



CRM Connect User Guide

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Frontmatter information

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Acknowledgements

The content herein is based on the following document provided to Cloud Direct as a service provider and reseller of this product:

- CRM Connect, User Guide, Revision 1, 2012, ©Wavenet.

The original document remains untouched, with the following exceptions which have been made to ensure a positive experience for customers of Cloud Direct:

- Where appropriate, contact details and web links amended to reflect Cloud Direct.

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Technical support. Setup & usage advice. Password resets. 24/7 support for emergencies.	Select option 3	Technical Support	support@clouddirect.net



Wavenet Hosted Voice

CRM Connect

User Guide

Revision 1

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User Guide

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1 Introduction

1.1 Overview

CRM Connect is an Application for Windows Desktop that integrates leading CRM Applications into Wavenet Communications Services. CRM Connect works in conjunction with a User's phone and CRM software to provide a productivity enhancing integrated service. This document details how to install and begin using CRM Connect.

1.2 Audience

This document is intended for Administrators and End Users who will install and use CRM Connect.

2 Requirements

In order to successfully install and use CRM Connect, the following installation and licensing requirements should be met:

2.1 Hardware and Software Requirements

Minimum Requirements & Installation Information:

- 1 GHz Pentium-class processor
- 1 GB Memory
- 500MB free hard drive space
- Operating System:
 - Windows XP Professional SP3 (Not Recommended and Unsupported)
 - Windows Server 2003 and 2008 (Not Recommended and Unsupported)
 - Windows Vista (Not Recommended and Unsupported)
 - Windows 7 (Recommended and Supported)
 - 32 bit and 64 bit versions
- SVGA display
- Keyboard and mouse
- Network adapter connected to a TCP/IP network
- IBM-PC or 100% compatible

CRM Applications & Version Information:

Application Name	Version
Act! By Sage	2008 - 2011
FrontRange GoldMine	5.5 - 8.5
Lotus Notes	7 - 8.5
Maximizer	9 - 11
MS Access	2000 - 2010
MS Dynamics CRM	3 - 4
MS Dynamics NAV	4 - 5
MS Outlook *	2000 - 2010
NetSuite	
Sage 50 Accounts (Line 50)	2008 - 2010
Sage CRM	
Salesforce CRM	Enterprise
Sugar CRM	5.0 - 6.0
SuperOffice	6.1 - 6.3
vTiger	
Zoho	

* MS Outlook 64-bit is not supported

The following third-party software is also installed during the CRM Connect installation:

- Microsoft .Net 2.0

Local admin rights are required to carry out the installation so you must use a Windows user account with administrator-level access.

Some anti-virus software can cause problems when installing other software so consider temporarily disabling your anti-virus application for the duration of this installation; remember to enable it again as soon as the installation is complete.

2.2 Licensing Requirements

End users must have the CRM Connect Add-On assigned to their service in order to use the application.

The CRM Connect User Feature Package Add-On must be in your Service Offering to be available to provision.

Please note that existing customers subscribed to your Service before the availability of CRM Connect will need to be re-subscribed in the SPA and the Site(s) resubmitted in the SPA before the Add-On is available to the Customer.

If CRM Connect is not in your Service Offering and you wish for it to be added please contact Account Management.

See below for details on how to assign the CRM Connect Add-On to Users.

2.3 Network and Firewall Requirements

Protocol	Destination	Destination Port
HTTPS	ccusage.yourservices.co.uk 85.119.59.2	TCP 443
Proprietary	applications.yourservices.co.uk 85.119.62.3 85.119.62.4	TCP 2208

In addition to the above you may need to allow communication between the CRM Connect client and the CRM server(s), but the communication details vary from installation to installation; ask your system administrator for these details if you need them.

3 Download and Installation

3.1 Download

The current version of the CRM Connect installation can be found on the **Support Centre under Downloads >> Applications >> CRM Connect.**

It is also available from <http://downloads.yourservices.co.uk/CRMConnect.exe> using the username downloads and the password myapps.

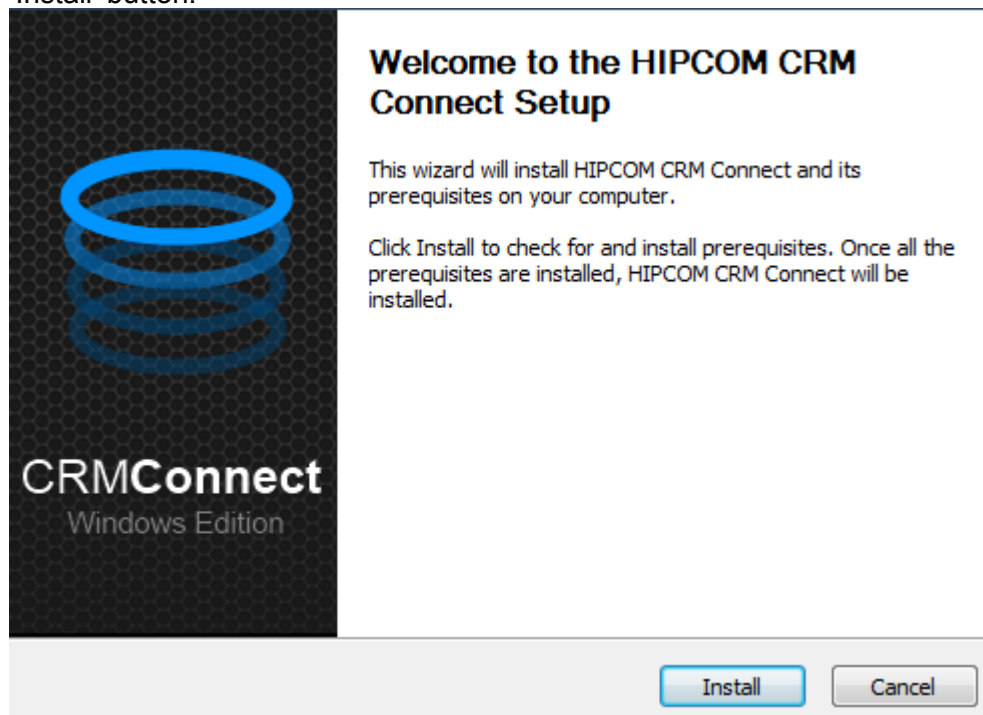
It is advisable that you keep up to date with new version downloads and host the installation packages yourselves on your own website for your customers.

Download and save the installation package CRMConnect.exe

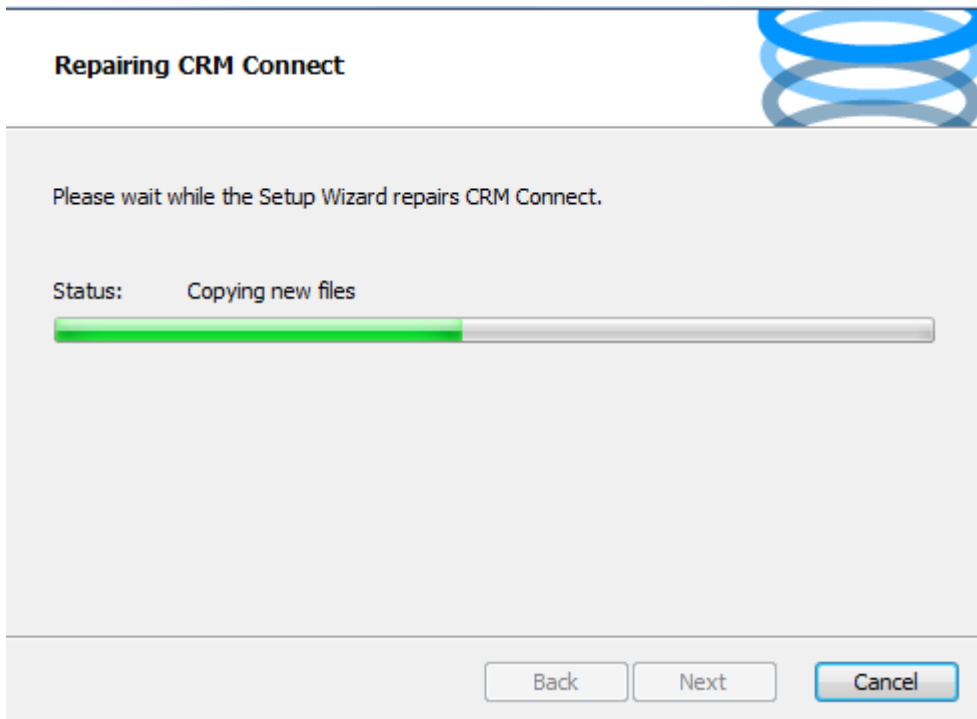
3.2 Installation

Log in to an administrator-level user account on the Windows workstation that CRM Connect needs to be installed onto.

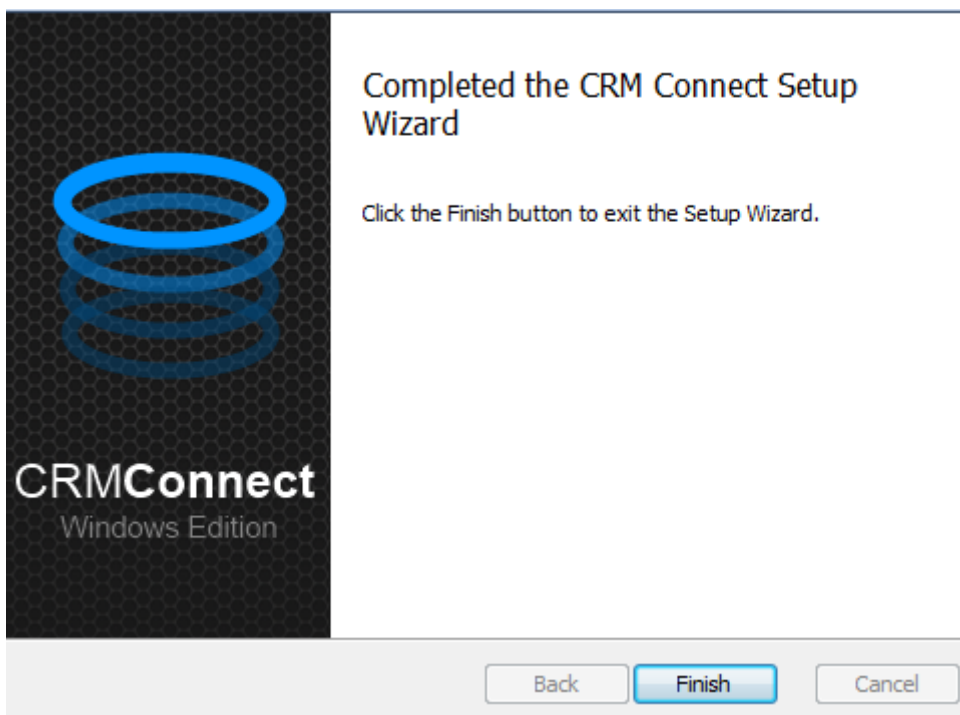
To begin installing CRM Connect, double-click the 'CRMConnect.exe' file and click the 'Install' button.



The installation will proceed and any third-party software that is required will also be installed at this time; follow any onscreen instructions displayed by the third-party software.

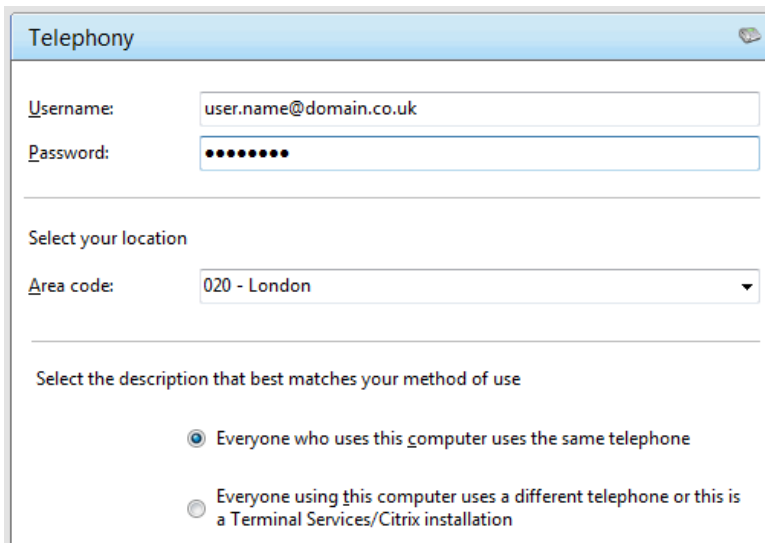


Once CRM Connect and any third-party software have finished installing, click the 'Finish' button to close the installer.



4 Initial Configuration and Username and Password Management

4.1 Initial Configuration



Telephony

Username: user.name@domain.co.uk

Password:

Select your location

Area code: 020 - London

Select the description that best matches your method of use

Everyone who uses this computer uses the same telephone

Everyone using this computer uses a different telephone or this is a Terminal Services/Citrix installation

Once the installation has finished, CRM Connect presents you with the 'Telephony' configuration screen where you need to provide your CRM Connect user account information.

The Username and Password is the User's Application Username and Password.

Enter the username and password into the appropriate text boxes.

Select your local area code from the 'Area code' dropdown box.

Select the most appropriate option based on your method of use.

Click the 'Save' button to store your settings and close the window.

If you disabled anti-virus/security software before starting the installation, enable it again now.

4.2 Username and Password Management

Users must login to CRM Connect with their Application Username and Password. This may be included in the User's Welcome Email.

Passwords are used for CRM Connect login; please follow standards for Password Protection Policies.

The Application Username always takes the format:

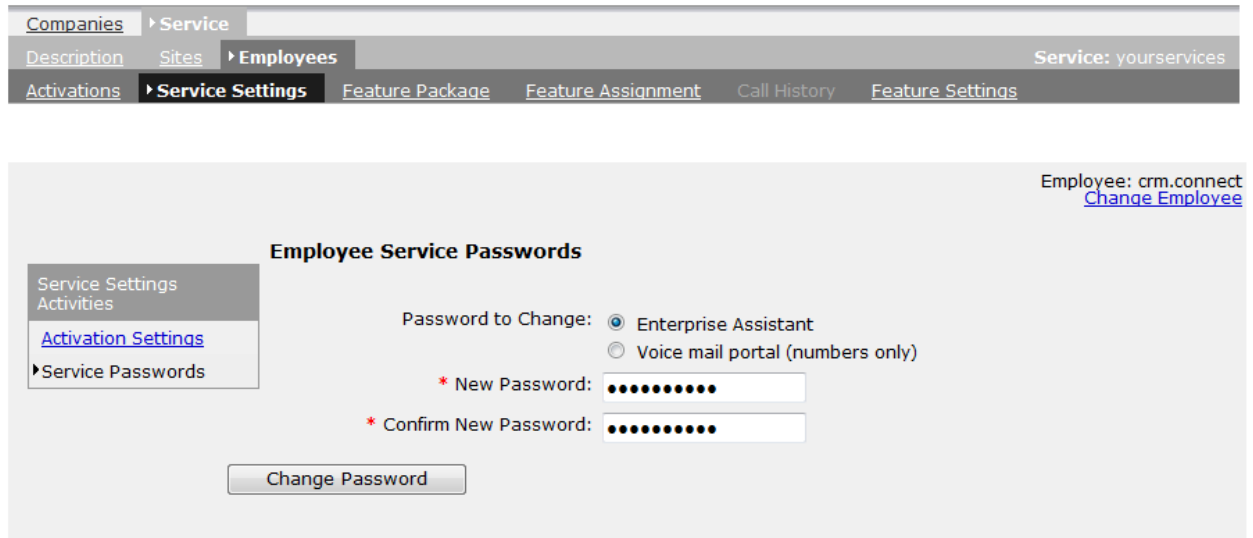
<username>@<domain>

or example, user.one@acme.co.uk

The Application Password can be set/changed via the Business Portal as follows:

To do this navigate to a User's Services in the Business Portal by clicking on Service >> Employees >> Service Settings >> Service Passwords.

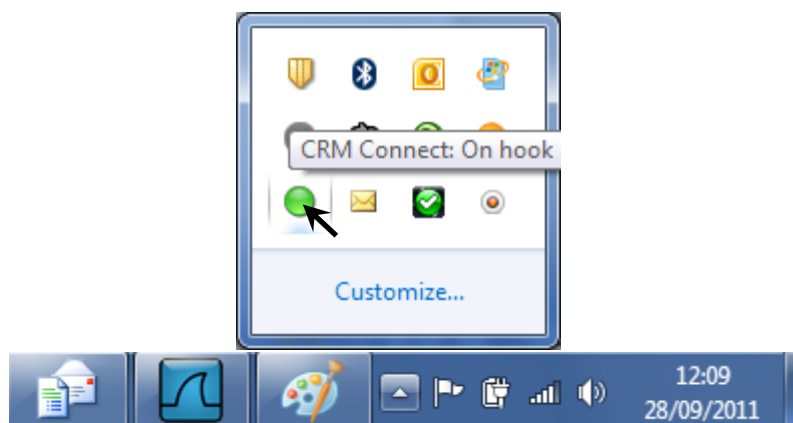
Select the Enterprise Assistant radio button and click Change Password. This sets the Application login password:



5 Start Using CRM Connect

5.1 Where is it?

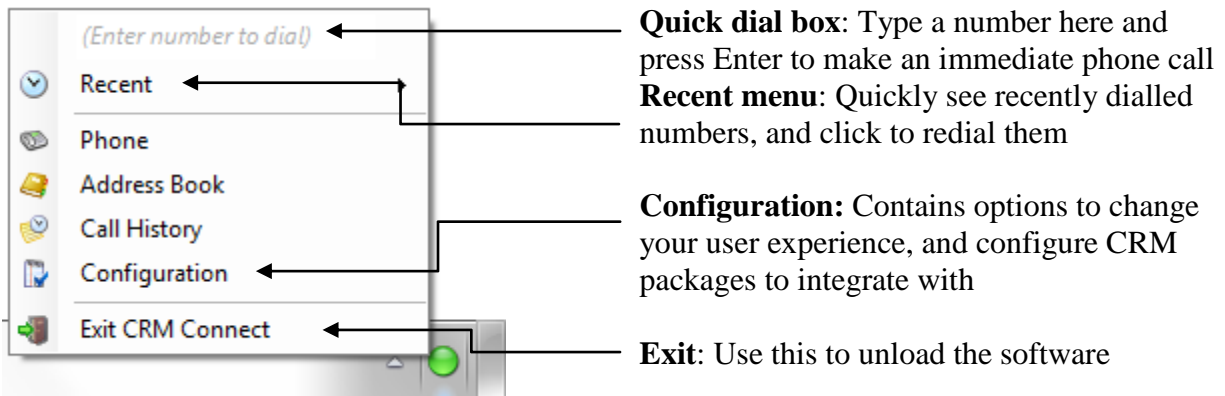
CRM Connect is designed to be discrete. Always running and providing useful information as you need it, yet at the same time not annoying and interfering when you're trying to work. So, most of the time, CRM Connect sits silently in your tray menu, waiting for you to click on it or waiting for calls to be made or received.



Note: In Windows 7, some tray icons become hidden and expressly have to be shown. These settings are stored in the 'Notification Area Icons' part of the Windows Control Panel.

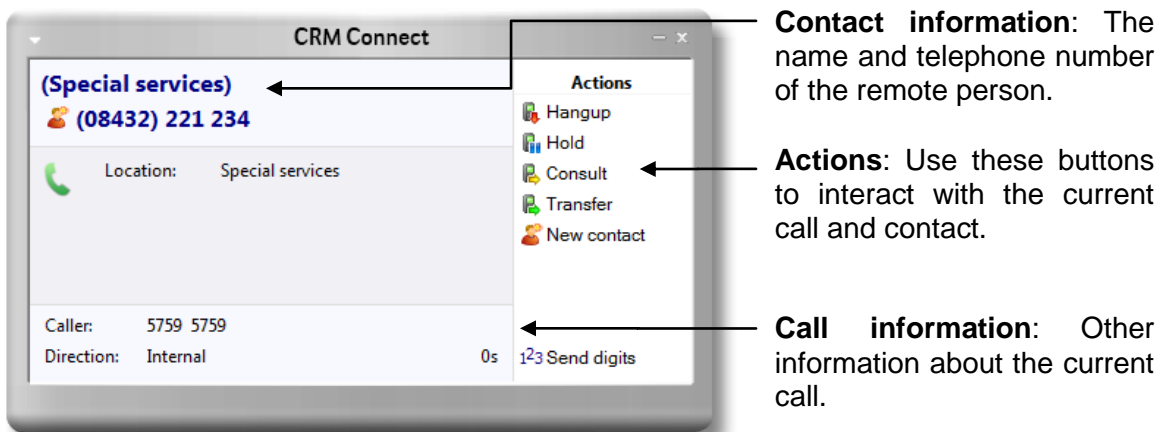
If you right-click on the CRM Connect icon, which is a green circle (or red if you're on a call) and the tray menu should appear.

5.2 Tray Menu



5.3 Phone Window

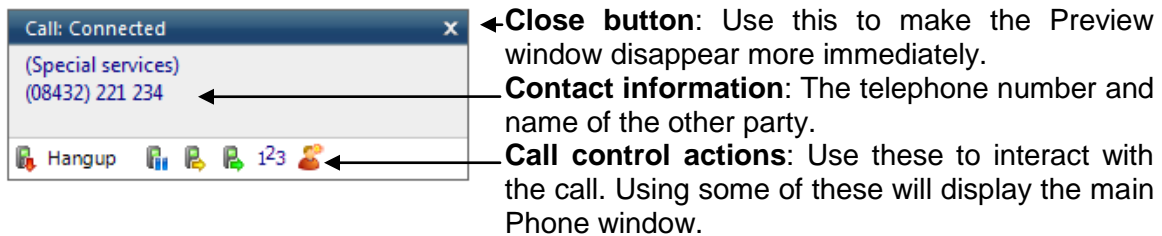
The most obvious place to start is the Phone window (pictured below). Click on that option in the tray menu, or in future you can simply double click on the tray icon and the window will be shown. Let's have a look at the main parts of the Phone window:



At the start, you're likely to use the Phone window if you want to control calls or show contacts. After you've used the software for a while, though, you'll probably prefer to use the Preview window it can be more convenient and less intrusive.

5.3 Preview Window

Make a call in to your extension again and the Preview window should appear. It contains much of the information from the main Phone window, but in a much more compact format. Plus it will disappear shortly after a call connects. Let's review the main parts of the window:



Like the Phone window, the actions at the bottom of the preview window adapt to the state of the call. The example picture shows the actions that are available when a connected call is in progress. To conserve space, the text is only shown for the first two actions. The rest are depicted by their icons only.

Please note that if you also have a Toolbar then the Toolbar preview window may double up with the CRM Connect preview window. You can configure the appropriate notifications for either application. See Troubleshooting section 9.5 for further details.

6 Making Calls and Call Control

6.1 Making Calls

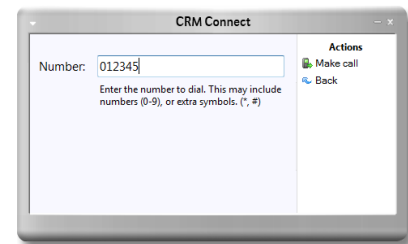
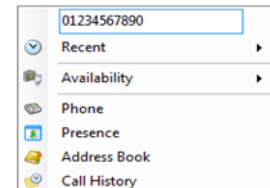
When you make calls, where do you get the numbers from? Let's look at some possibilities:

From a piece of paper

If this is the case then you should think about storing the person's name in your CRM System and then next time, you can find them more easily and dial the number using CRM Connect.

Alternatively, you could right click on the CRM Connect tray icon and then enter the number in the text box at the top. You can even use the backspace key if you type it wrong.

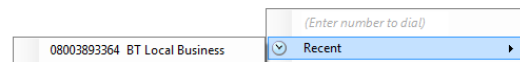
Or, if you happen to have the Phone window open, then just start typing a number on your keyboard. CRM Connect will understand that you want to make a call and switch to the “Make call” screen. Press the Enter key when you’ve finished typing to make the call.



Someone you spoke to recently

If you spoke to them using the phone that CRM Connect is connected to then the call should be in your call history. At the main menu, press the call history button and you will get a list of your calls in reverse date order. If you see the caller in this list, then click on their telephone number to make a call to them directly from this screen.

Alternatively, if the person was one of the last ten people that you spoke to, then they will be in your “Recent” list. You can get to the Recent list from either the CRM Connect tray icon or from the Make call screen.



Note: these Recent numbers are stored on your PC not on the server.

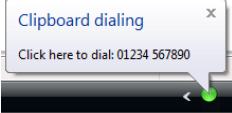
From a web page

You can configure CRM Connect to search your web pages (Internet Explorer only) for telephone numbers to dial. It won’t find all of them, unfortunately, but it is good at phone directory searches because it is optimized to understand this kind of page. To turn this functionality on, you need to go to the Configuration main menu option and then go into Dialling settings. Here you can turn on “Web Page Dialling”. When on this will allow you to click-to-dial recognised telephone numbers directly from Internet Explorer.

More Info	
OAD BEESTON NOTTINGHAM	0115 922 2268
More Info	
ROAD KIRKBY IN ASHFIELD	01623 757 573
BJ Map Photo More Info	

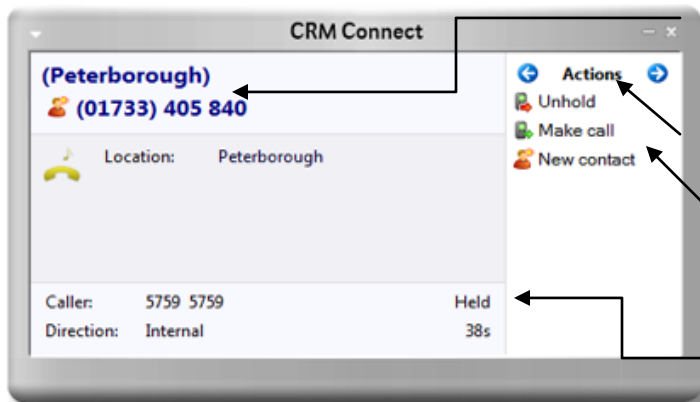
From your CRM

Please see the CRM Connect Integration Guide for your chosen

Software	CRM application for details on how to configure and dial from your CRM system.
From another application	<p>Clipboard dialling can be turned on in the Configuration >> General >> Dialling settings page. When on, CRM Connect will keep an eye on the clipboard and if you copy something to it that looks like a telephone number then a bubble will appear from the tray icon that asks you if you want to call the number.</p>  <p>When using this method of dialling, you may want to help CRM Connect know what is a valid number by entering a minimum and maximum length and possibly a prefix that numbers must start with. This can be done in the Dialling settings page.</p>

6.2 Call Control

Let's take a moment to review the items on the Call screen in the Phone window:



Contact information: The name and telephone number of the remote person.

Page left/right: Use these to switch between calls when you have more than one call in progress.

Call actions: Use these buttons to interact with the current call.

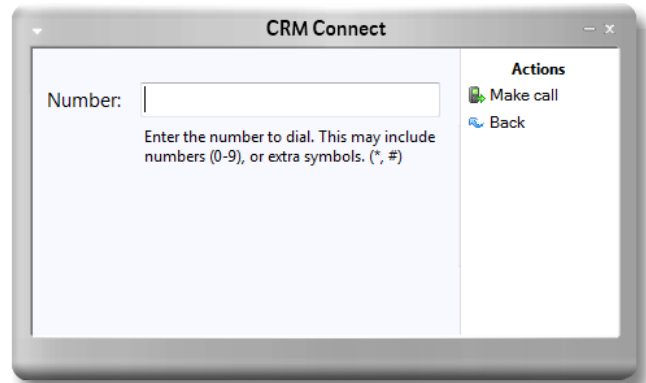
Call information: Other information about the current call.

As you can see, the Phone window allows you to interact with the current call in a number of ways. One of the most common ways is to click on the New contact or Edit contact button to apply a name to the person you are speaking to. This is covered in a later section, Address books.

It is also common to use this screen to perform a transfer of the current call to another extension or user. To do this you must be Connected to the call (as opposed to it being on Hold or Ringing). When you are Connected then the Actions list looks like the above

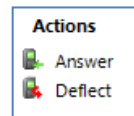
example. To transfer a call you do NOT press the Hold button. The Hold button has a different purpose (more about this later). Instead you either press the Consult or Transfer button. You choose the button according to whether you want to speak to the other person (Consult) or not (Transfer).

You are then presented with a screen like the Make call screen, but with the word Consult or Transfer at the top. Your call is not on hold at this stage yet, but when you are ready, type the number to transfer to (or choose one of the dialling options) and if you are Consulting then the original call will be put on Hold pending transfer (the pending transfer bit is important). If you are transferring then the call will be put straight through.



6.3 More Call Control

We've seen what you can do with a connected call. Can you interact with other calls? Yes, when a call is ringing, you can choose to answer the call or Deflect it (transfer it without answering it) to another extension. Deflecting a call is done in a manner similar to transferring calls. Click the Deflect button, type a number to deflect the call to and click Deflect again.



Deflecting calls is not just used to avoid work. If you are already on the phone and someone else phones you, then you can use Deflect productively to move the call to a colleague who can tell the caller to wait for you to become available.

You can also put calls on hold. Depending on your telephone system configuration, this means that the other person should hear music. When you are ready to talk to them again, use the Unhold button. Remember, the Hold button is not for transferring calls. It is purely to pause the call. If you want to transfer a call that is on hold, then first you will have to take the call off hold first.

7 Address Books, Contacts and Call History

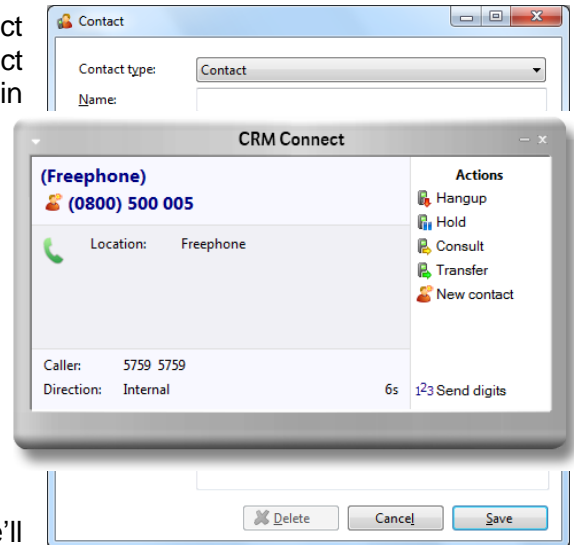
7.1 Creating and Searching Contacts

The Address book window is accessed from the Address book item on the main menu or tray menu icon. Go ahead and open it, let's start by adding a new entry.

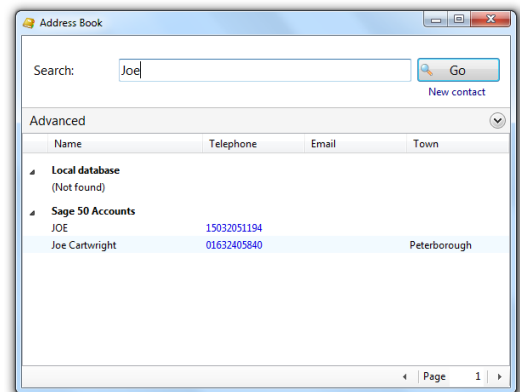
At the top of the window, press the New Contact button. This will present you with a blank Contact window. Enter a name, company and phone number in the relevant boxes. All of the boxes from the Contact window, including the Notes box at the bottom, can be searched. You can also interact with some of the boxes to make a call, send an email, etc.

You may be wondering what the Type box is for at the top of the page. This is used to change the format of the Contact window. Different “types” have different templates. Pick the one that best represents the contact entry that you are creating.

When you’re finished press the Save button and we’ll search for your new entry.



Back at the main Address book window, enter search criteria to find your entry. Most of the time, you can find the results that you want by entering text in the search box and pressing Go. However, if you get too many results back, you may want to consider further restricting your search by using the Advanced section. Names and telephone numbers area searched using the original Search box, but in the Advanced section you can filter by address fields such as town or postal code (Where) or other fields (What) as well. Press the Search button and after a short delay you’ll be presented with a list of results. From this screen you can click on the telephone number of a contact to dial them, or click on their name to edit or view their contact details.



7.2 Storing Contact details when on a call

If you’ve made or received an external call using the Phone window yet, you’ve probably noticed that when CRM Connect doesn’t know who the other party is that you’re speaking to, then it will show a town or location name instead.

It does this in an effort to be helpful, but if you really want to help yourself, then you’ll add a name to the contact for future use.

How do you do this? You press the New contact button on the right hand side of the screen.

You can then store the caller’s details for future use.

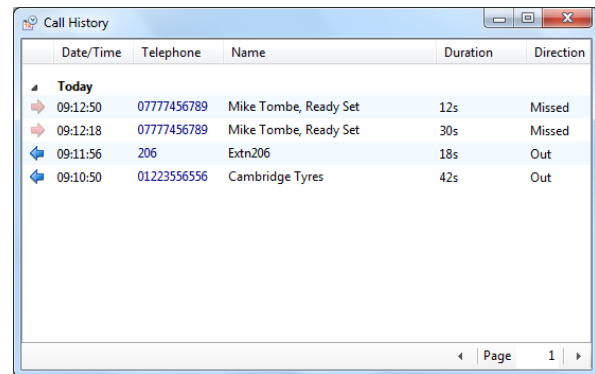
7.3 Adding contact details from the Call History window

You may find it easier to add a contact's name and other details after the call has ended. To do this, go into your Call History and click on where the name would appear (it will be a location name in brackets instead). When you do this, the Create contact window will appear like before and you can edit and save the details.

Date: Today				
←	16:28:01	01162561000	(Leicester)	11 mins, 52 secs
←	14:50:37	01234567890	Bedford test	24 secs

7.4 Call History

The Call History window is accessed from the Call History item on the Main menu or from the tray icon menu. As well as reviewing recent activity you can dial someone from here by clicking on their telephone number and you can access their contact record here by clicking on their name (we saw this in the above section). It's good practice to store the names of people when you speak to them, especially if you're likely to speak to them again.



Date/Time	Telephone	Name	Duration	Direction
Today				
09:12:50	07777456789	Mike Tombe, Ready Set	12s	Missed
09:12:18	07777456789	Mike Tombe, Ready Set	30s	Missed
09:11:56	206	Extn206	18s	Out
09:10:50	01223556556	Cambridge Tyres	42s	Out

By default, the Call History screen returns the fifty most recent calls. The next fifty can be accessed by pressing the page right button in the bottom right of the window.

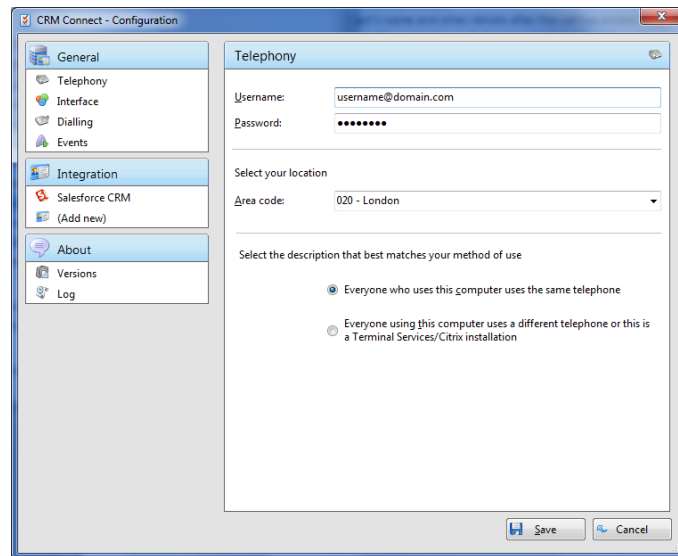
Also, to aid readability you can hide and show individual days from your history by pressing the expand/collapse button to the left of the date.

8 Settings and Configuration

The Settings menu contains many options that you can change to improve your use CRM Connect.

Let's take a look at some of the more common ones.

If you select the Configuration menu item from the tray menu then you are given a page with options on the left hand side.



8.1 Telephony Settings

When you first install Connect, it takes you through an installation phase where you need to tell it your Username and Password.

When it does this, it presents the Telephony settings page of the Configuration window, so you may have seen these before. If your Username and/or Password change then you will need to update the details.

Next is your area code which is used to recognize local phone numbers.

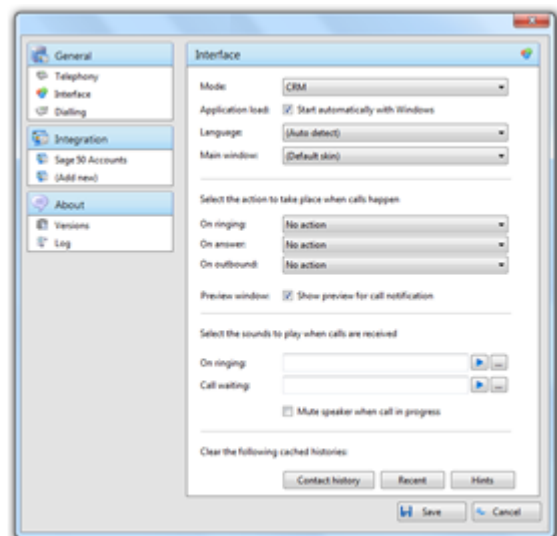
The last choice, "method of use", is useful when several people share the same PC. Read the two choices and select which one best fits your mode of working.

8.2 Interface Settings

The Interface page allows you to change settings relating to the look and feel of the software, including actions that happen when calls take place.

To have the software start automatically when you log on to Windows, put a tick in the tickbox. The setting will take effect next time you log on to Windows.

Language packs are available for the software to change the language of the user interface. By



default, the software will attempt to automatically select the language to use based on the language setting of your operating system. However, you can change the language used by selecting from the Language dropdown list. If your language is not in the list, contact your reseller to find out when it will be available. Any changes you make to the language will take effect next time you start the software.

By default, many of the software's windows have a "skin" to make them look nice. If you find that you don't like the "skinned" windows, perhaps for accessibility reasons, you can turn them off by selecting "No skin" from the Phone window dropdown. The next time you load the software, the windows will all be standard Windows-style windows using the theme from your operating system.

The next section on the Interface page allows you to choose a sound to have your computer play when your phone is ringing and/or you have a call waiting.

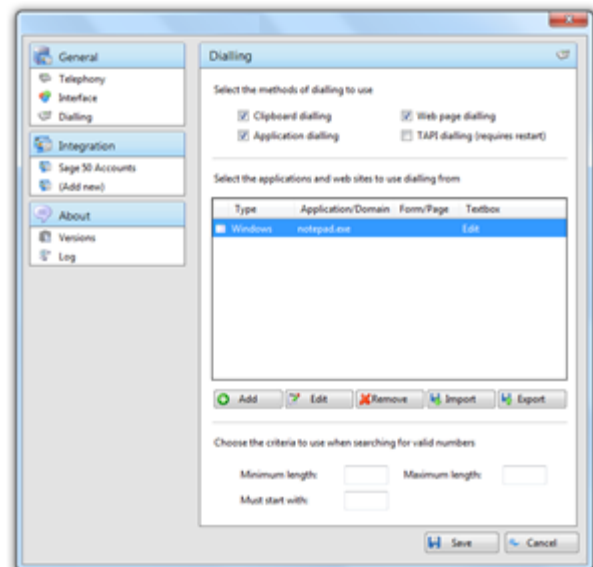
This can help you to uniquely identify that it is your phone that is ringing and not a colleague's. You can also tick the box to have your computer's sound automatically muted whenever a call is in progress, which is useful if you listen to music or Internet radio while you work, giving you a more professional appearance.

The last section of the Interface page has buttons you can press to quickly and securely clear the history of contact history, recent numbers (as shown in the Recent list), and which hints the software has shown you (clearing hint history allows the software to show you the hints again).

8.3 Dialling Settings

This page allows you to turn on and off dialling from all the different types of application that the software supports. As a review, the different methods of dialling are: Clipboard dialling (where you copy a telephone number to the clipboard and the software detects it), Web page dialling (where the software automatically scans web pages in Internet Explorer and converts anything that looks like a telephone number into a clickable hyperlink and adds new buttons next to telephone number fields that you have told it about) and Application dialling (where the software adds new Dial buttons to applications that you have told it about).

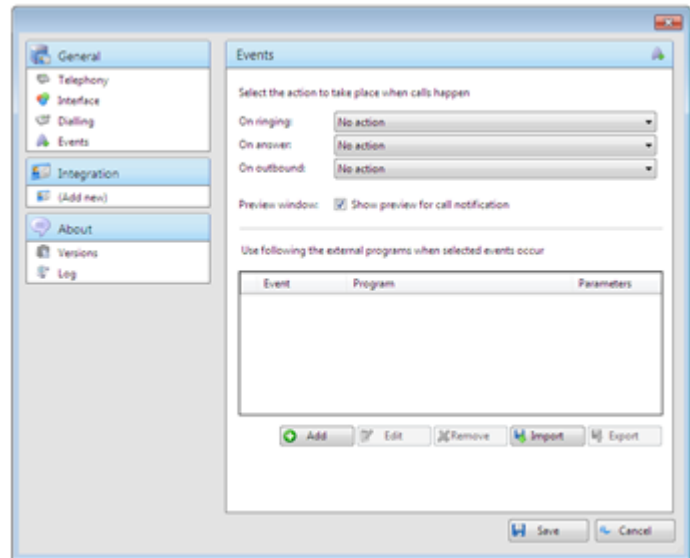
Please note that Microsoft Word and Excel dialling via SmartTags are not available in Office 2010



The last section on this page allows you to define what telephone numbers look like, to help the software more accurately determine whether a string of numbers it sees in a webpage or on the clipboard is really a telephone number or not. You can tell the software the minimum and maximum length of telephone numbers (anything outside the range will be disregarded as not a real telephone number), and you can also specify that telephone numbers must begin with a certain string of characters.

8.4 Events Settings

You can make the software either show the Phone window or pop the contact when certain events happen. Just select the relevant action from the relevant dropdown list: On ringing, On answer, or On outbound. You can also turn on or off the unobtrusive Preview window for all calls by ticking or clearing the box.



The software can also be configured to run one or more custom executable on selected events. To configure this, press the Add button and configure the following information: The Event list is used to select the event on which to run the program. The Program box allows you to select which executable to run. This box should be left blank to load an internet browser.

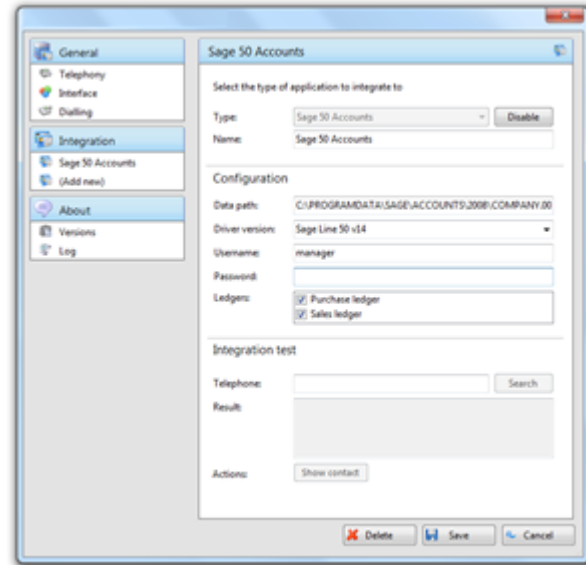
The Parameters box allows you to either choose the “command line arguments” for the program, or in the case of a browser, the URL to load. When using a URL, make sure that you include the URI scheme (i.e. HTTP://). Then you can include in the Parameters any number of values from the call. For instance, to output the caller’s telephone number you can include %Call\CallerContact\Tel%. To use the telephone number of the remote party (as opposed to the caller, who may be the local user), you can use the syntax %Call\Contact\Tel%, or you can use %Call\Contact\DisplayTel% to get the formatted number.

Finally, to help testing, you can use the word Message Box in the Program entry, if you want to show a message box with the translated Parameter output.

8.5 Integration Settings

The Integration pages allow you to setup and modify the CRM Software that you can integrate CRM Connect with. Integration means the your CRM system will be searched when calls happen to automatically convert telephone numbers into names; and the database will be searchable manually from the Address Book window; and contacts that are found in the database can be “popped”.

To create a new CRM integration, click the (Add new) item, select the type of CRM Integration from the dropdown list, and click Set (the first time you enter this screen you may have to wait a few seconds as the software scans to find out what integrations are available).



See the ‘Integration Guide’ for your chosen CRM Application for details on how to configure the required settings and functionality.

To modify an existing integration that you have set up, click its name in the list. You can also click its name and then click Delete if you no longer want integration to that CRM software.

For applications like Outlook, the software attempts to find and use default settings that will “just work” for you, so you won’t need to do anything more. For more complicated integrations, the software will do as much as it can for you, but you may need to help it by for example entering your password, or telling it where the CRM software files are, etc.

The Integration test area allows you to test the settings you have entered by entering a telephone number and seeing if the software can find it. If the number is found, you can click the Show contact button to make sure that “popping” works.

When you are done, click Save. The new integration will be available immediately.

The CRM Connect Integration Guides show you how to configure and use these integrations with your CRM system. Obtain and follow the guide to take advantage of these features, or you may wish to contact your System Administrator to set these up for you.

9 Troubleshooting

9.1 Installation

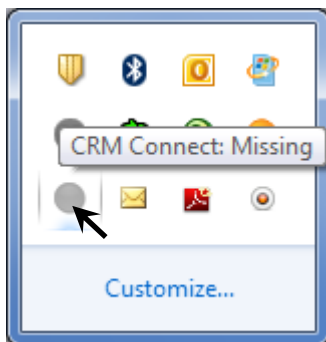
The Installation Wizard should report back information on anything that is stopping successful installation, such as Administrator privileges, Anti-Virus, other open applications etc. Please ensure that the minimum requirements are met, that the installation package is saved and run with local Administrator privileges for successful installation.

9.2 Running CRM Connect

CRM Connect should be run with local Administrator privileges. Please see the log within the Configuration panel for information on troubleshooting any issues.

9.3 Login Process

CRM Connect requires you to enter the correct Username and Password and have a current CRM Connect license applied. If the Username and/or Password are incorrect or you do not have the required license then “CRM Connect: Missing” will be displayed when hovering over the application icon in the system tray as shown below:



The icon should be green (or red when on an active call) when you are successfully logged in. If this is not the case please check the Username and Password.

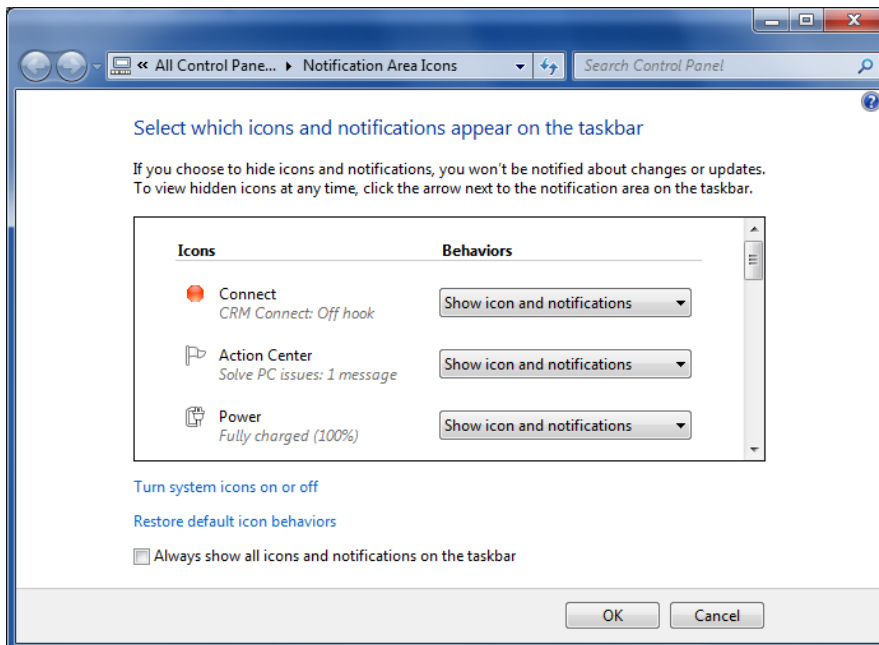
9.4 Integration with CRM Software and Other Features

Please see the appropriate CRM Connect Integration Guides for information on how to integrate with the chosen CRM software. This User Guide for shows how other features such as Call History, Web Page Dialling etc. work. If you are having problems integrating CRM software with the application or using CRM Connect's features please check the log for information.

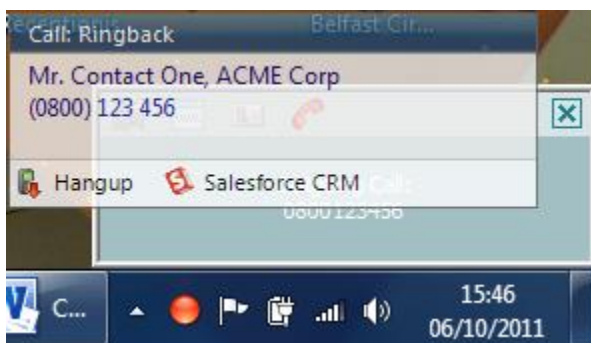
9.5 Taskbar / System Tray Icon and Preview Window Notification Management

Sometimes changes can be made to settings in Windows, CRM Connect or other applications to make the visibility and usability of CRM Connect easier.

For example, it is advised that **Windows 7 Users** configure the settings in the Windows Control Panel >> All Control Panel Items >> Notification Area Icons for CRM Connect and set the behavior to Show icon and notifications. This is shown below:

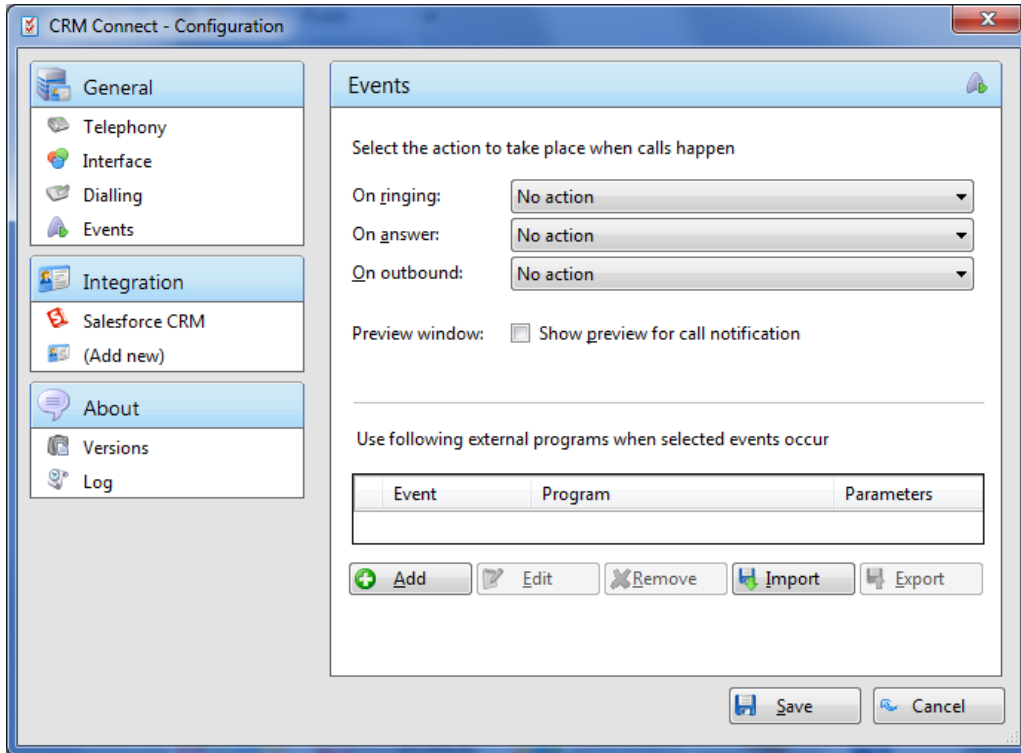


Another example is if you have a Toolbar, which also provides a preview window. This can cause a double pop up notification as shown below:



You can disable the notifications in either application to rectify this.

To do this in CRM Connect navigate to the Configuration panel, select Events from the menu on the left and untick 'Show preview for call notification' and click Save:



To do this in the Toolbar click the Options button, select General from the menu on the left, tick 'Hide call notifications' and click Apply:

