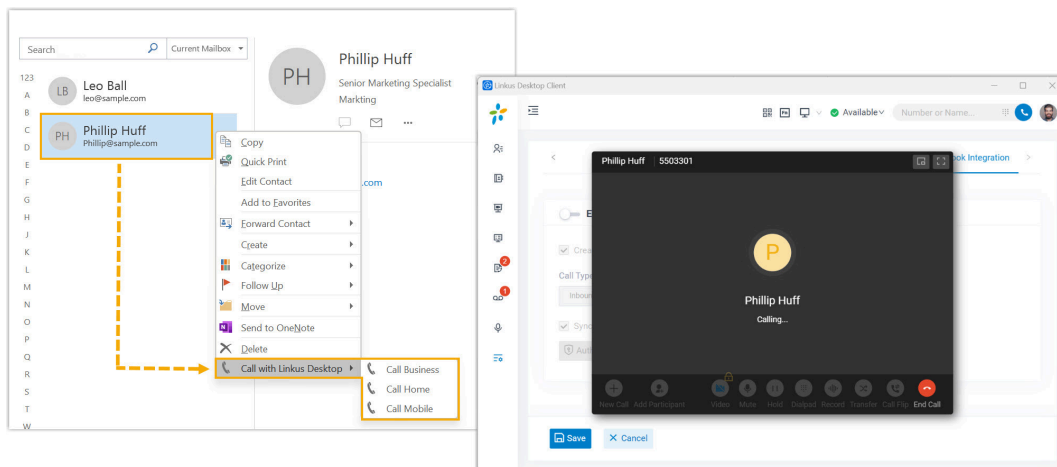
Make calls in Outlook

Prerequisites

Linkus Desktop Client stays logged in.

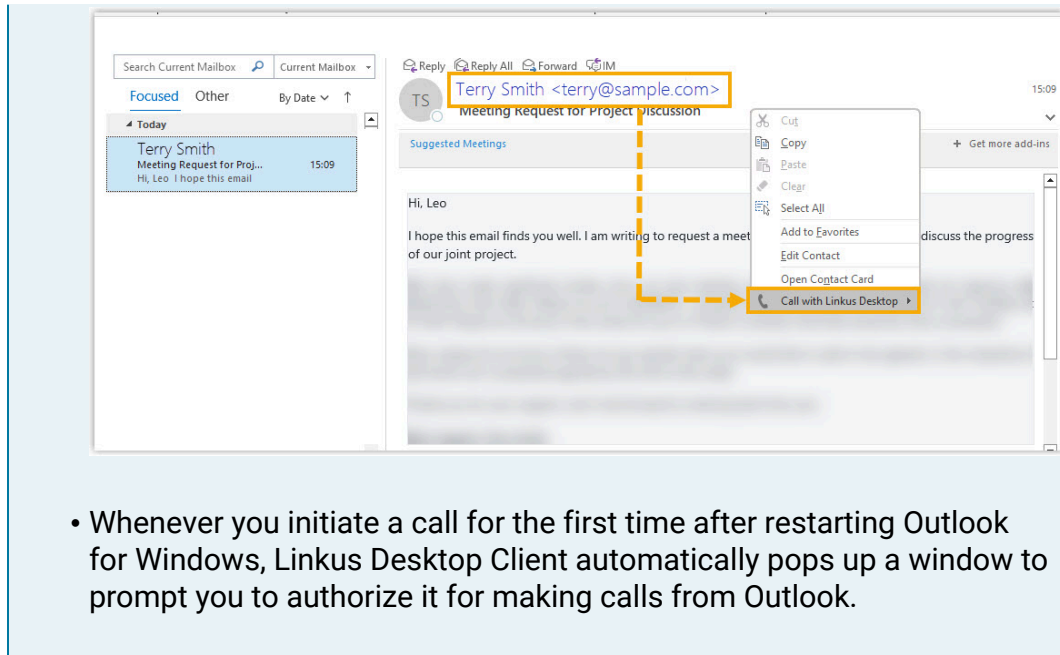
Procedure

On your Outlook contact list, right click a contact and select Call with Linkus Desktop, then decide which number you want to call. Linkus Desktop Client will automatically pop up and initiate the call.



Note:

- You can also make calls to your Outlook contacts by right clicking the recipient or sender in an email.



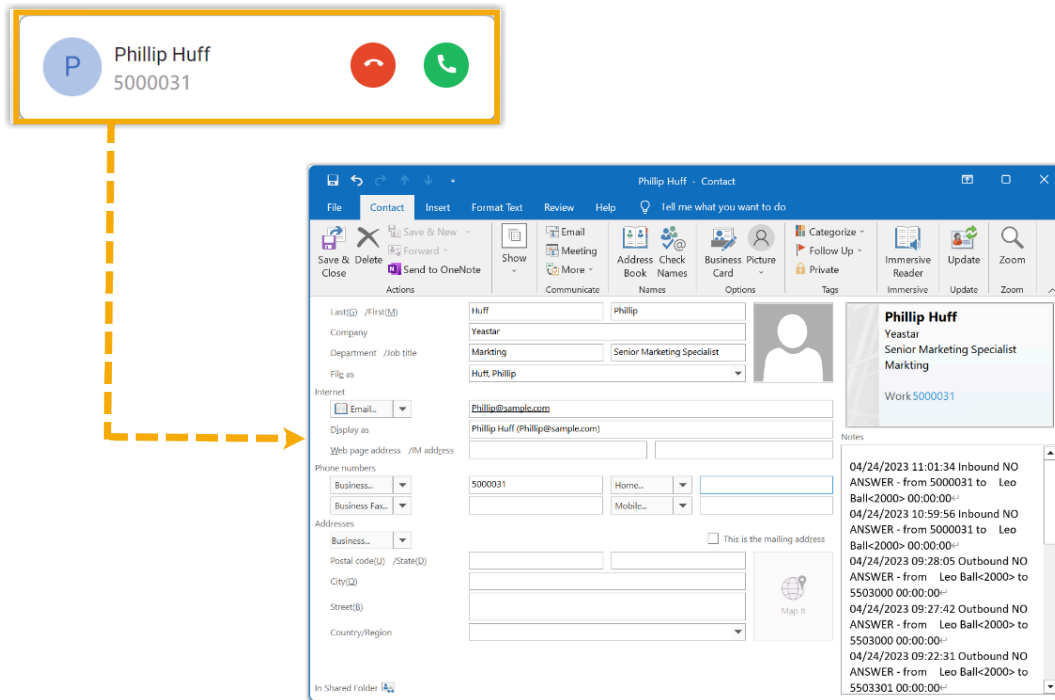
Call Popup

Prerequisites

Outlook for Windows stays logged in.

Procedure

When you receive an inbound call from an Outlook contact, Outlook will pop up to show the contact's information.



Troubleshooting:

Linkus Desktop Client does NOT display the caller's name?

If the Linkus Desktop Client only displays the phone number when receiving calls from your Outlook contacts, you need to contact the system administrator to synchronize your Outlook contacts to Linkus clients.

Call Journal

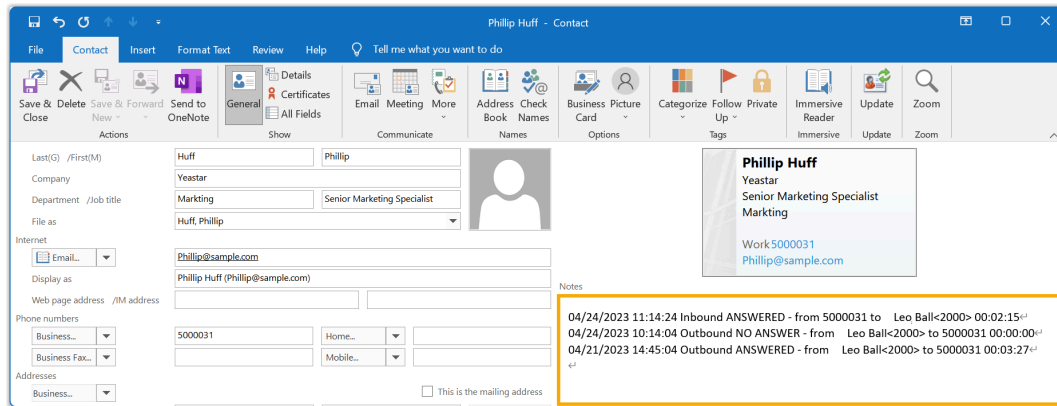
Prerequisites

- Outlook for Windows stays logged in.
- You have [enabled call logs synchronization](#).

Procedure

All outbound calls, inbound calls, and missed call histories with your Outlook contacts will be logged to Outlook automatically, which helps you to keep track of every conversation.

You can log in to Outlook, go to the Notes section in a contact editing page to view the call logs.



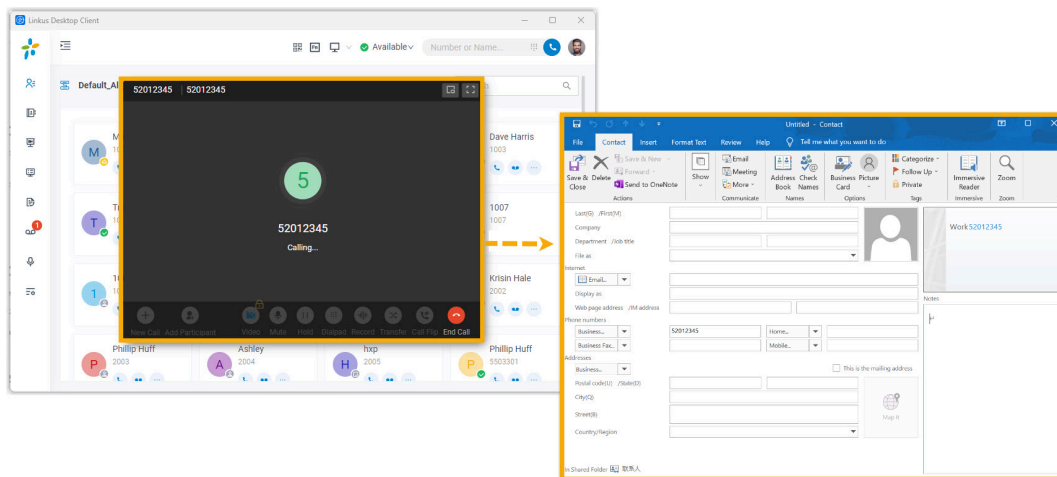
Automatic Contact Creation

Prerequisites

- Outlook for Windows stays logged in.
- You have [set up automatic contact creation](#).

Procedure

When you receive or make calls with an unknown number that doesn't match an Outlook contact, Outlook automatically brings up the contact creation page and logs the phone number. You can update other details and save it as your Outlook contact.

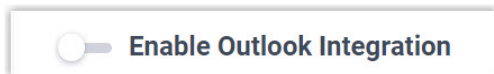


Disable Microsoft Outlook Integration

This topic describes how to disable the integration of Linkus Desktop Client and Outlook for Windows.

Step 1. Disable Outlook integration on Linkus Desktop Client

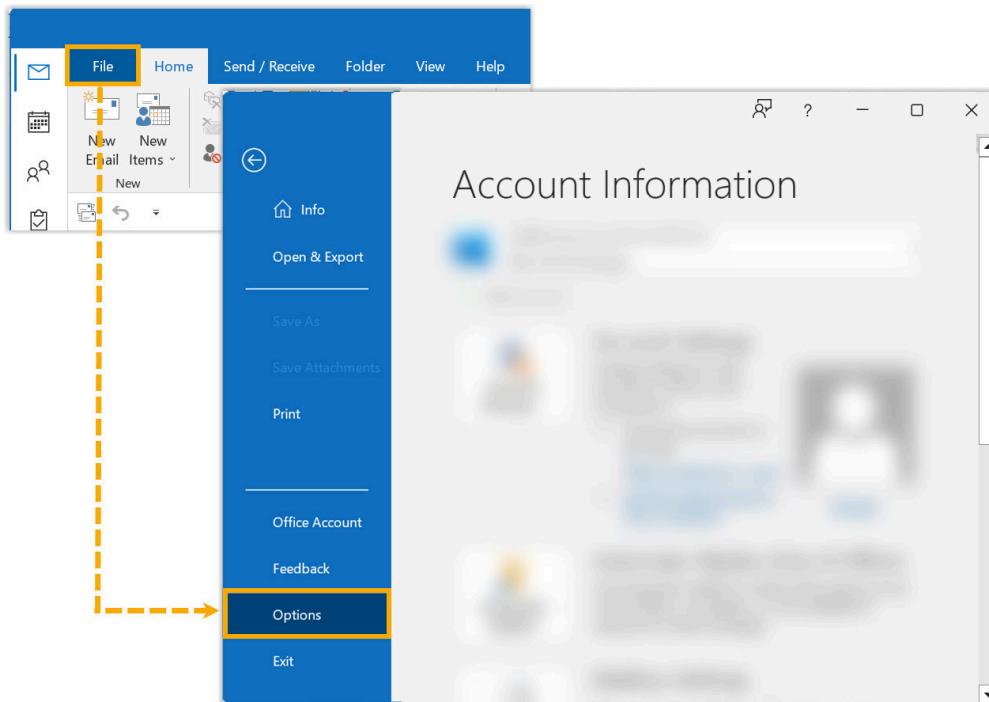
1. Log in to Linkus Desktop Client, go to Preferences > Outlook Integration.
2. Turn off the switch of Enable Outlook Integration.



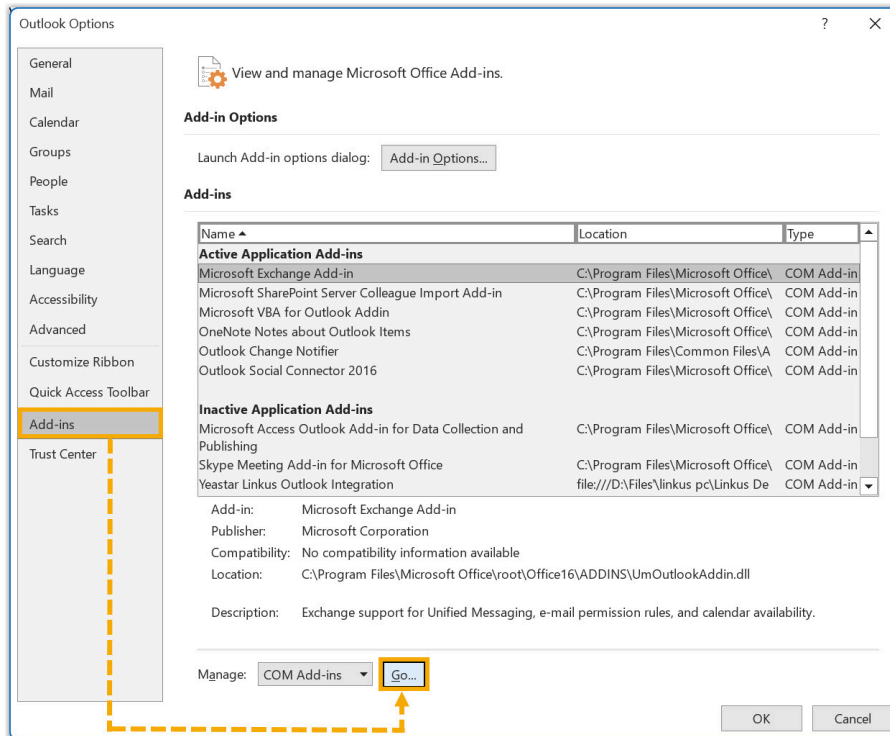
3. Click Save.

Step 2. Inactivate Linkus add-in on Outlook

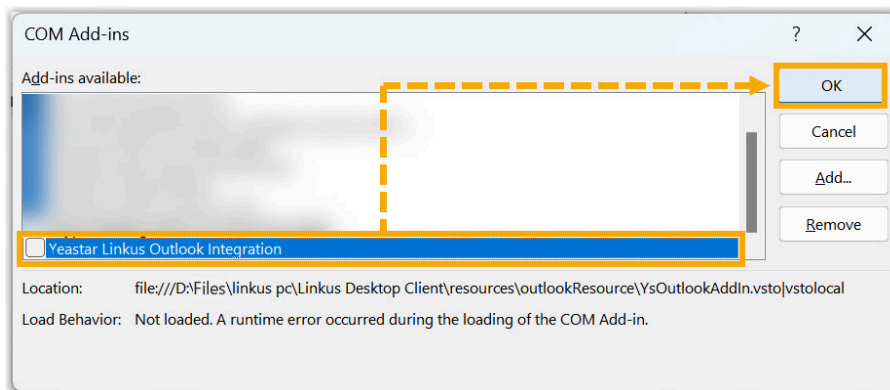
1. Log in to Outlook, go to File > Options.



2. In the pop-up window, click Add-ins and click Go....



3. In the pop-up window, unselect the checkbox of Yeastar Linkus Outlook Integration and click OK.



Result

The integration of Linkus Desktop Client and Outlook is disabled, along with all the features provided by the Outlook integration.