Phone Manager
Mitel Phone Manager - Application Support

⋈ Mitel

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Mitel Phone Manager
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2 Application Support Plugins

Overview

Phone Manager Professional License contains plugins available that are able to directly integrate with a range of well known CRM and PIM applications. The plugins generally provide deeper, more seamless integration than other methods as they leverage the APIs of the specific application.

Features

There are 4 features that the plugins can provide. Depending on the application that is being integrated with, only some features may be available with varying levels of support and there may need to be integration work performed by the application vendor or administrator of the system. See the application integration document for the specific plugin for details.

- **Dial out directly from the application**: For example having a dial button next to a telephone number field.
- **Screen popping**: Searching the application for contacts that have matching caller ids and displaying the record.
- **Call history**: Creating a call history phone call activity in the application with the call details.
- **Calendar and DND synchronisation**: Controlling the DND state of the extension based upon calendar entries in the application.

> If multiple features are required then a new application support set up is needed for each one. E.g. screen pop and call history are required, an application plugin needs adding and configuring for each one.

Configuration

> If the configuration of the CRM application is changed from using the standard fields, field types or formatting or it is customised then this may affect the operation of the product plugin.

> If the CRM installation path is required by the plugin this may vary based on whether the machine is 32bit or 64bit. The default location of c:\program file (x86) may need to be changed.

To configure a plugin for one of the application support features:

1. From the Application Support Configuration section.
2. Click on the **New** button.
3. From the list of **Application**s select the application to integrate with.
4. This will then change configuration on the right hand side to show the specific configuration required for this plugin. See the relevant integration document for details.
5. Select the **Feature** to enable either:
    - Screen pop
    - Call history
    - Calendar / DND sync
6. Multiple features can be enabled for each plugin by repeating the process from step 1.
7. Select the event trigger that will cause the feature to be acted on (this is not applicable to Calendar / DND sync).

- Direction: inbound, outbound or both.
- State: call ringing, call answered, call cleared, call cleared only when answered or user controlled (i.e. via a toolbar button).
- Type: external, internal or both.

8. Click on **Save**.

3   Goldmine

Overview

This describes the features that are available when integrating with Goldmine.

Supported Versions

The following Goldmine versions are supported.

Version	Supported
Goldmine v2018.1 (SQL)	✅
Goldmine v2017.1 (SQL)	✅
Goldmine v2016.1 (SQL)	✅
Goldmine v2015.1 (SQL)	✅
Goldmine v2014.2 (SQL)	✅
Goldmine v2013.1 (SQL)	✅
Goldmine v9.2 (SQL)	✅
Goldmine v8.0 (SQL)	✅
Goldmine v7.0 (SQL)	✅

Features

Integration supports the features listed below:

- Click to dial - TAPI
- Click to dial - GM+
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

Click to dial - TAPI

Goldmine supports dialling out directly from a Contact using the highlight and dial feature or using TAPI.

To configure this within Goldmine from the *Tools -> Options* menu select the Telephony tab as shown.
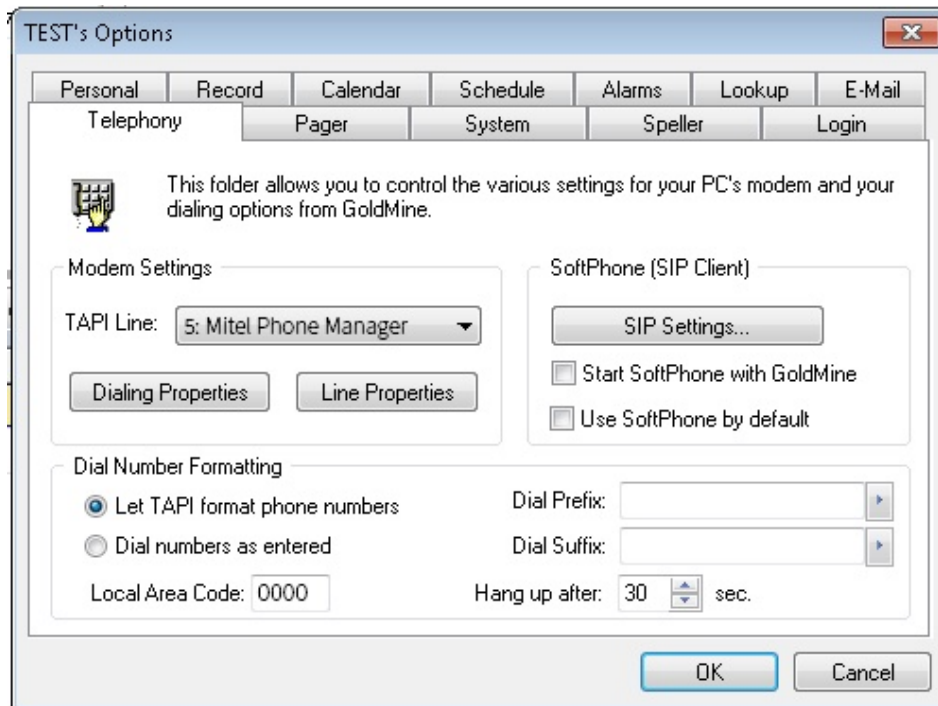
Then select the Phone Manager TAPI option from the TAPI Line drop down box in the Modem Settings. Contacts can then be dialled by either right clicking on the Phone description field (i.e. Phone 1, Phone 2 or Phone 3) and selecting Dial or clicking on the button from the toolbar menu – this dials the Phone 1.

⚠ See the Phone Manager User Guide for TAPI requirements

Click to dial - GM+

Goldmine supports dialling out directly using a GM+ View that converts the telephone numbers into clickable hyperlinks that call the number when selected.

When using Goldmine and TAPI for outbound dialling Goldmine displays addition dialogue boxes that "pop-up" within the Goldmine user interface, these additional dialogue boxes cannot be disabled within Goldmine. Using the GM+ View does not cause these boxes to be displayed or have any of the limitations of using TAPI, including unable to use in a multi-user environment.

GM+ Views once created change their content based upon the currently selected contact within Goldmine making it ideal for creating hyperlinks. GM+ View tab will need to be enabled by a Goldmine system administrator for clients, and can only be edited / created by a Goldmine Administrator.
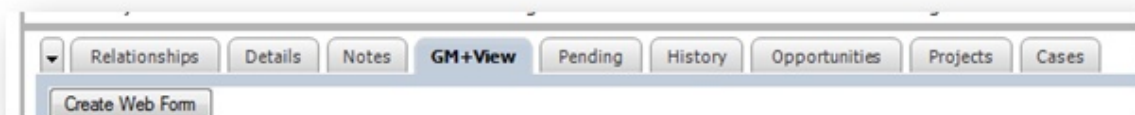
The GM+ View tab can have multiple "Templates" associated with it, this allows the user to select which information they wish to see. These templates can be static or rules based. A full explanation of templates is NOT covered by this document.
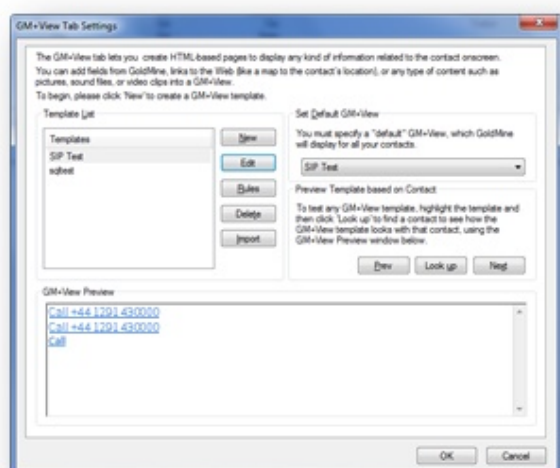
When creating a template you will be provided with the Goldmine template editor, the first step should be to click the HTML editor button to change it to its HTML editing view (Highlighted in red in the image below).
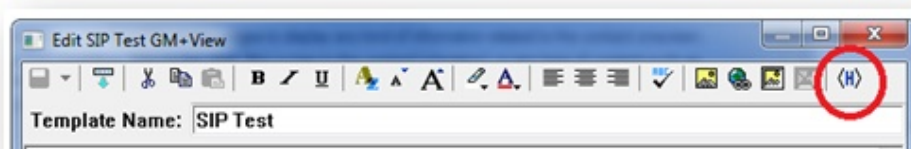
The following HTML snippet can be pasted into the editor:

```
<a href="sip://&lt;&lt;&amp;phone1&gt;&gt;">Call &lt;&lt;&amp;phone1&gt;&gt;</a>
```

This snippet when viewed via the GM+ View in Goldmine will provide a SIP URI link containing the phone number contained in the Phone1 field of the current contact, and will dynamically change based on the selected contact. Addition entries can be added to the GM+ View template containing Phone2, Phone3 fields from Goldmine by editing the above examples substituting phone1 with either phone2 or phone3. If a phone field has no number then a blank call entry will be shown.
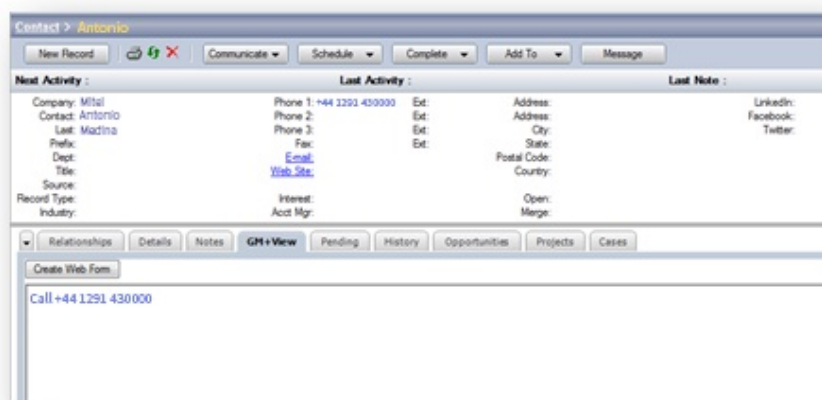
Screen pop for contacts

The Goldmine contacts can be screen popped directly within Goldmine when an incoming call is received using the

caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 02071975186 as shown on the toaster. The plugin performs a search on the contacts to find any records that have matching telephone numbers. A match was found and the contact record was automatically displayed.
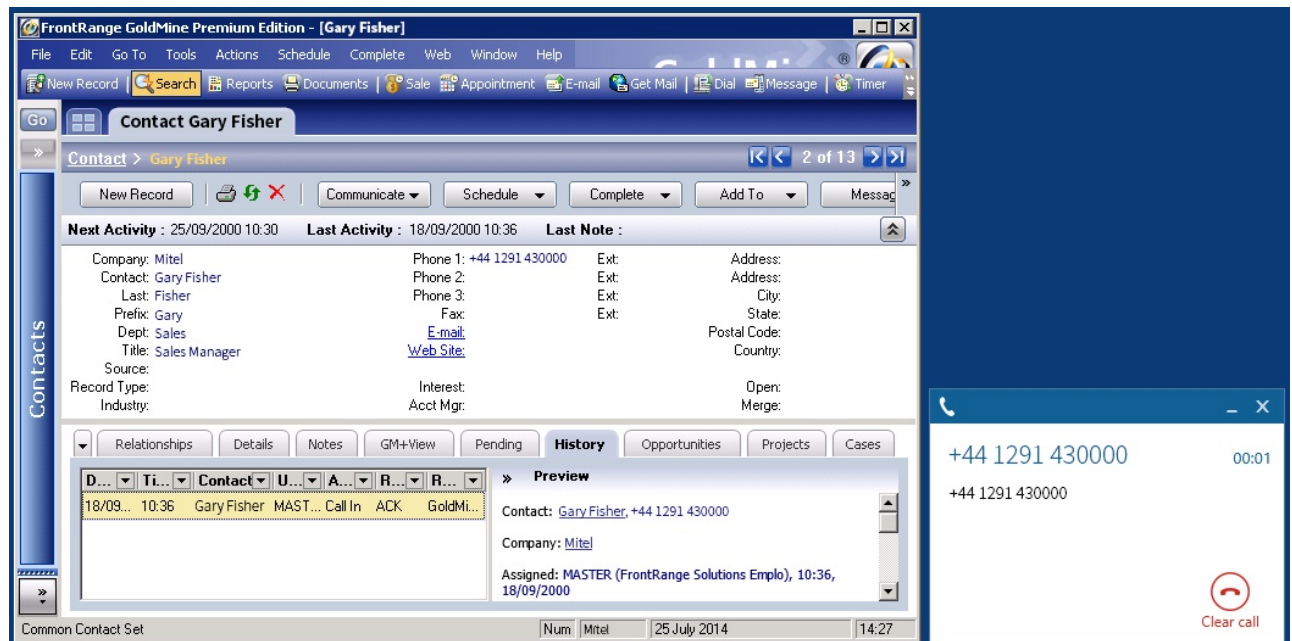
If multiple matches are found then the first Contact found with this telephone number will be displayed.

Contact fields

The range of telephone numbers that are to be searched for can be configured. By default the common telephone number fields are pre selected.

Field Name	Enabled?
Account Number	✅
Phone 1	✅
Phone 2	✅
Fax Number	✅
All Telephone Fields	✅

Telephone number formats

Goldmine does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

Automatic call history entry

Phone Manager can work with the History within Goldmine and can have *Call Completed* entries automatically created for calls made or received by the User when a match has been found to an entry in their contacts. The contact to associate with this is found using the caller id received or dialled number.

The notes section of the call entry is populated with the information shown.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a

browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Calendar & DND synchronisation

The calendar within Goldmine can be synchronised with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the *Reference* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

For example the *Appointment* entry below will place the Users extension into DND between 09:00 and 16.30 with the DND text set to "Sales Meeting".
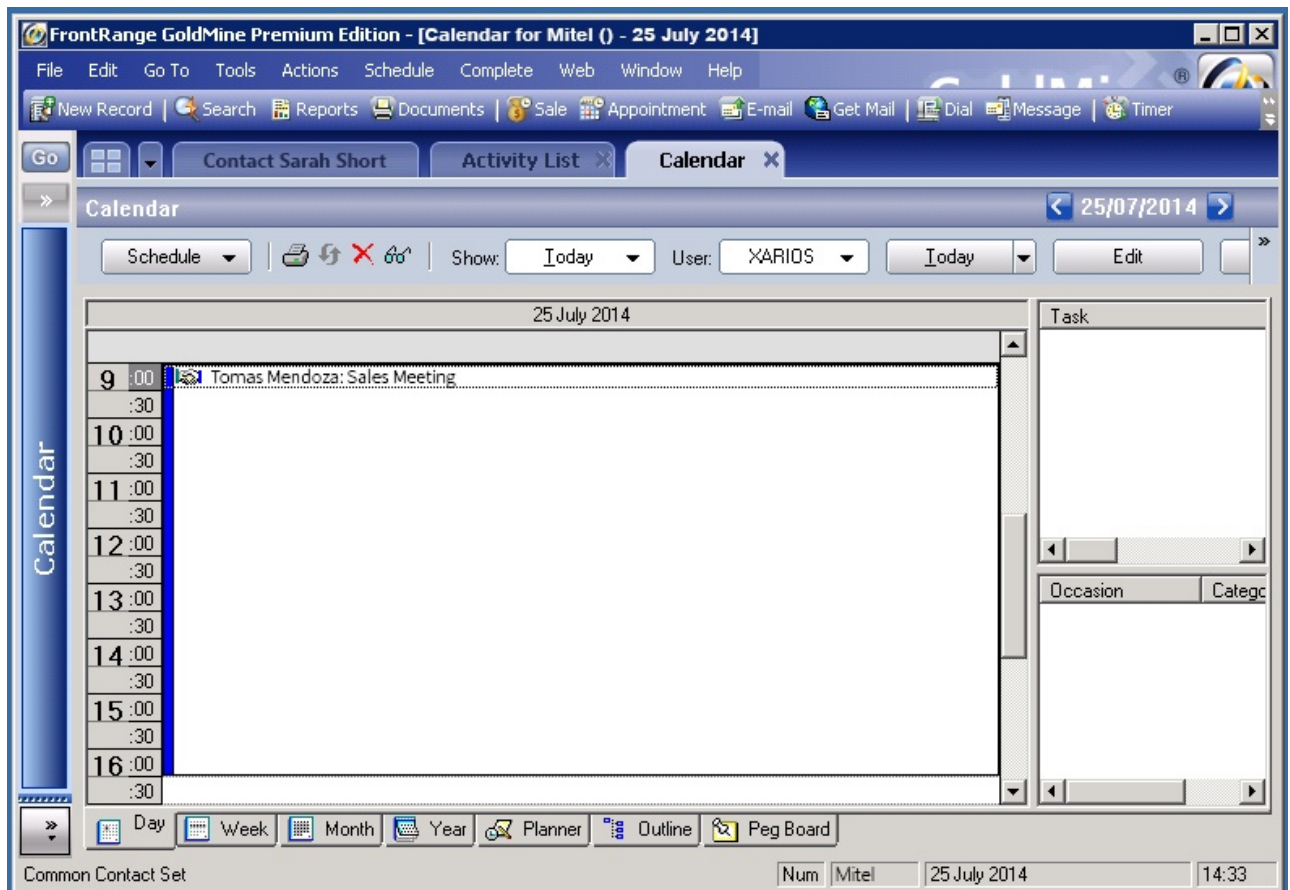
Configuration

The integration needs to be configured for the correct version of Goldmine that is running. From the *Version* tab select the relevant entry from the drop down list.

4 Maximizer

Overview

This describes the features that are available when integrating with Maximizer.

Supported Versions

Version	Supported
2015 (v13.0) Desktop Client	✅
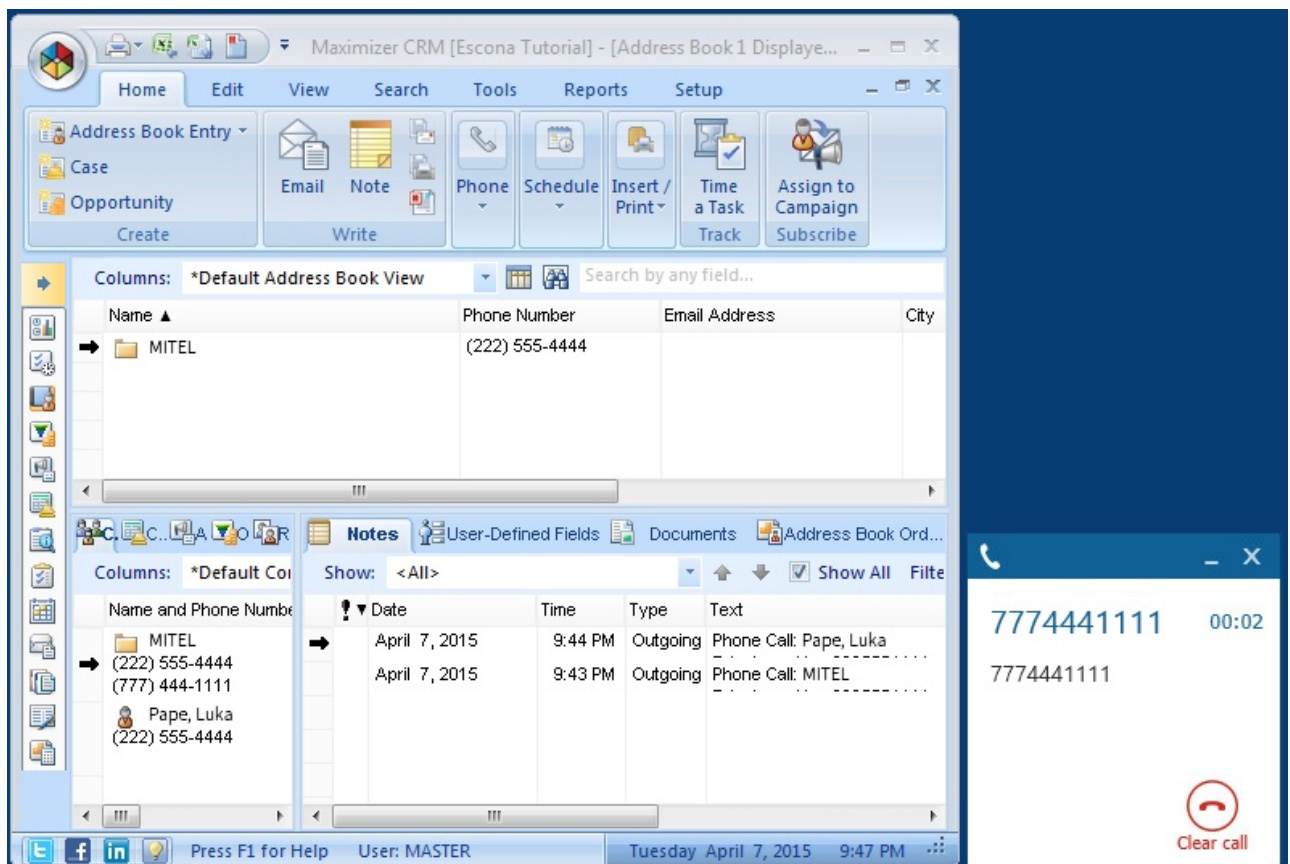
Features

Integration with Maximizer supports the features listed below:

- Screen pop
- Automatic call history entry

Screen pop

Company, Individual and Company Contact records can be screen popped directly within Maximizer when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching records that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have this telephone number. A matching Company entity was found and the associated record was automatically displayed within Maximizer.

If multiple matches are found then the *Multiple Matches* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching records, a *Company Contact*, *Company* and *Individual* record that have this telephone number.
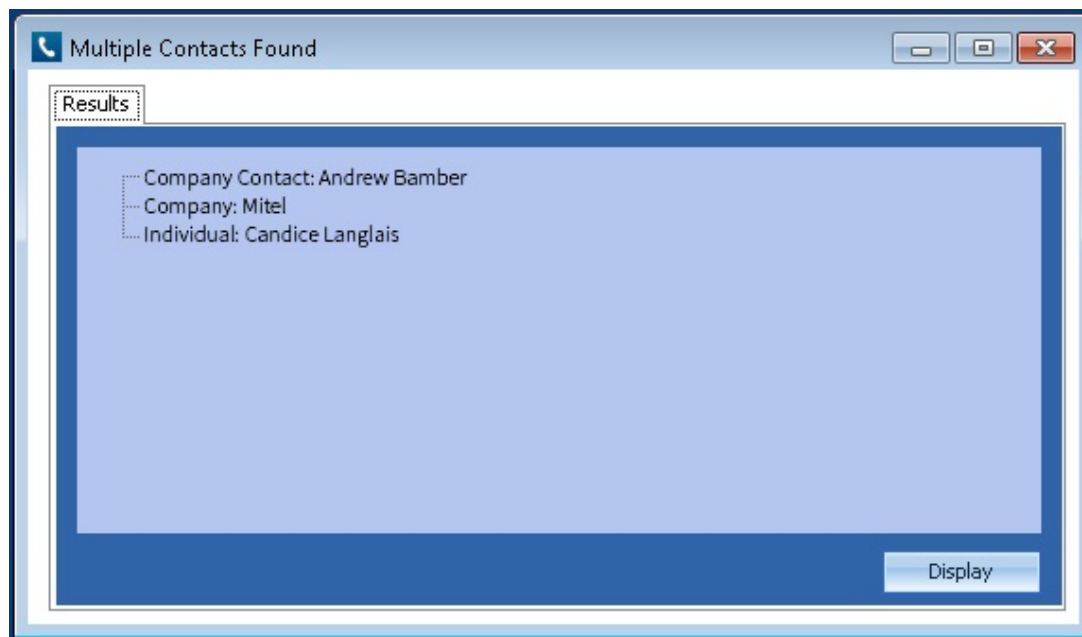
The correct record can then be highlighted and then clicking on the *Display* button will open this associated record.

Automatic call history entry

The plugin supports the ability to be able to automatically create a Maximizer "Phone Call" Note. The record to associate this with is found using the caller id received or the number dialled.

The record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Configuration

Authentication

The database authentication details used to connect to the Maximizer database are configured on the *Authentication* tab.
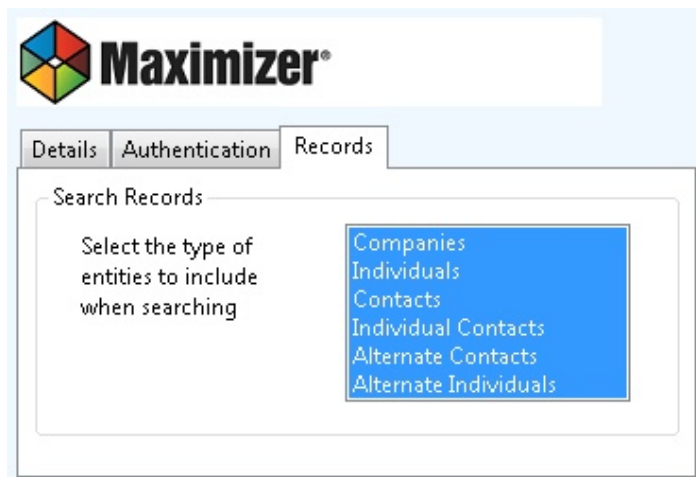
Enter a valid Maximizer **Username** and **Password** into the relevant fields.

Records

The type of records to include when performing a search can be controlled on the *Records* tab.

5   Microsoft Dynamics CRM

Overview

This describes the features that are available when integrating with Microsoft Dynamics CRM.

Supported Versions

The following Microsoft Dynamics CRM versions are supported.

Version	On-premise deployment	Internet-facing deployment (IFD)	Microsoft Online
v5 (2011)	✅	✅	✅
v6 (2013)	✅	✅	✅
v7 (2015)	✅	✅	✅
v8 (2016)	✅	✅	✅
Dynamics 365 (2016)	n/a	n/a	✅

Features

Integration with Microsoft Dynamics CRM supports the features listed below:

- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.

If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Contact* entities that have this telephone number. This also will then show the any related entities, in this example the *Account* the contact is associated with.
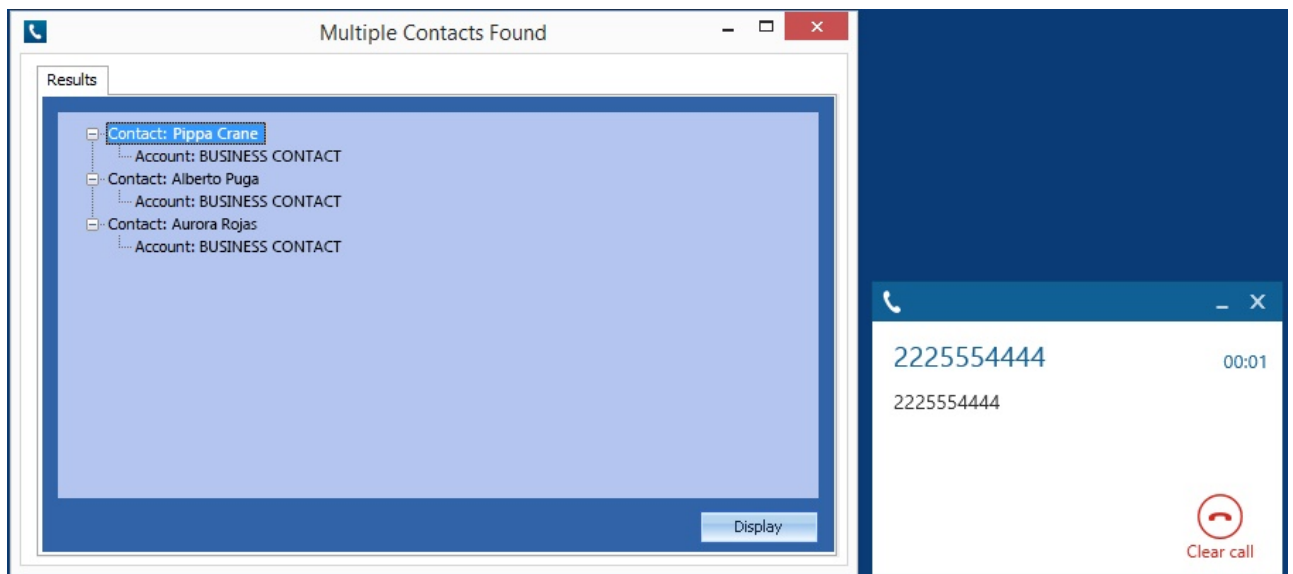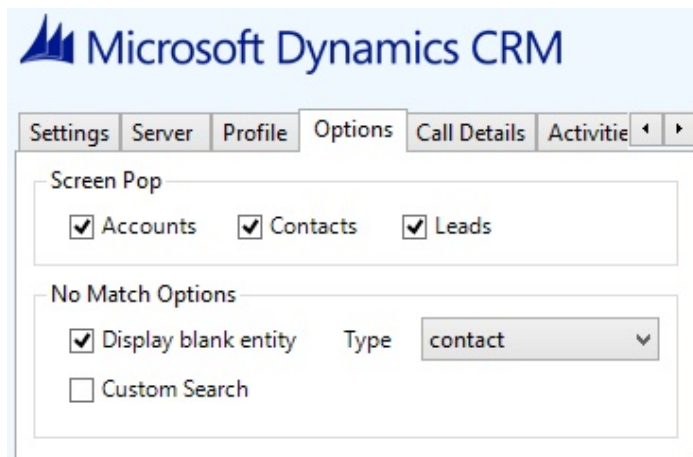

The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

The plugin will only search for *Accounts* and *Contacts* that are in the *Active* state. If any records have been *Deactivated* then they will not be displayed.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* Entities are searched. These options are set on the *Options* tab
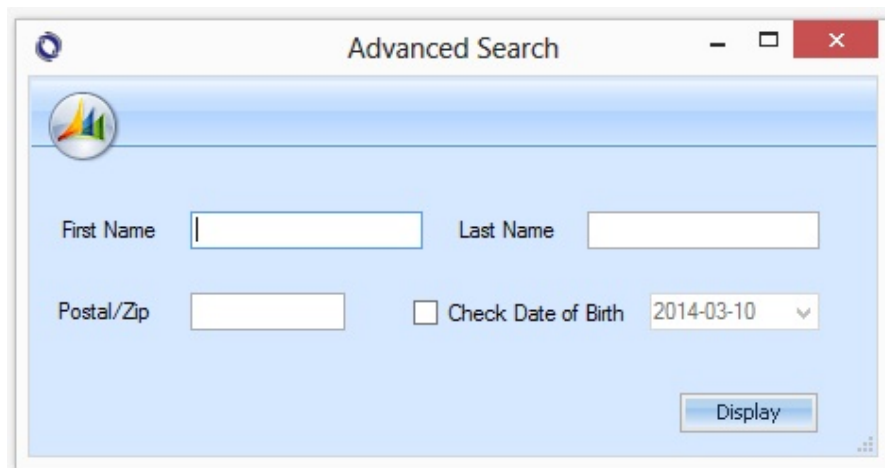
If no match is found then the *Custom Search* option can be selected and this will display a form to allow the user to enter the first name, last name, date of birth or post code and these values will then be used to try and find any matching records.
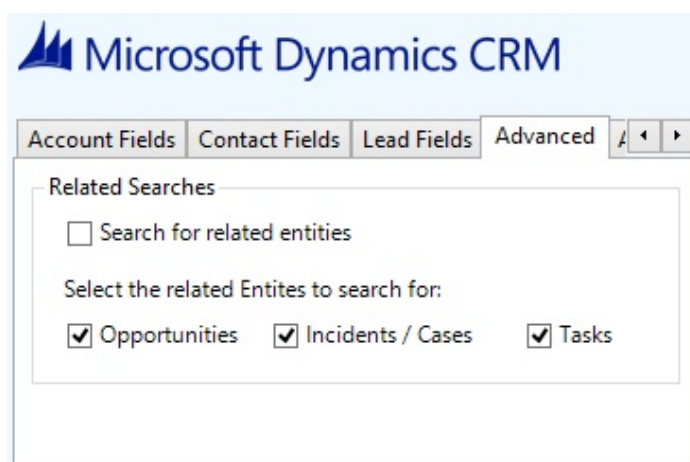

If still no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Advanced options

The *Advanced* tab allows control over if related Entities of a matching *Contact*, *Account* or *Lead* are shown in the *Multiple Contacts Found* window.

Any related Entities that have their *statecode* as *Open* (for Opportunities & Tasks) or *Active* (for Incidents/Cases) will then be displayed in the *Multiple Contacts Found* window. Selecting these related matches in the *Multiple Contacts Found* window and clicking *DIsplay* will then pop this record.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* Entities individually. By default the common telephone number fields are listed on the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.
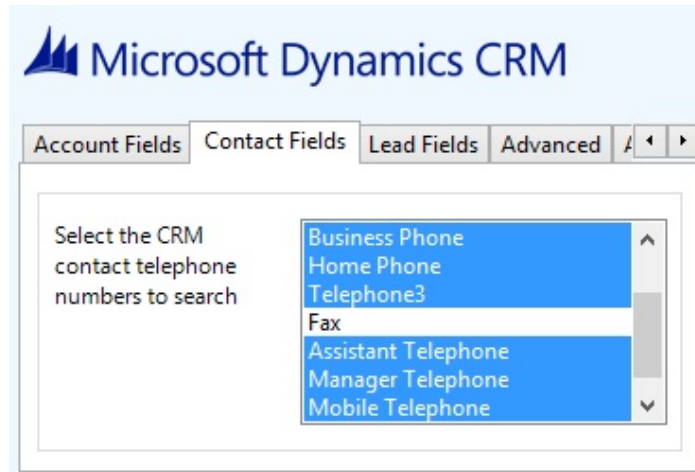
These are the default field name and descriptions and may be different if they have been customised. Contact your Microsoft Dynamics CRM administrator for details.

Contact Entities

Field name	Field description	Enabled?
Business Phone	telephone1	✓
Home Phone	telephone2	✓
Telephone3	telephone3	✓
Fax	fax	✓
Assistant Telephone	assistantphone	✓
Manager Telephone	managerphone	✓
Mobile Telephone	mobilephone	✓
Pager	pager	✓
Primary Address Phone 1	address1_telephone1	✓
Primary Address Phone 2	address1_telephone2	✓
Primary Address Phone 3	address1_telephone3	✓

Account Entities

Field name	Field description	Enabled?
Main Phone	telephone1	✓

Other Phone	telephone2	✅
Fax	fax	✅

Lead Entities

Field name	Field description	Enabled?
Business Phone	telephone1	✅
Home Phone	telephone2	✅
Other Phone	telephone3	✅
Fax	fax	✅
Mobile Phone	mobilephone	✅
Pager	pager	✅

Telephone number formats

Microsoft Dynamics CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.

📑 Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a Microsoft Dynamics CRM Phone Call Activity entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The Activity record is automatically created with the information relating to the call entered into the description field and the related entities are linked as shown.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.

Complete Activity Record: This will set the status of the Activity to be Completed.

Display Activity Record: This will display the Activity form, if this is not set then the record will be created without the user seeing the form.

Calendar & DND synchronisation

The calendar within Microsoft Dynamics CRM can be synchronised with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due to start the extension can be automatically placed into DND with the DND text set to the *Subject* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

There are several options to be able to control the types of Activities that cause the extension to go into DND. The *Priorities* tab allows Activities with a specific priority to be included or excluded.
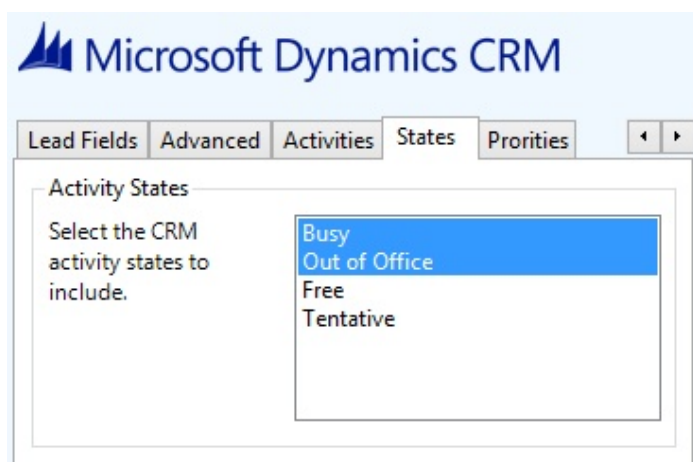
The States tab allows only Activities with specific states to be included or excluded.

The Activities tab allows specific types of Activities to be included or excluded.
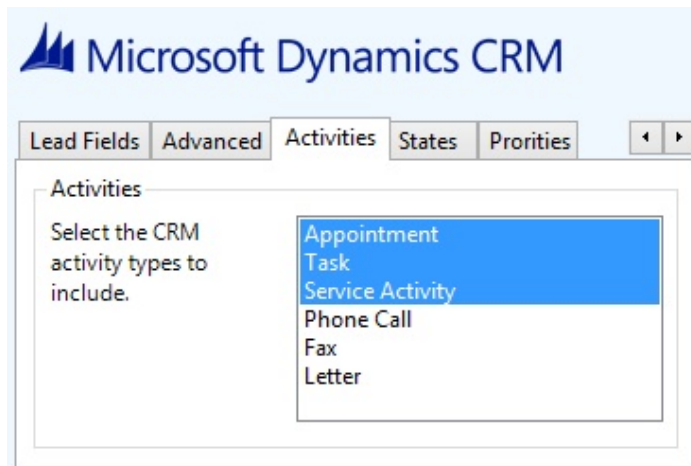
Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Dynamics CRM.

Settings and versions

The correct version of Dynamics CRM that is used needs to be selected from the Version drop down on the *Settings* tab.
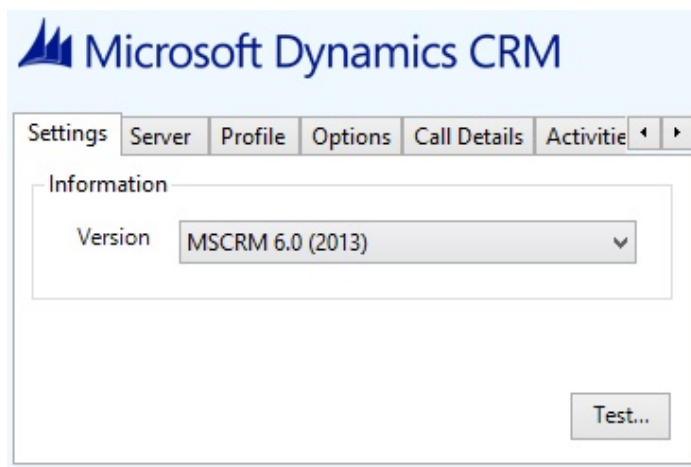
Server connection

The specific connection details to the CRM server need to be set on the *Server* tab.

Discovery Server: This is the URL of the Microsoft Dynamics CRM discovery server. This is normally the same as the CRM server. Contact your administrator for details on what this should be.

For the Microsoft hosted version use the following based upon the organisation location.

Location	Discovery Server
North America	crm.dynamics.com
North America 2	crm9.dynamics.com
Europe, Middle East and Africa (EMEA)	crm4.dynamics.com
Asia Pacific Area (APAC)	crm5.dynamics.com
Oceania	crm6.dynamics.com
Japan (JPN)	crm7.dynamics.com
South America	crm2.dynamics.com
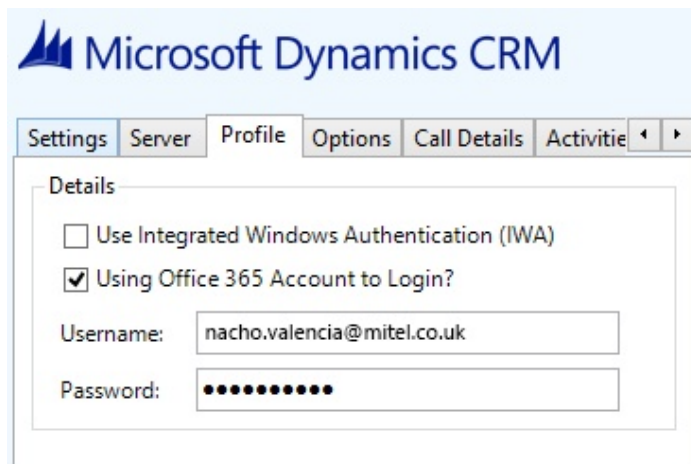
Does this server use SSL: If SSL/HTTPS connection is required to connect to the CRM system enable this option.

Organisation Name: This should be set to the organisation name configured for the company that will be used to integrate with. This should match the exact name shown in the top right hand corner of the CRM web page when you are logged in.

Authentication and profile details

The Profile tab enables the security credentials used to access Microsoft Dynamics CRM to be configured.

Use Integrated Windows Authentication: If this is set then the username, password and domain details from user who is logged on the computer will be used.

⚠ Using Integrated Windows Authentication is NOT supported when using IFD and claims based authentication.

Depending on the configuration of Microsoft Dynamics CRM and how it is accessed will determine what options are required.

6 Microsoft Dynamics NAV

Overview

This describes the features that are available when integrating with Microsoft Dynamics NAV.

Supported Versions

The following Microsoft Dynamics NAV versions are supported.

Version	Client	Supported
v4.0 SP2	Classic Client	✅
v5.00	Classic Client	✅
v6.00 (2009)	Classic Client	✅
v6.00 (2009 R2)	RoleTailored Client	✅
v7.00 (2013)	Web Client	✅
v7.00 (2013 R2)	RoleTailored Client	✅
v8.00 (2015)	Web Client	✅
v8.00 (2015)	RoleTailored Client	✅
v9.00 (2016)	Web Client	✅
v9.00 (2016)	RoleTailored Client	✅
v10.00 (2017)	Web Client	✅
v10.00 (2017)	RoleTailored Client	✅

Features

Integration with Microsoft Dynamics NAV supports the features listed below:

- Screen pop

Screen pop

Microsoft Dynamics NAV *Contact* or *Customer* cards can be screen popped directly within NAV when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* was found and the card was automatically displayed within the NAV client.

This example shows the RoleTailored Client.

This example shows the Microsoft Dynamics NAV web client, the matching contact is shown using the Users default browser settings.

If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct card to be displayed. For example a call is made to 222555444 and this has found three matching *Contacts* that have this telephone number.
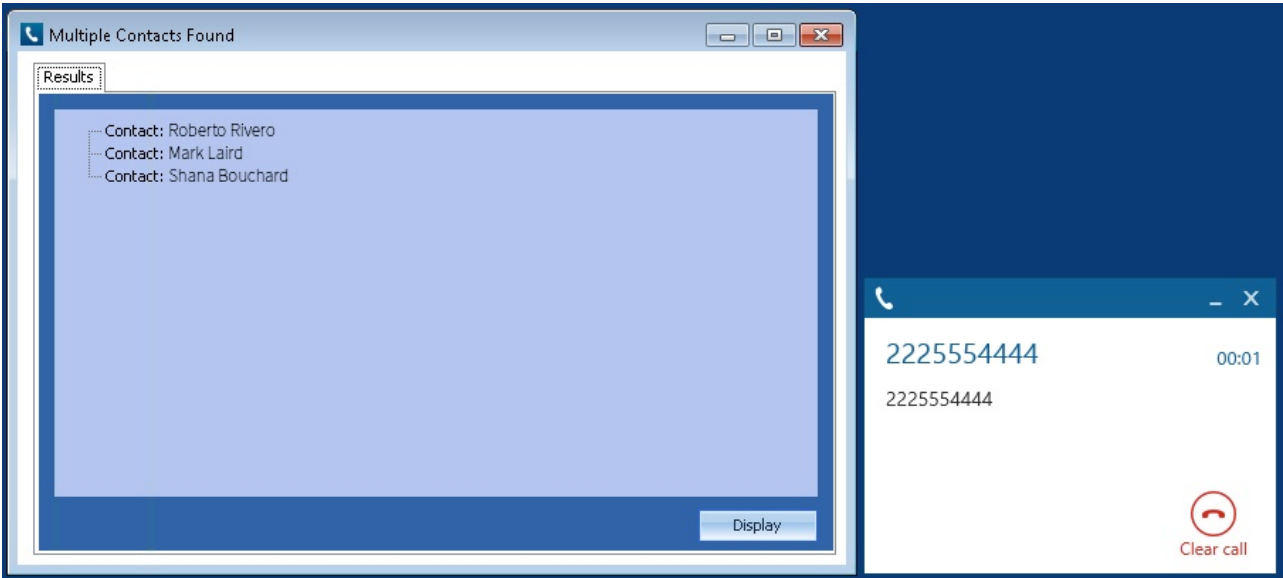
The correct entry can then be highlighted and then clicking on the *Display* button will open this card.

Entity and matching options

Configuration options are available on the plugin that allow the type of *cards* to be used in the searching to be set. For example it can be configured so that only the *Customer* or *Contact* Entities are searched. These options are set on the *Options* tab.

Selecting the *Create record on no match?* will create and open and new card of the type that has been selected.
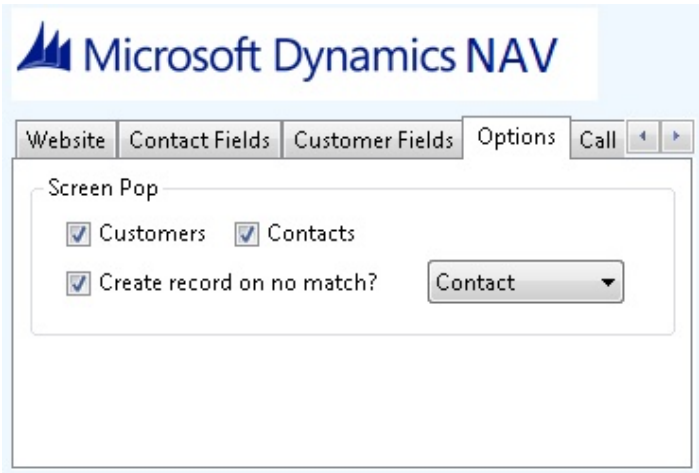
If no match is found then no records will be displayed.

The Web client supports creating a blank contact if there is no match on a call, however, the RTC client does not.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact* or *Customer* cards individually. By default the common telephone number fields are listed on the *Contact Fields* and *Customer Fields* tab.

These are the default field names and may be different if they have been customised. Contact your Microsoft Dynamics NAV administrator for details.

Contacts

Field Description	Field name	Enabled?

Phone Number	Phone No_	✅
Mobile Phone Number	Mobile Phone No_	✅
Fax Number	Fax No_	✅
Telex Number	Telex No_	✅
Pager Number	Pager	✅

Customers

Field Description	Field name	Enabled?
Phone Number	Phone No_	✅

Telephone number formats

Microsoft Dynamics NAV does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

Microsoft Dynamics NAV stores the country code and area code parts of each telephone number separately from the main number. From the *Formats* tab the country and area codes can be set to be appended to the telephone number when a search is made.

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.

> 📋 Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

> 📋 This field name must be the same with both *Contacts* and *Customers*.
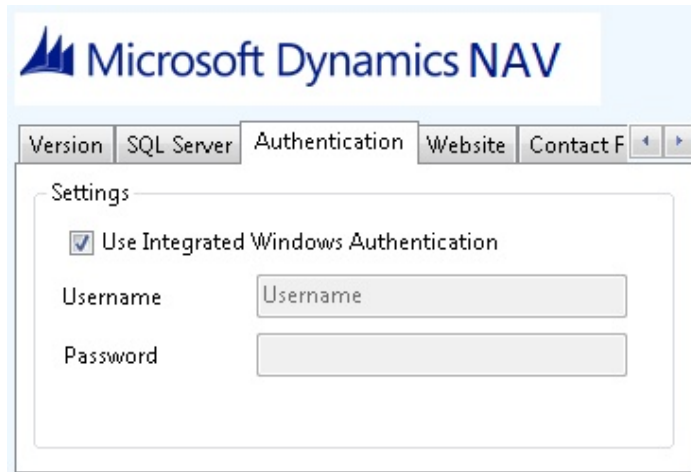
Configuration

The integration needs to be configured for the correct version of Microsoft Dynamics NAV that is running.

From the *Version* tab select the relevant entry from the drop down list. Then select the correct *Server Type* for the type of NAV server that will be used, this can either be *SQL Server* or *Navision* and depends the on the version of the NAV selected.

Authentication

The *Authentication* tab enables the security credentials used to access Microsoft Dynamics NAV to be configured. Select the *Use Integrated Windows Authentication* option if the username, password and domain details from user who is logged on the computer will be used.
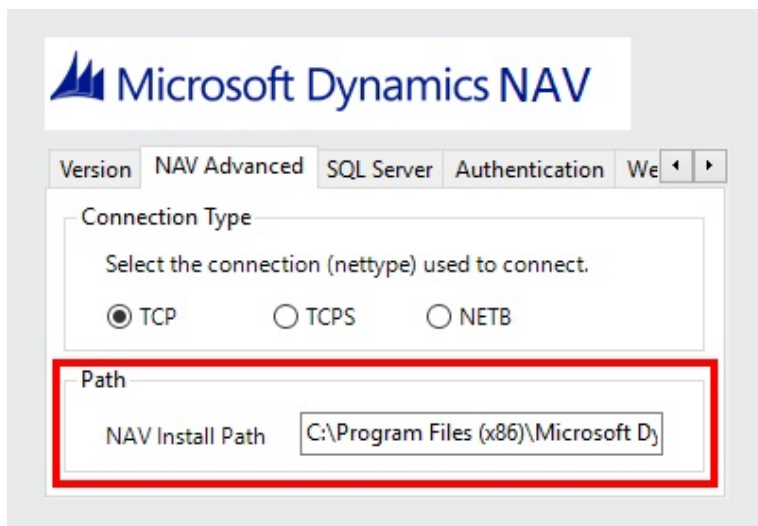
Depending on the configuration of Microsoft Dynamics NAV and how it is accessed will determine what options are required. For example if a different user account is used to access NAV than what is currently logged into the computer then they will need to be manually entered.

Advanced

You may need to edit the default path to Dynamics NAV in the Phone Manager plugin when using Phone Manager in the following scenarios
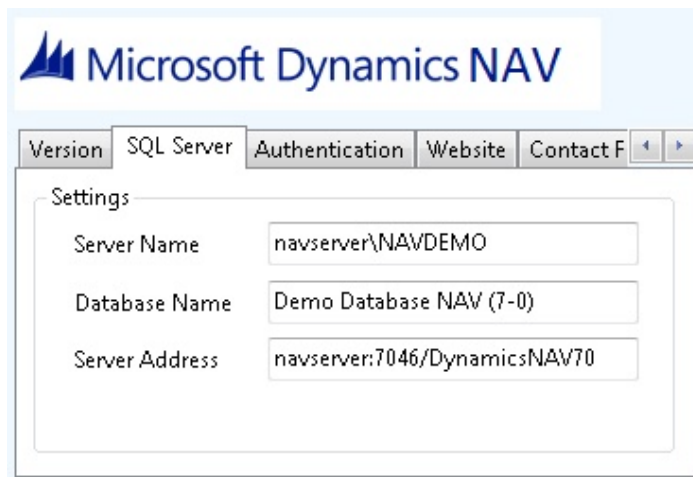
- Phone Manager is running on a 32 Bit PC
- Phone Manager is running on a 64 Bit PC and using a 64 Bit version of the Dynamics NAV Client
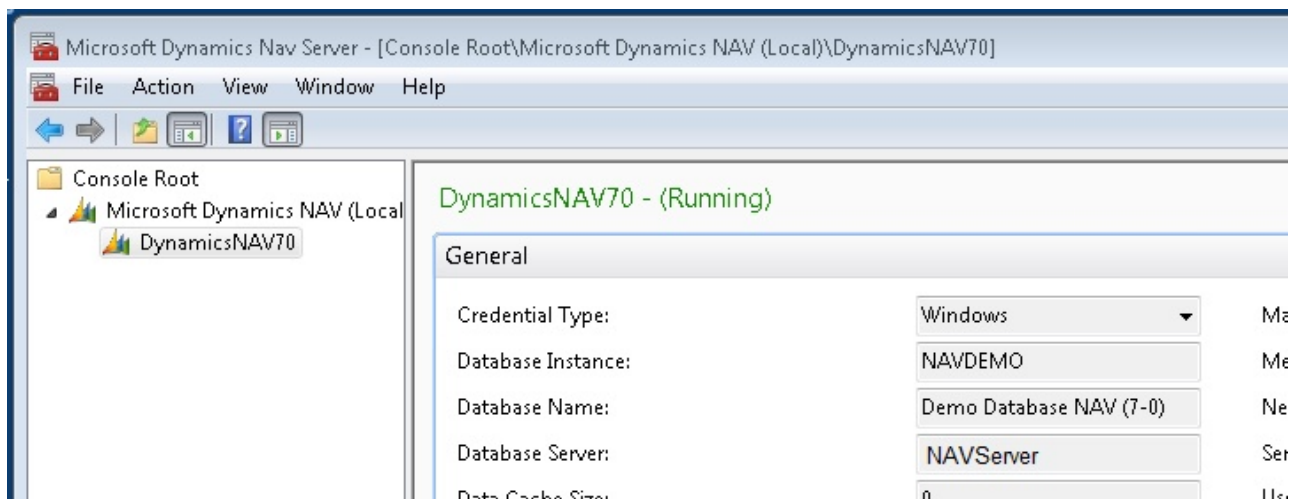

SQL Server connection

If the *Server Type* has been configured as *SQL Server* then the connection details for the SQL Server needs to be entered.

The *Server Name* is the hostname of the SQL Server database, this should also contain any instance names if been used, for example:
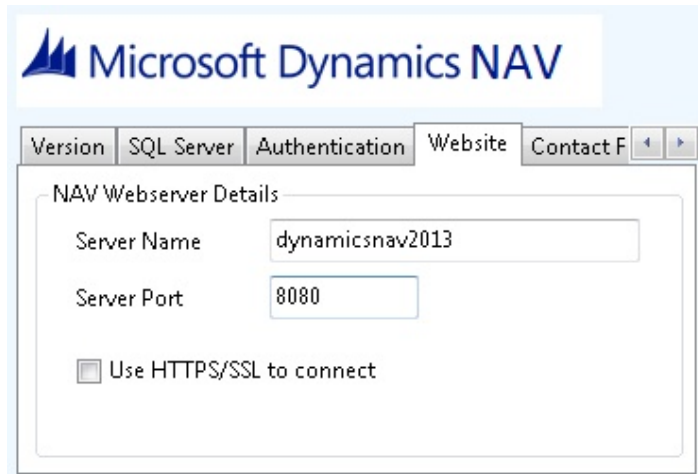
- navserver\NAVDEMO

This will connect to the *NAVDEMO* database instance on the server with the hostname of *navserver*. This correct value for this can be found using the *Microsoft Dynamics NAV Administration* tool.

The *Database Name* option is the name of the SQL Server database to connect to and can also be found using the *Microsoft Dynamics NAV Administration* tool.

Web server

The *Website* tab enables the web server details to be configured for the Microsoft Dynamics NAV Web client connection.

Enter the *Server Name* of the Microsoft Dynamics NAV web server and the *Server Port* to connect with, the default is 8080. If the connection to the web server is using a secure HTTP connection then check the *User HTTPS/SSL to connect* option.

7   Microsoft Internet Explorer

Overview

This describes the features that are available when integrating with Microsoft Internet Explorer.

Supported Versions

| Version	Supported
v9	✅
v10	✅ [1]
v11	✅ [1]

[1] Metro style not supported

Features

Integration with Microsoft Internet Explorer supports the features listed below:

- Screen pop

Screen pop

Microsoft Internet Explorer can be screen popped directly when an incoming call is received or an outgoing call is made and the call detail information can then be used to embed into the URL. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin was configured to screen pop using the URL "http://www.google.co.uk/search?q=%OutsideNumber%" and this then replaced the placeholder *%OutsideNumber%* with the outside number - for incoming calls this is the caller id.
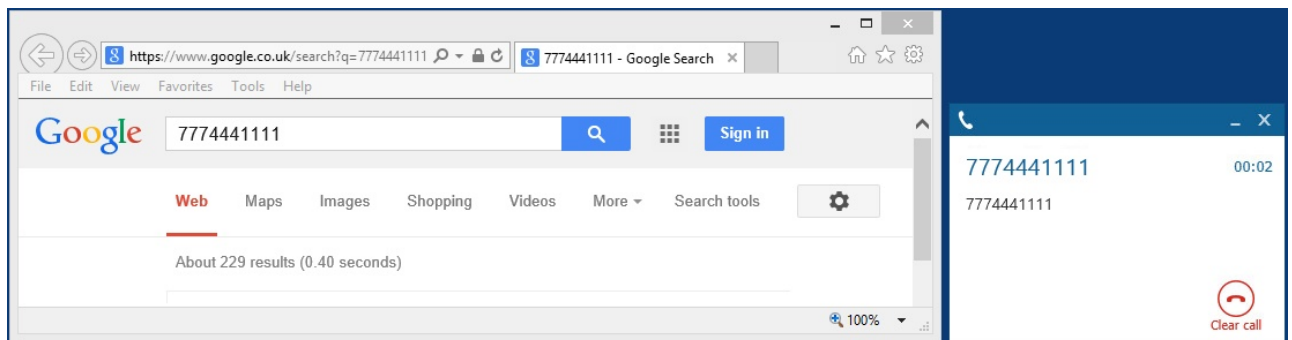
Settings

The configuration options for the plugin on the *Settings* tab allow the URL configuration options to be set.
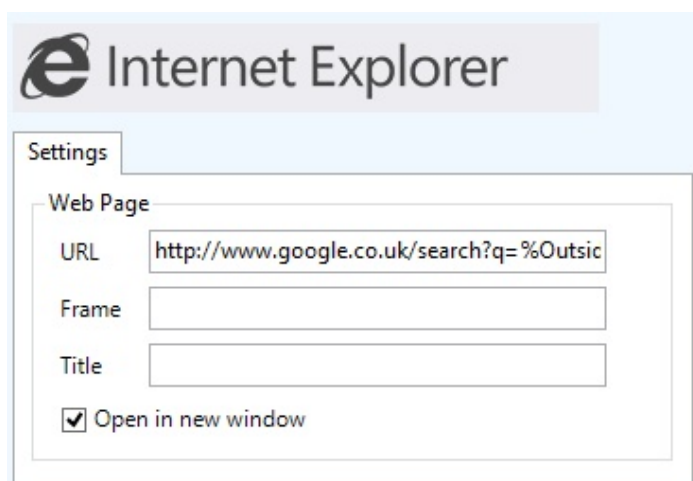
URL: This is the URL that will be popped. This can include any of the supported placeholders listed below.

Frame: The plugin can update a specific web frame with the configured URL, enter the name of the frame here.

Title: The plugin can update a web page that is currently open, enter the HTML title of the page here.

Open in new window: Enable this option to open a new Microsoft Internet Explorer window if there is not one open or if there is one open the create a new tab for each pop.

Placeholders

The list of supported place holders are shown below. These should be enclosed in % chars in the URL configuration.

Detail	Description
CallID	This is a variable-length string of characters (0-9, @, #,*, P, F, or X) the phone system assigns to each call. This ID serves as a reference identifier so that multiple simultaneous calls can be tracked through the system. The same ID is assigned to a call until the call is terminated, even if the call transfers between devices. Maximum length is currently seven characters.
OutsideNumber	The caller ID or dialled number.
ActualCLI	The unformatted caller ID or dialled number received directly from the PBX.
DDI	The inbound DDI/DID number.
DDI4	The last 4 digits of the inbound DDI/DID number.
DDIName	The DNIS associated with the DDI/DID number.
AccountCode	The last account code that was entered against the call.
Extension	The extension number associated with Phone Manager.
AgentID	The agent id number associated with Phone Manager.
Trunk	The outside trunk number that the call used.
SpeedDialName	The system speed dial name associated with the outside number.
HuntGroup	The hunt group that the call came in on.
HuntGroupName	The name of the hunt group that the call came in on.
Display	The DNIS or DDI/DID outside number associated with the trunk used for

	the call (i.e. was is normally shown on the top line of the keyset display).
TransferredFrom	The number of the device the call was transferred from.
TransferredFromName	The name of the device the call was transferred from.
LastRedirectionExtension	The number of the last device that redirected (forwarded, deflected, transferred, or recalled) the call, if applicable; otherwise, this is blank.
LastRedirectionExtensionName	The name of the last device that redirected (forwarded, deflected, transferred, or recalled) the call, if applicable; otherwise, this is blank.
TransferringExtension	The number of the device that the call was transferred to the. This may be blank if the transferred call is a conference call.
TransferringExtensionDescription	The name of the device that the call was transferred to the. This may be blank if the transferred call is a conference call.
ContactField1	The contact field 1 match for the matching contact record.
ContactField2	The contact field 2 match for the matching contact record.
ContactField3	The contact field 3 match for the matching contact record.
ContactField4	The contact field 4 match for the matching contact record.
ContactField5	The contact field 5 match for the matching contact record.
ContactField6	The contact field 6 match for the matching contact record.
ContactField7	The contact field 7 match for the matching contact record.
ContactField8	The contact field 8 match for the matching contact record.
ContactField9	The contact field 9 match for the matching contact record.
ContactField10	The contact field 10 match for the matching contact record.
CallRecorderRecID	The call recording record ID that can be used to identify the specific recording for this call.
CallRecorderServerID	The call recording server ID that the call was recorded on for this call.
DiallerCampaign	The name of the Phone Manager Outbound campaign if this is a dialler call.
DiallerField1	The Phone Manager Outbound dialler field 1 for this campaign record if this is a dialler call.
DiallerField2	The Phone Manager Outbound dialler field 2 for this campaign record if this is a dialler call.
DiallerField3	The Phone Manager Outbound dialler field 3 for this campaign record if this is a dialler call.
DiallerField4	The Phone Manager Outbound dialler field 4 for this campaign record if this is a dialler call.
DiallerField5	The Phone Manager Outbound dialler field 5 for this campaign record if this is a dialler call.
DiallerField6	The Phone Manager Outbound dialler field 6 for this campaign record if this is a dialler call.
DiallerField7	The Phone Manager Outbound dialler field 7 for this campaign record if this is a dialler call.
DiallerField8	The Phone Manager Outbound dialler field 8 for this campaign record if

	this is a dialler call.
DiallerField9	The Phone Manager Outbound dialler field 9 for this campaign record if this is a dialler call.
DiallerField10	The Phone Manager Outbound dialler field 10 for this campaign record if this is a dialler call.

8   Microsoft Office 365

Overview

This document describes the features that are available when integrating Phone Manager with Office 365©.

Supported Versions

Office 365© is an online product and has no concept of a version numbering scheme, Phone Manager integration was tested against the version running in November 2015.

Features

Integration with Microsoft© Office 365© supports the features listed below:

- Screen pop for contacts
- Calendar / DND Synchronisation
- Call History Entry

Screen pop for contacts

Office 365© personal contacts can be screen popped when an incoming call is received using the caller id from the inbound call or the dialled number on an outbound call. For example, an inbound call is received from 07718402534, if a contact exists then it is displayed through the users default web browser:

If multiple matches are found then the Multiple Contact Found dialog is shown.
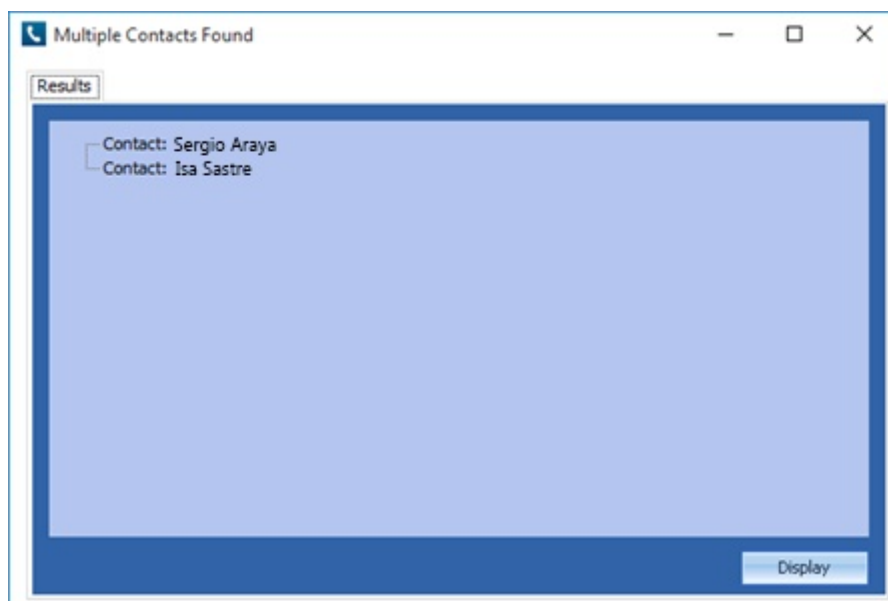
When searching all the telephone fields with a contact supported by Office 365© are searched for a matching record. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 being searched for.

UK & International Telephone Formats			
08001831234	+44 (0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234
0800 1831234	0800-1831234	(0800)1831234	(0800)-1831234
(080)018-31234	0800 183 1234		

The default formats for the US are shown below. This is based on the number 9876543210 being searched for.

US Telephone Formats			
9876543210	19876543210	987-654-3210	1-987-654-3210
987.654.3210	1-987.654.3210	(987) 654-3210	1(987) 654-3210
+1 (987) 654-3210	(987)654-3210		

Calendar & DND synchronisation

The personal calendar within Office 365© can be synchronised with the DND status of the extension of the User. For example, when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the subject of the appointment. When the appointment ends, the extension will be automatically removed from DND.

Busy states The busy status of the appointment can be used to filter what type of appointments will be used to automatically change the DND status.

From the Busy Options tab check each entry to include this type of busy status.

CallHistory Entry

Phone Manager can work with the notes field within an Office 365© Contact and can have Phone call entries automatically created for calls made or received by the User when a match has been found to an entry in their Office 365© contacts. The contact to associate with this is found using the caller id received or dialled. If multiple matches are found then the Search Results window is shown as for the screen pop.

Configuration

The integration to Office 365© requires the users individual User Id and password.

There is also an option to show the default contacts page when there is no contact match:

There is also a 'Test' button which will test whether the configured user credentials are correct.

Multi-Factor Authentication

If multi-factor authentication has been enabled on a user's account, an 'Application Password' must be created for Phone Manager to use. Once created, the application password must be used along with the user's existing username.

9   Microsoft Outlook

Overview

This describes the features that are available when integrating with Microsoft© Outlook©.

Supported Versions

The following Microsoft© Outlook© versions are supported.

Version	Supported
Outlook© 2010 32bit	✅ [1]
Outlook© 2010 64bit	✅ [1]
Outlook© 2013 32bit	✅ [1]
Outlook© 2013 64bit	✅ [1]
Outlook© 2016 32bit	✅ [1]
Outlook© 2016 64bit	✅ [1]
Business Contact Manager for Outlook©	✅

[1] Desktop client for Microsoft© Windows

Features

Integration with Microsoft© Outlook© supports the features listed below:

- Directory import for contacts
- Click to dial
- Meet-Me conference creation
- Screen pop for contacts
- Automatic journal entry
- Calendar & DND synchronisation
- Business Contact Manager for Outlook

Directory import for contacts

Users can enable their Outlook© personal contacts to be linked into Phone Manager. This enables the contact to be searched for using the *Home*, *Telephone* or *Mobile/Cell* numbers as well as the *first*, *middle*, *last* or *company name* fields directly from within Phone Manager. As there can be other types of contacts shown in the Phone Manager

contacts window, Outlook© contacts are shown with a icon next to them.
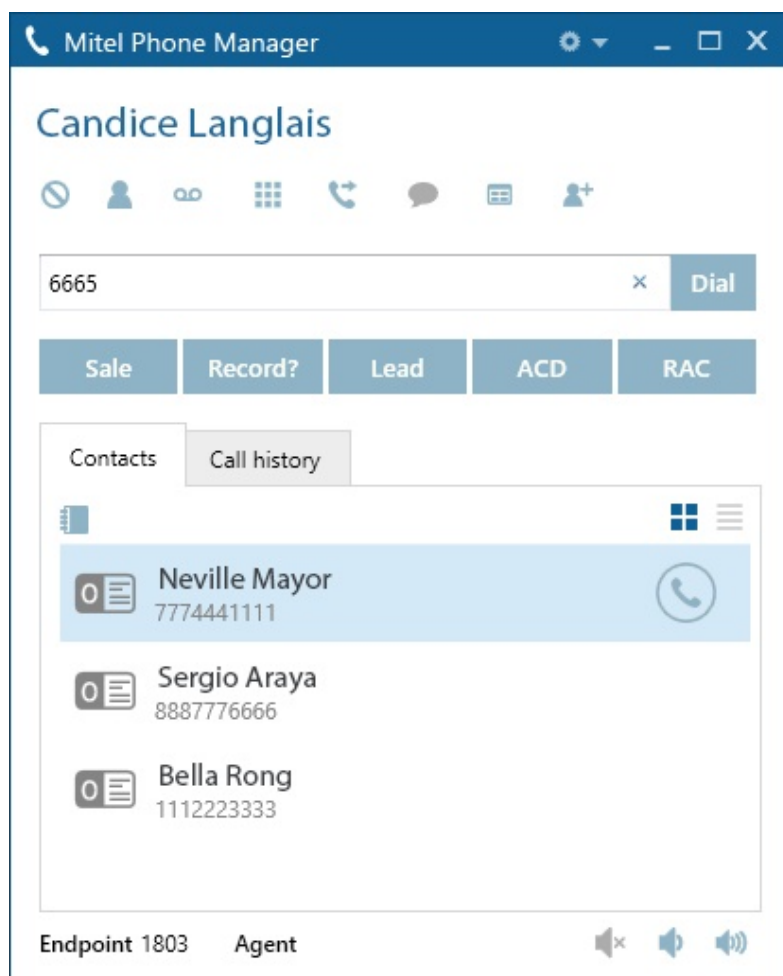
Once found they can then be dialled using any of the numbers associated with the contact. Clicking on the dial icon will call the main number but any number can be selected by right clicking and selecting the relevant number to call.
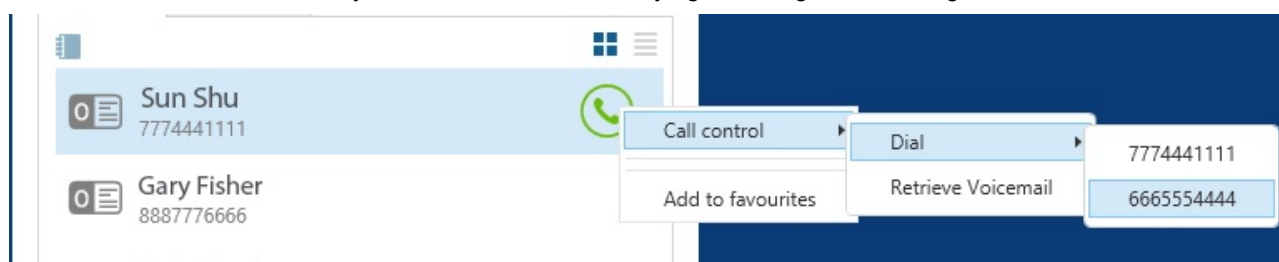
Frequently accessed contacts can be pinned to the Users favourites directory, by right clicking on the contact entry and selecting *Add to favourites*, so that they permanently appear on the contacts tab.

⚠ Only contacts in the users personal folder are available for directory searching and adding to favourites.

Click to dial

Calling a contact directly from Outlook© is supported when using the Phone Manager Outlook© Add-In. This is installed by default with each Phone Manager client and adds new entries to the contacts screen within Outlook©. When the contact list is open a User can right click on a contact and select the *Phone Manager* menu and then select the number to call.
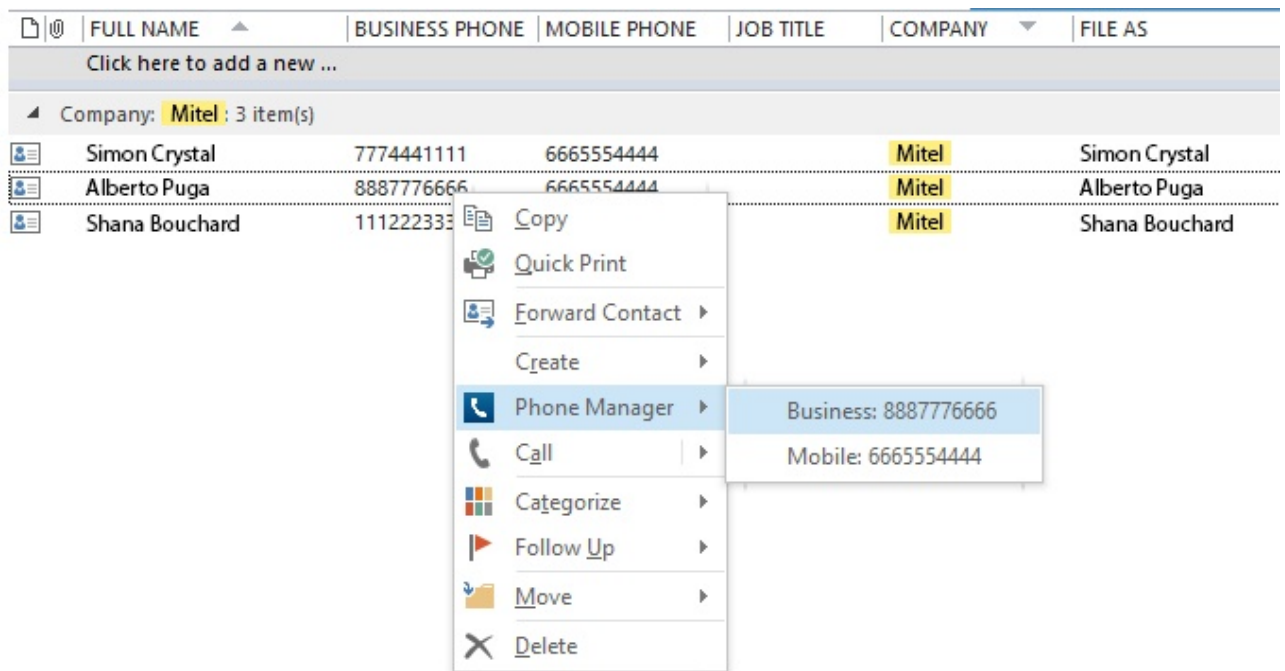
When in the contact list or contact details view at the top the ribbon bar can also be used. From the *Communicate* ribbon, select *More* and then *Phone Manager*.
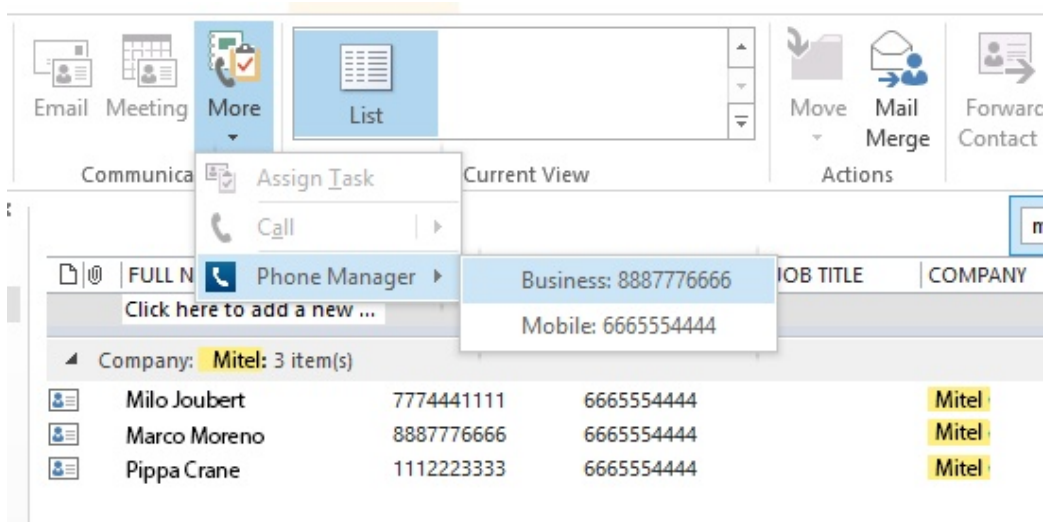
This requires Phone Manager to be running in the same Windows session as Outlook©.

Meet-Me conference creation

Creating a new Meet-Me conference appointment directly from Outlook© is supported when using the Phone Manager Outlook© Add-In. This is installed by default with each Phone Manager client and adds new entries to the calendar screen within Outlook©.
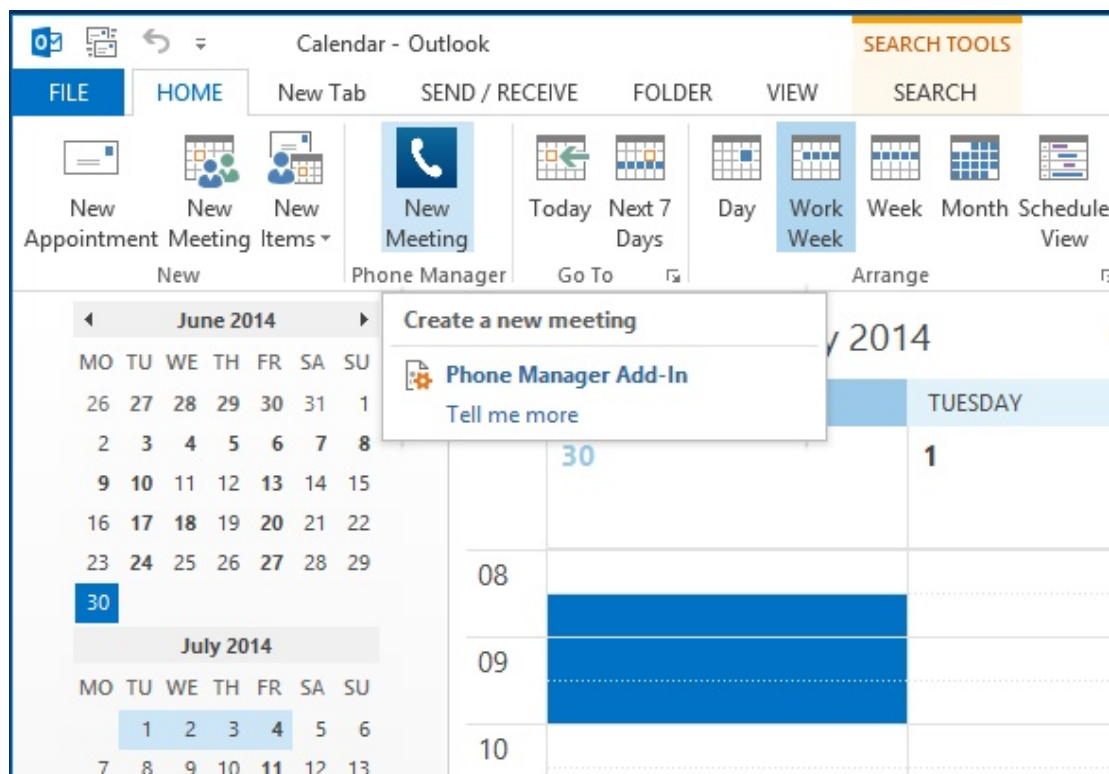
When selected, a new appointment is displayed that is pre populated with the telephone number and access code to dial into a Meet-Me conference.
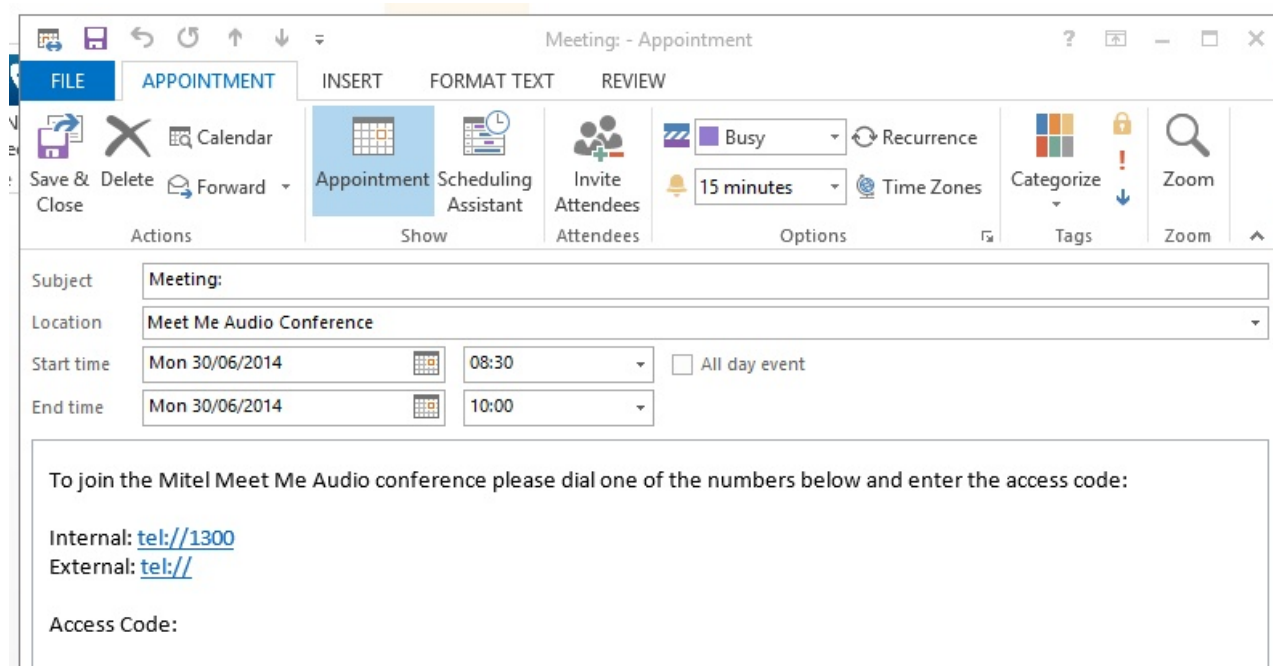
Screen pop for contacts

The Users local or public contacts can be screen popped directly within Outlook© when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin has then performed a search on the Outlook© contacts to find any records that have matching telephone numbers. A match was found and the Outlook© contact records was automatically displayed.
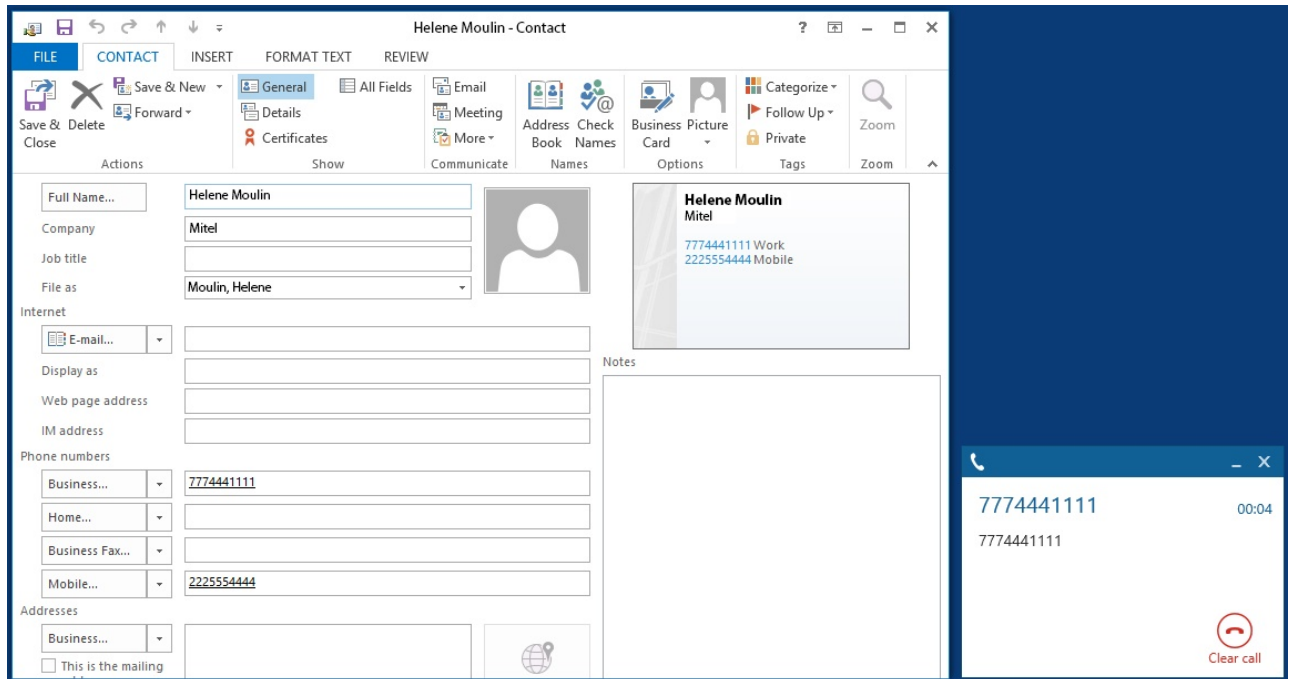
If multiple matches are found then the *Search Results* window is shown and enables the User to select the correct contact to be displayed. For example a call is made to 222555444 and this has found three contacts that have this telephone number.
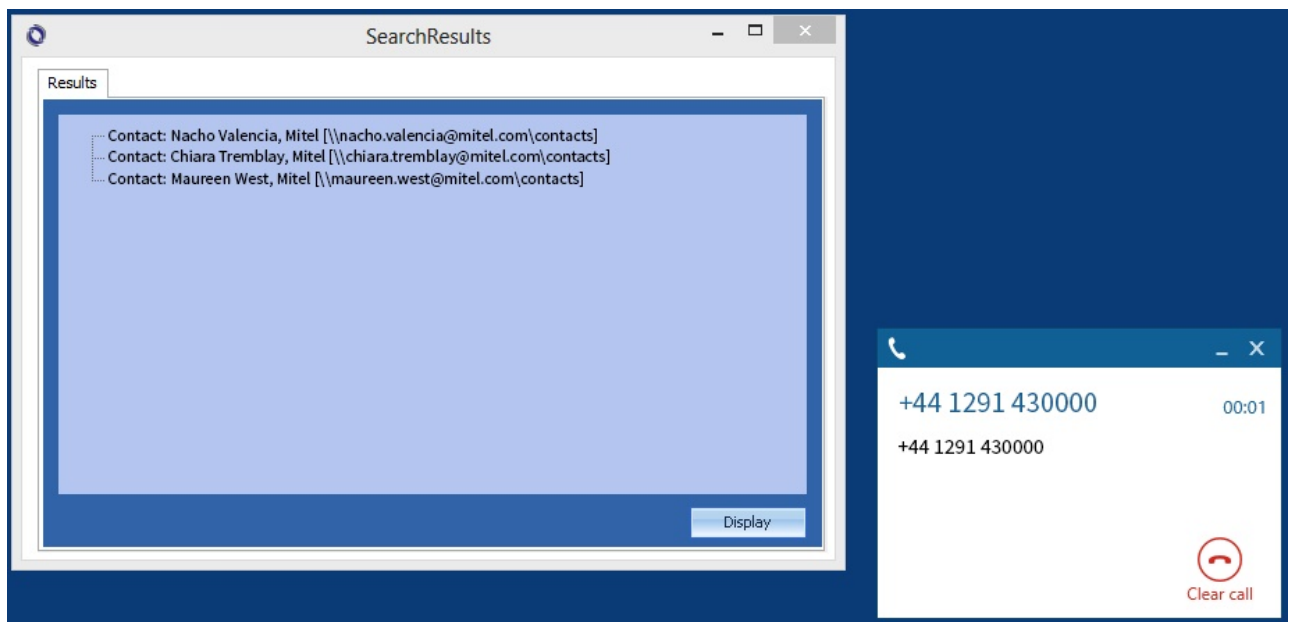
Double clicking on the relevant contact or highlighting and clicking on the *Display* button will show the required Outlook© contact.

Contact folders

The Users local Outlook© contact folder is used when trying to find any matching contacts (**Default**). Additional Outlook© Public folders can be added to the search from the *Contacts* tab in the configuration.

To enable public folders to be searched check the *Search Public Contact Folders* option and then click on the *Refresh* button. This will list all of the available public folders for this User and then the appropriate options can then be selected.

⚠ Using public folder searching may require additional time to perform the search and could delay any matches

from being found.

Contact fields

The telephone number fields that are to be searched can be configured for the contacts from the *Fields* tab in the configuration.
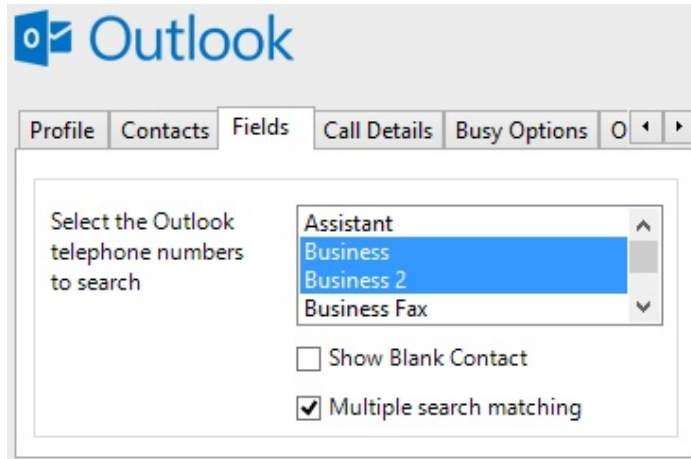
The list shows all of the available telephone number fields and if they are enabled for searched by default. These are the default field names and descriptions and may be different from the ones shown in Outlook©.

Outlook Description	Outlook Field Name	Enabled?
Assistant	AssistantTelephoneNumber	❌
Business	BusinessTelephoneNumber	✅
Business 2	Business2TelephoneNumber	✅
Business Fax	BusinessFaxNumber	❌
Callback	CallbackTelephoneNumber	❌
Car	CarTelephoneNumber	❌
Company	CompanyMainTelephoneNumber	❌
Home	HomeTelephoneNumber	✅
Home 2	Home2TelephoneNumber	✅
Home Fax	HomeFaxNumber	❌
ISDN	ISDNNumber	❌
Mobile	MobileTelephoneNumber	✅
Other Fax	OtherFaxNumber	❌
Pager	PagerNumber	❌
Primary	PrimaryTelephoneNumber	❌
Radio	RadioTelephoneNumber	❌
Telex	TelexNumber	❌
TTY/TDD	TTYTDDTelephoneNumber	❌

Unmatched Contacts

If no matches are found then a blank contact can be shown with the outside number pre populated into the *Business* telephone field. Check the *Show Blank Contact* option to enable this, or uncheck (**Default**) to not do anything when no match is found to a call.

Multiple search matching

When more than one contact is matched and the *Multiple search matching* option is checked (**Default**) the *Search Results* window is displayed to the User to allow them to select the relevant contact. If this option is not checked then the first match found will be used and any further searching will be stopped. This can be useful when using public folders to reduce the time taken to perform the search.

Telephone number formats

Outlook© does not provide a standard format for storing telephone numbers within the system by default. Depending on the region where the client is running then different formats will be used:

UK & International Telephone Formats			
08001831234	+44 (0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234
0800 1831234	0800-1831234	(0800)1831234	(0800)-1831234
(080)018-31234	0800 183 1234		

US Telephone Formats			
9876543210	19876543210	987-654-3210	1-987-654-3210
987.654.3210	1-987.654.3210	(987) 654-3210	1(987) 654-3210
+1 (987) 654-3210	(987)654-3210		

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search depending on the call direction, but other call details can configured. There are options for the direct dial number (DDI/DID) or the direct dial name (DNIS).
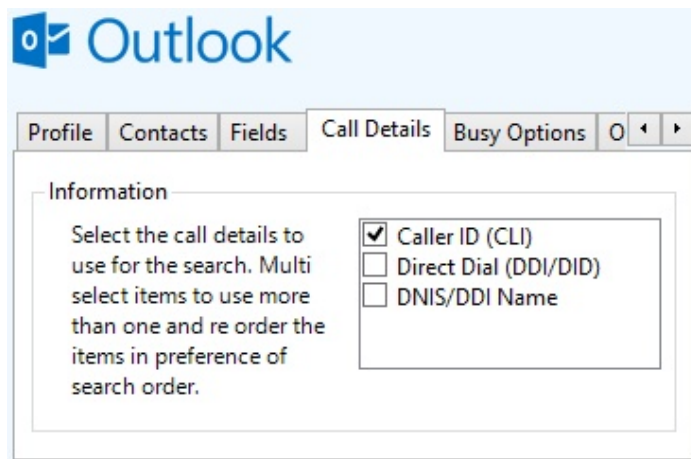
Automatic journal entry

Phone Manager can work with the Journal within Outlook© and can have *Phone call* entries automatically created for calls made or received by the User when a match has been found to an entry in their Outlook© contacts. The contact to associate with this is found using the caller id received or dialled. If multiple matches are found then the *Search Results* window is shown as for the screen pop.

The body of the journal item is populated with the information below and the start and duration of the call.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.

Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Contact	The Outlook© contact name in the *last name, first name* format.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Calendar & DND synchronisation

The calendar within Outlook© can be synchronised with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the subject of the appointment. When the appointment ends, the extension will be automatically removed from DND.

Busy states

The busy status of the appointment can be used to filter what type of appointments will be used to automatically change the DND status.
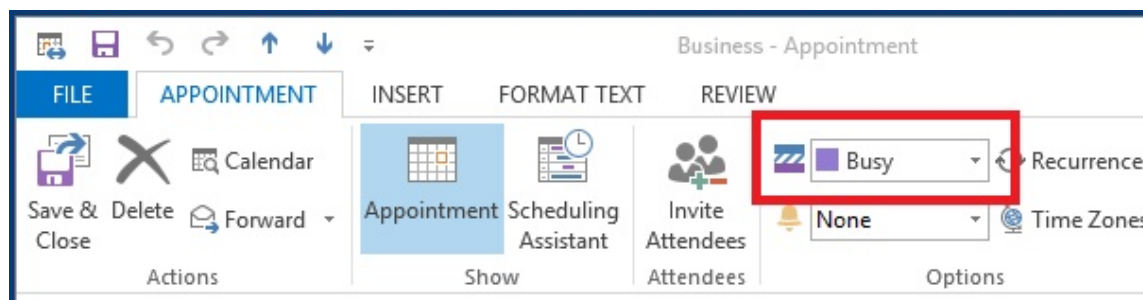
From the *Busy Options* tab check each entry to include this type of busy status.
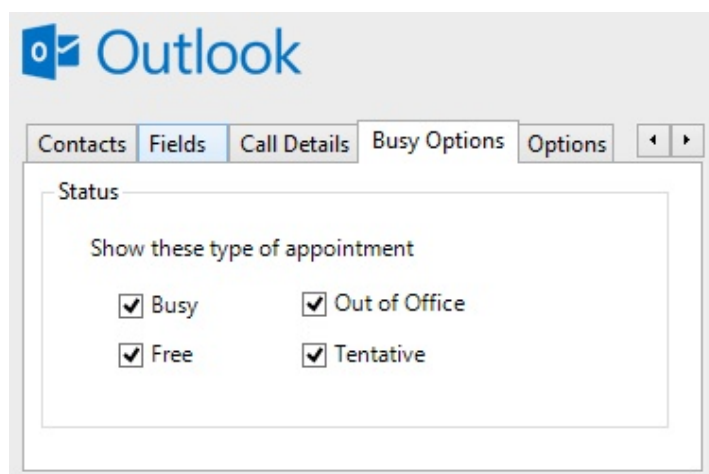
Sensitivity options

The sensitivity type of the appointment can be used to filter what type of appointments will be used to automatically change the DND status. From the *Options* tab check each of the *Sensitivity Options* to include this type.
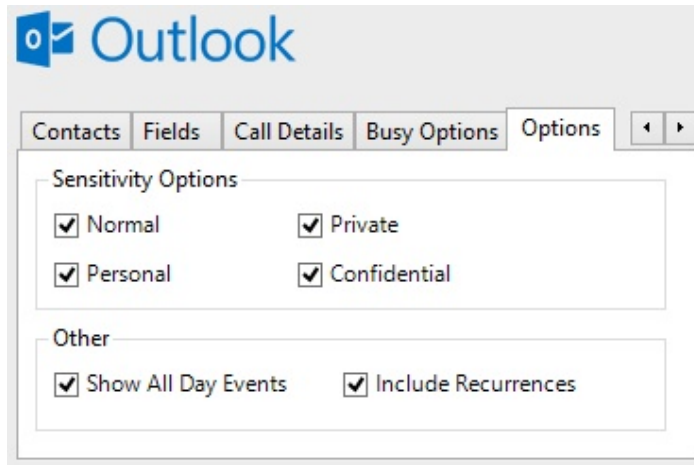
Other options

There are other options that can be used to filter the type of appointments to include. Check the *Show All Day Events* include all day events. Check the *Include Recurrences* to include appointments that are recurring.

Business Contact Manager for Outlook

Phone Manager supports integration with contacts stored within Business Contact Manager for Outlook in the same way as for contacts that are stored within Public Folders.

⚠ Business Contact Manager contacts are not available for directory searching and adding to favourites.

10   NetSuite CRM+

Overview

This describes the features that are available when integrating with NetSuite CRM+ hosted in the Cloud.

Supported Versions

The integration uses NetSuite v2014.1 web services. Although NetSuite tries to maintain backwards compatibility when they upgrade their cloud platform this is never guaranteed. This version of the plugin has been tested on the latest version that was available upon release.

Features

Integration with NetSuite CRM+ supports the features listed below:

- Click to dial
- Screen pop for customer and contacts records
- Automatic call history entry

Click to dial

When a record is displayed any telephone numbers will be shown as hyperlinks and clicking the link will call the number selected.
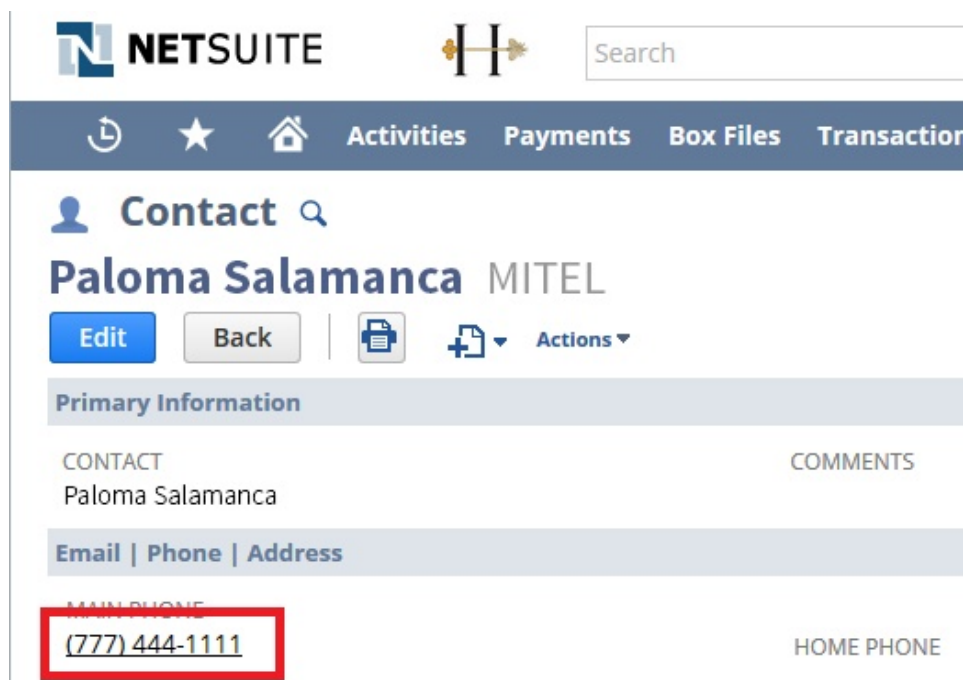
See the Click to dial configuration section for details.

> 📄 This requires Phone Manager to be running in the same Windows session as NetSuite.

> 📄 If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

Screen pop

CRM *Contact* and/or *Customer* records can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any

matching records that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* record was found and the record was automatically displayed using the Users default browser.

If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found 2 matching *Contact* records and 1 matching *Customer* record that have this telephone number.
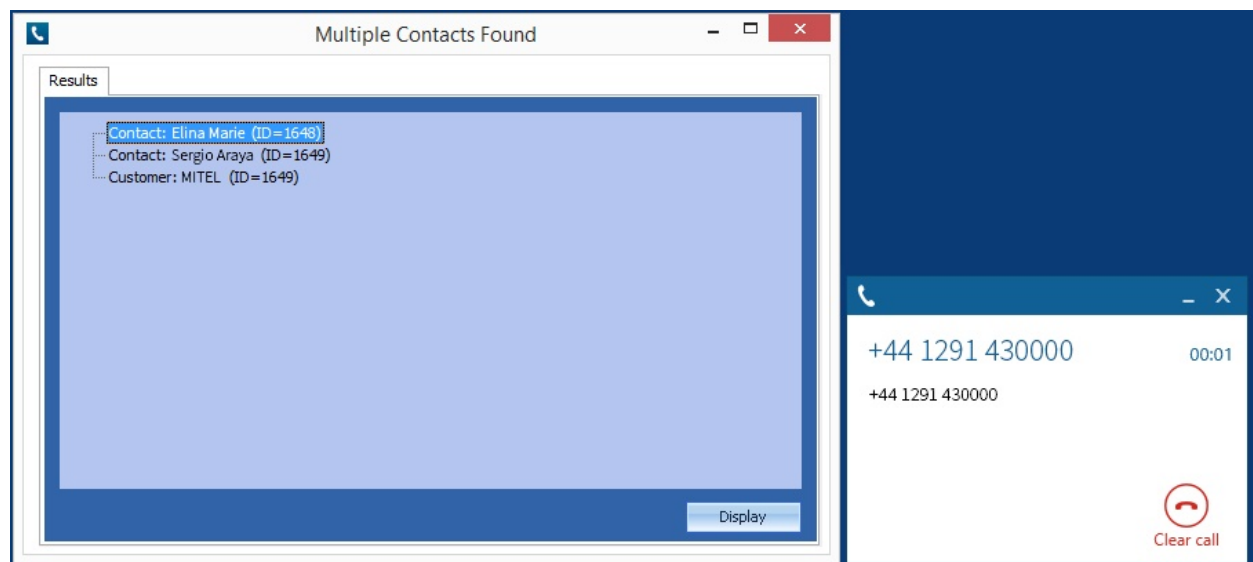
The correct record can then be highlighted and then clicking on the *Display* button or double clicking the entry will open this record.

> The plugin will only search for records that are in the *Active* state. If any records have been marked as *In Active* then they will not be displayed.

Record and matching options

Configuration options are available on the plugin that allow the type of *Records* to be used in the searching to be set. For example it can be configured so that only the *Contact* records are searched. These options are set on the *Options* tab.

If no match is found when searching than a blank form can be automatically displayed to create a new record. The record type, *Contact* or *Customer* that is created can be set here.

Automatic call history entry
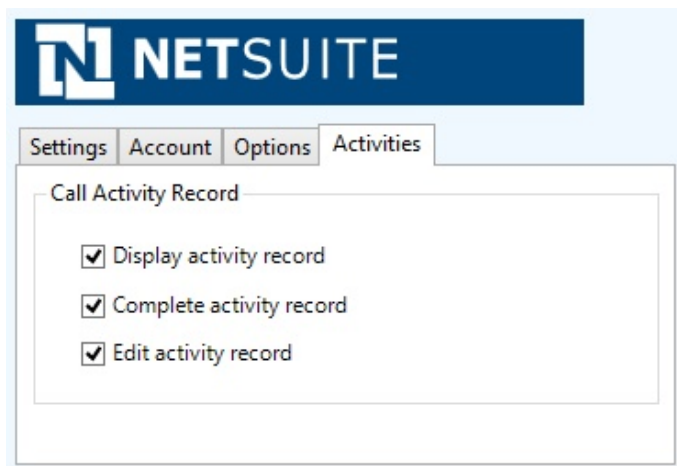
The plugin supports the ability to be able to automatically create and display a NetSuite Phone Call Activity entity. The record to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping.

⚠ For the Call History entry to be created, the 'Company' field needs to be populated in the target contact.

The Activity record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.

Display activity record: This will display the *Activity* form, if this is not set then the record will be created without the user seeing the form.

Complete activity record: This will set the status of the *Activity* to be Completed.
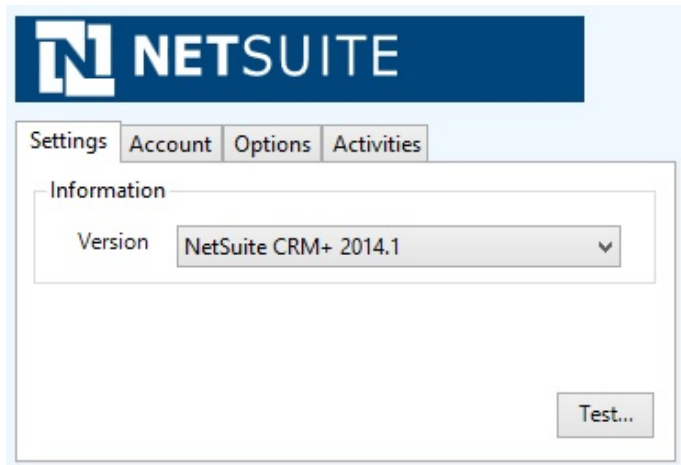
Edit activity record: This will open the *Activity* record in edit mode.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Dynamics CRM.

Settings and versions

The supported version of NetSuite can be seen on the *Settings* tab.
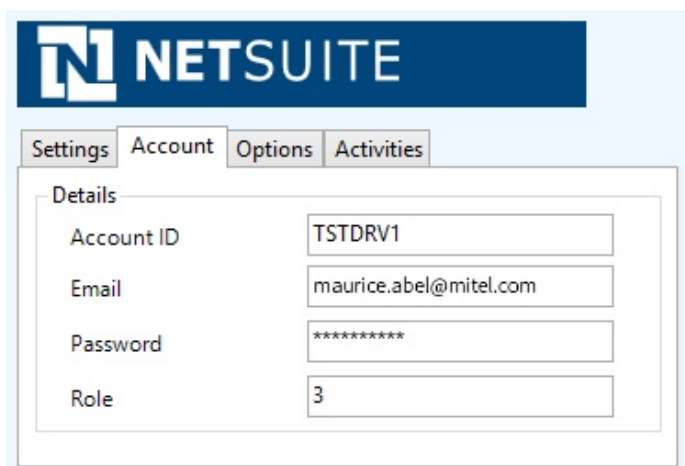
Account details

The specific account details need to be set on the *Account* tab.

Account ID: This is the NetSuite CRM Account ID. This can be found from the within NetSuite. From the Setup menu select Integration -> Manage Integration -> Web Services Preferences .

Email: The email account used to login to NetSuite for this user.

Password: The password used to access NetSuite for this user.

Role: The role to use to connect to NetSuite for this user. This needs to be to the Internal ID of the specific role. To find the relevant ID, set the Show Internal IDs preference and the internal ID can be found by going to Setup > Users/Roles > Manage Roles.

NetSuite Configuration

Web services

The integration uses the NetSuite CRM Web Services for the screen pop and phone call activity features. The Web Services are enabled from within NetSuite and can only be performed by a NetSuite Administrator.

Select *Setup -> Company -> Enable Features*. In the *SuiteCloud* tab, scroll down to the *SuiteTalk (Web Services)* section and enable the *Web Services* check box.

Each User that is connecting to NetSuite needs to have the Web Services permission set against their role. To assign the Web Services permission to a role:
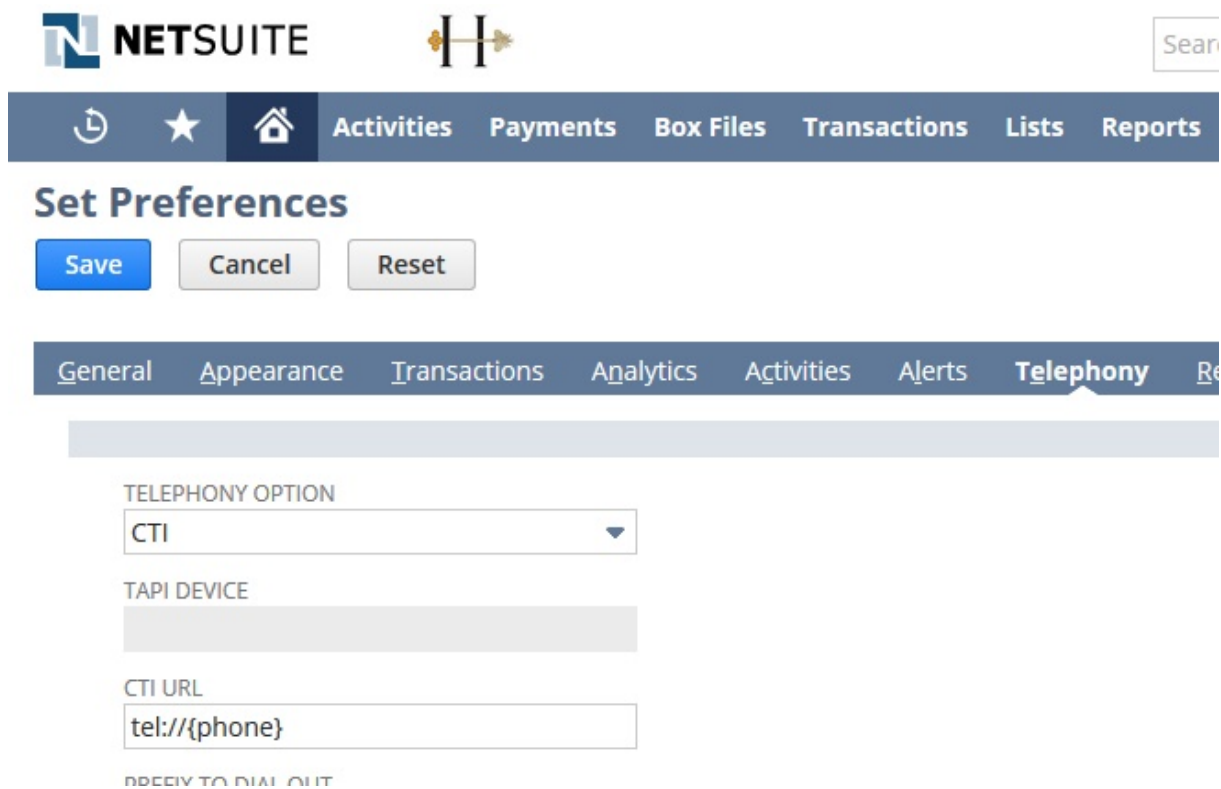
1. Select *Setup -> Users/Roles -> Manage Roles*.
2. Click either *Edit* or *Customize* next to the role.
3. From the *Permissions* tab select *Setup*.
4. Add the *Web Service*s permission with the *Full* level.

Click to dial

To enable the click to dial feature from the telephony integration option needs to be enabled.

1. Select *Setup -> Company -> Enable Features*.
2. In the *SuiteCloud* tab, scroll down to the *Integration (Add-ons)* section
3. Enable the *Telephony Integration* check box.
4. For each user, select *Settings -> Set Preferences*.
5. Select the *Telephony* tab.
6. Set the *Telephony Option* to be **CTI**.

7. Enter "tel://{phone}" into the *CTI URL* section.

11   Sage CRM

Overview

This describes the features that are available when integrating with Sage CRM.

Supported Versions

The following Sage CRM versions are supported.

Version	Supported
v5.7 - v7.0	✅
v7.1	✅
v7.2	✅
v7.3	✅

Editions	Supported
Sage CRM Professional Edition (Cloud)	✅
Sage CRM On-Premise Edition	✅
Sage CRM Essentials Edition (Cloud)	❌

Features

Integration with Sage CRM supports the features listed below:

- Screen pop for contacts

Screen pop

CRM *Person*, *Company* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Person* entity was found and the record was automatically displayed using the Users default browser.
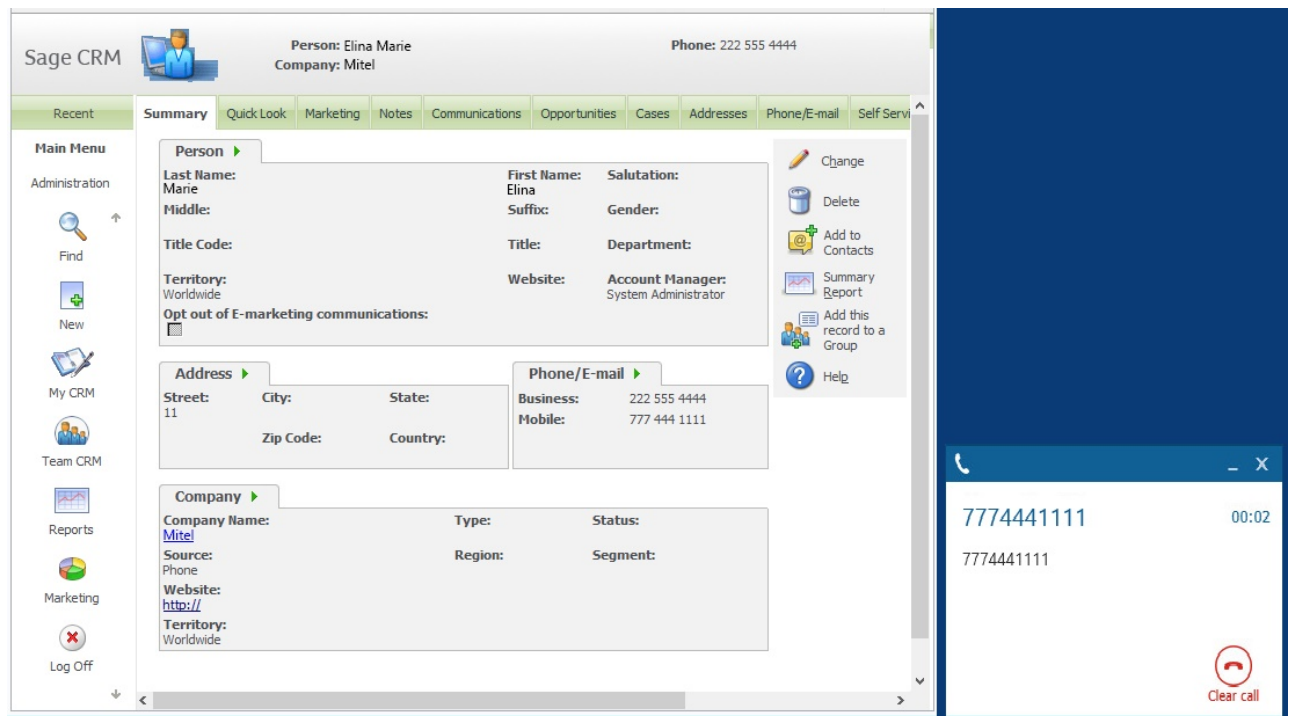
If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Person* entities that have this telephone number.
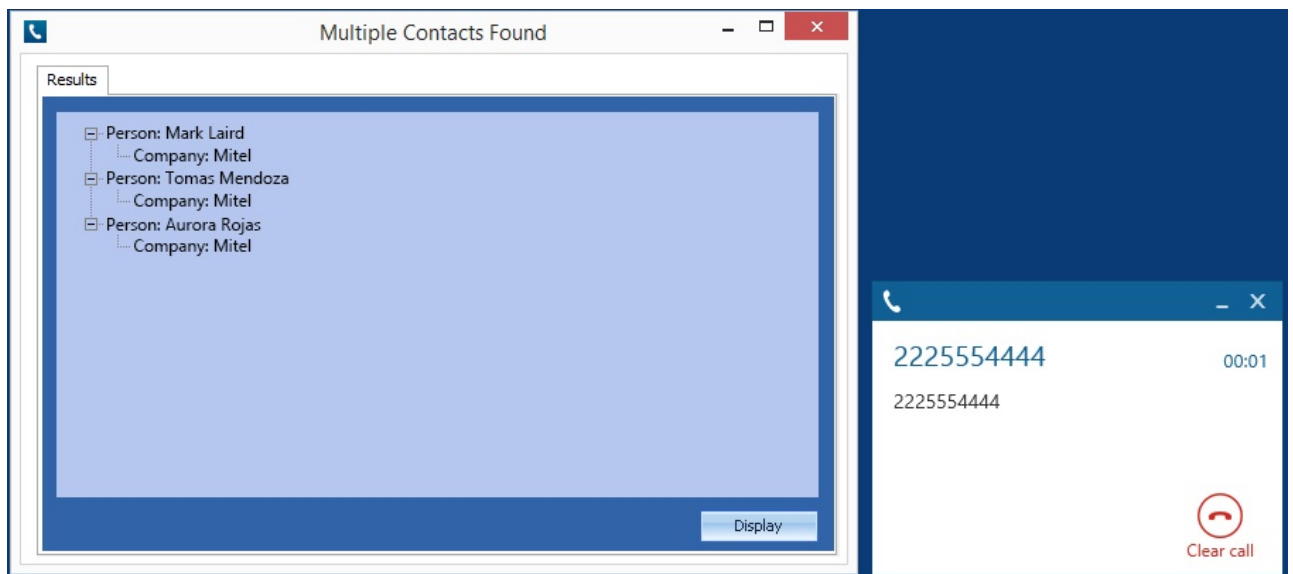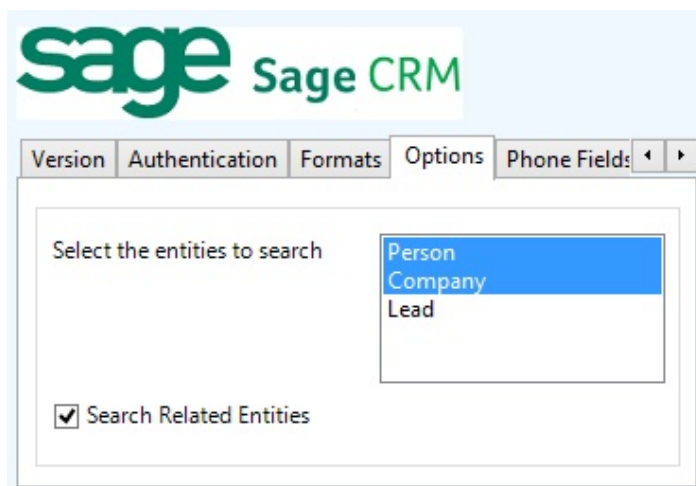
The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Person* and *Company* Entities are searched. These options are set on the *Options* tab.

Selecting the *Search Related Entities* option will enable any matching records that have a related entity to be displayed on the *Multiple Contacts Found* window.

📑 If no match is found then no records will be displayed.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Person*, *Company* or *Lead* Entities individually. By default the common telephone number fields are listed on the *Phone Fields* tab.

These are the default field names and may be different if they have been customised. Contact your Sage CRM administrator for details.

Contact Entities

Entity Type	Field name	Enabled?
Person	Business	✅
Person	Fax	✅
Person	Home	✅
Person	Mobile	✅
Company	Business	✅
Lead	Person Phone	✅

Lead	Person Fax	✅
Lead	Alternate Phone	✅

Telephone number formats

Sage CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

Sage CRM stores the country code and area code parts of each telephone number separately from the main number. From the *Formats* tab the country and area codes can be set to be appended to the telephone number when a search is made.
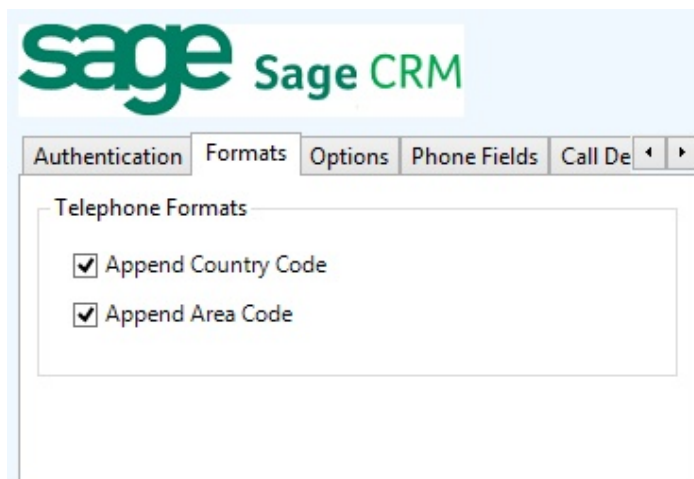
For example if the number, 01611234567 is stored within Sage CRM as:

- Country Code: 44
- Area Code: 0161
- Number: 1234567
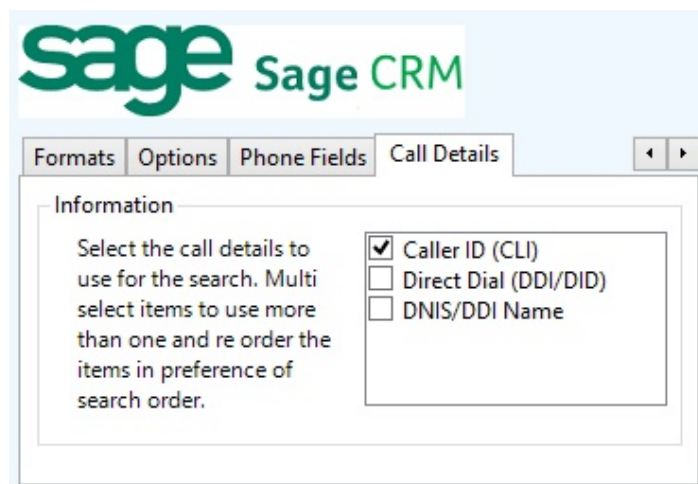
The following telephone numbers would be searched for:

- If the Append Country Code and Append Area Code are not set: 1234567
- If the Append Country Code is set and Append Area Code is not set: 441234567
- If the Append Country Code is not set and Append Area Code is set: 01611234567

- If both the Append Country Code and Append Area Code are set: 4401611234567

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.

📄 Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

Configuration

The integration needs to be configured for the correct version of Sage CRM that is running. From the *Version* tab select the relevant entry from the drop down list.

The authentication and server connection details to the CRM server need to be set on the *Authentication* tab.

A valid Sage CRM username and password that has the web service option enabled is required to be configured into the *Username* and *Password* fields. To enable a user for web services, from Sage CRM:

1. Select Administration -> Users -> Users
2. Select Change action button
3. In Security panel set Allow Web Service Access field to True

> Only one web service user can logon with the same ID at any given time. If a user tries to logon as another application, an error will be displayed informing the user that they should first log out. However, it is possible to logon to the desktop or from a device with the same ID while a Web Service application is running.

The plugin uses the Sage CRM web services to integrate and this needs to be enabled on the Sage CRM server. This can be enabled from within Sage CRM:

1. Select Administration -> System -> Web Services
2. Select Change action button
3. Check the enable web service option

The web service URL can then be configured into the *URL* section. For example if the server name is called *mycrmserver* then enter:

- http://mycrmserver/crm/eWare.dll/

Troubleshooting

When integrating with Sage CRM v7.1+ the plugin uses the PhoneLink table within Sage CRM and this needs to be made available through the Sage CRM web service. If this is not enabled this error will be shown in the log files:

```
System.Web.Services.Protocols.SoapHeaderException:
Request Failed. Entity 'phonelink' is not Web Service enabled.
```

To enable this follow this procedure:

1. Log in to Sage CRM SQL Server
2. Select Sage CRM database
3. Click on the New Query button
4. Run:
    - update Custom_Tables set bord_WebServiceTable='Y' where Bord_Caption ='phonelink'
5. Run the IISRESET command
6. Login to the Sage CRM system.

12 SalesForce

Overview

This describes the features that are available when integrating with SalesForce.

Supported Versions

The following SalesForce versions are supported.

Edition	Supported
Contact Manager	
Group	
Professional	£
Enterprise	
Performance	

£ - Additional SalesForce fees may apply

Features

Integration with SalesForce supports the features listed below:

- Screen pop for contacts
- Automatic call history entry

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesForce when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.

If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found one matching *Account* entity and three matching *Contact* entities that have this telephone number.

The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab

If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Search fields

The range of telephone numbers that are to be searched are not configurable. All SalesForce fields that are have the *phone* type will be used.

The format of the telephone number does not make any difference as any type of format is supported. The number dialled/received is used for the searching.

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a SalesForce Phone Task entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The Activity record is automatically created with the information relating to the call entered into the *Comments* field and the related entities are linked as shown.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.

Status: This allows the type of *Status* for the task to be configured. Valid options are: *Not Started*, *In Progress*, *Completed*, *Waiting on someone else*, *Deferred*.

Priority: This will set the priority of the Task to be *High*, *Normal* or *Low*.

Display activity record: If this is set then the Task will be displayed when it's created in a new browser window.

Use Start and End times only: If this is set then only the start and end time will be populated into the *Comments* section for a call history entry.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to SalesForce.

User authentication

The plugin requires a valid SalesForce username and password to be entered. These are the details that will be used for searching and creating history records. Ensure that the user has the appropriate permissions within SalesForce to do this. As a minimum they need to have the *API Enabled* flag set on their *Profile*.

Security

The Security tab enables the type of access and location of the Salesforce services to be set.

Server -> URL: This should be set to SalesForce server that your organisation uses. This can be found by looking at the URL that is displayed in the address bar of the web browser once you have logged into SalesForce.
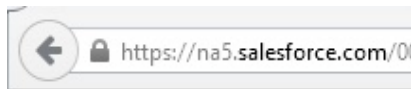
Token: Depending on the security configuration of SalesForce and how it is accessed will dictate what options are required. To connect to the SalesForce API requires that the public IP address that the user is connecting from is configured in the *Administration Setup -> Network Access* section under *Trusted IP Ranges.*

If this cannot be configured, for example if you have remote workers whose IP address changes all the time. Then the Security Token option will need to be enabled.

To create a Security Token from the *Personal Setup -> My Personal Information- > Reset My Security Token* section of Salesforce.com, select the *Reset Security Token* button. This will send an email to the associated user with their Security Token.

The email will contain the token and will look similar to the one shown below:

- y67lBpMdiBY02RkbDWqwhCEX

This value then needs to be entered into the Security Token section.

13 SalesLogix

Overview

This describes the features that are available when integrating with SalesLogix.

Supported Versions

The following SalesLogix versions are supported.

Version	Supported
Version 7.0	✅ *^
Version 7.1	✅ *^
Version 7.2	✅ ^
Version 7.5 SP2	✅ ^
Version 8.1	✅ ^

* - Click to dial feature is not supported
^ - Requires the Windows LAN client

Features

Integration with SalesLogix supports the features listed below:

- Click to dial
- Screen pop
- Automatic call history entry
- Calendar & DND synchronisation

Click to dial

When a record is displayed a new telephone icon is shown on the toolbar and a *Dial Phone* entry in added to the SalesLogix *Tools* menu.

When the telephone icon is clicked a new window is displayed that shows all of the telephone numbers that are available for this record.
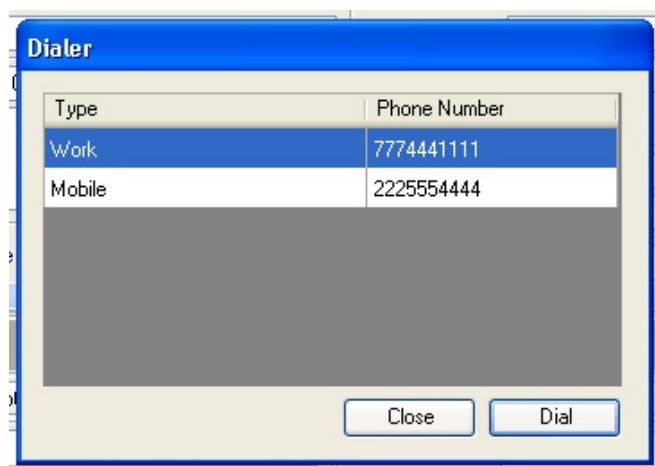
Selecting any of the rows and clicking *Dial* or double clicking the row will cause the selected number to be called.

> This requires Phone Manager to be running in the same Windows session as SalesLogix.

> If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

> This direct dial out replaces the built in TAPI based "Dialler" feature within SalesLogix and should not be used at the same time.

> The SalesLogix bundle is available on request and needs to be installed by your SalesLogix administrator (see the SalesLogix Bundle section for details)

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesLogix when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed with SalesLogix.
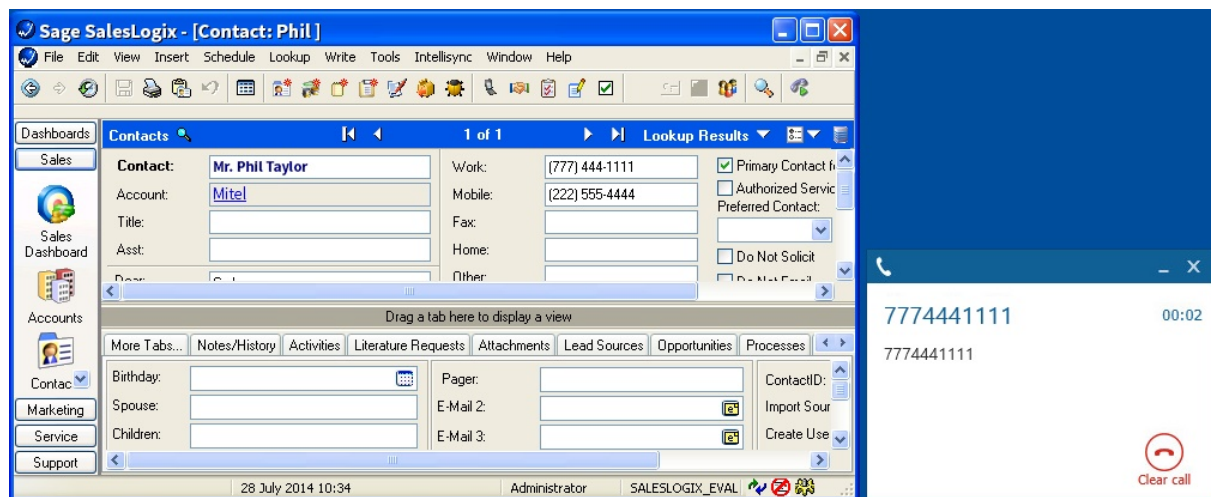
If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Contact* entities that have this telephone number.
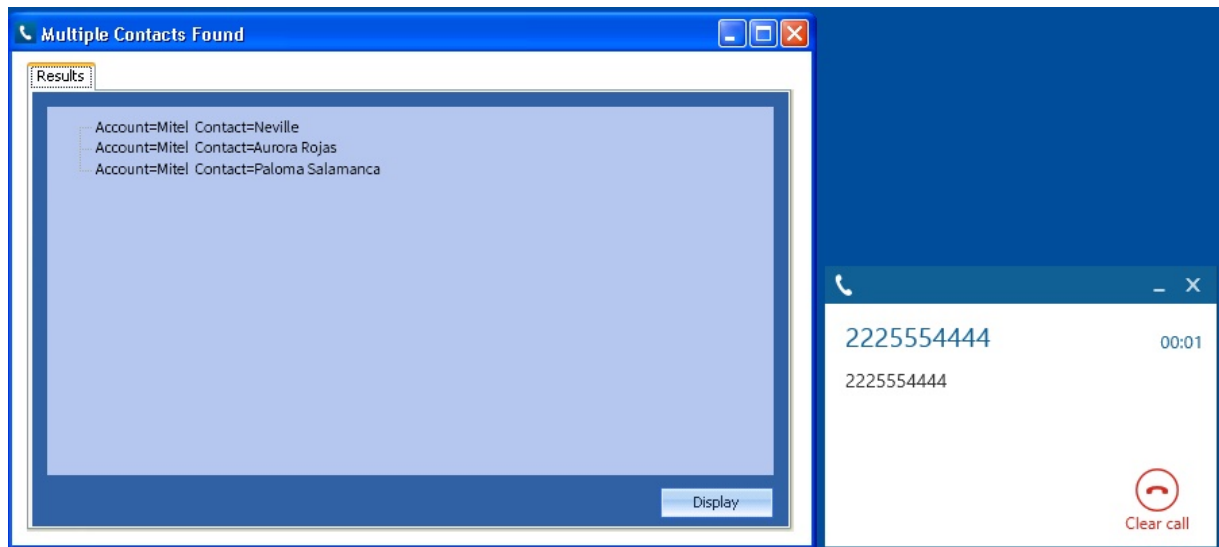
The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of records to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab.
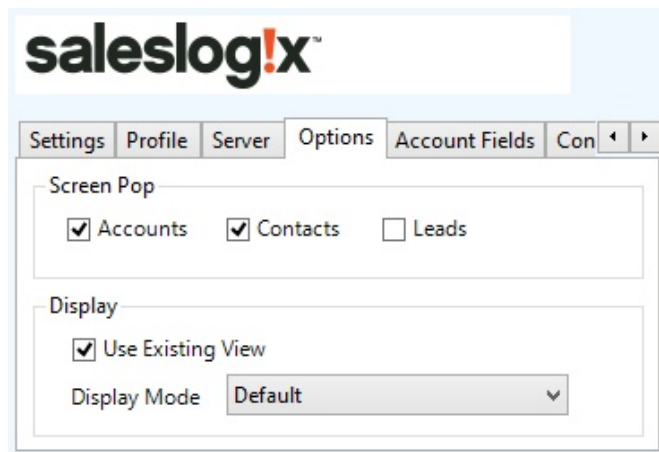
When SalesLogix is screen popped the display mode for how any matching records are shown can be configured as shown.
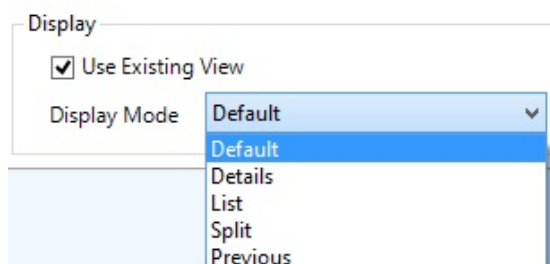
Selecting the *Use Existing View* option will use the current view settings. These settings are equivalent to the options available in the *View* menu within SalesLogix.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* records individually. By default the common telephone number fields are listed in the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.

Contact Entities

Field name	Enabled?
Work	✅
Mobile	✅
Fax	❌
Home	✅
Other	✅
Pager	❌
User Field 1	❌
User Field 2	❌
User Field 3	❌
User Field 4	❌
User Field 5	❌
User Field 6	❌
User Field 7	❌
User Field 8	❌
User Field 9	❌
User Field 10	❌

Account Entities

Field name	Enabled?
Main	✅

Alternate	❌
Fax	❌
Toll Free	✅
Toll Free 2	❌
Other Phone 1	❌
Other Phone 2	❌
Other Phone 3	❌
User Field 1	❌
User Field 2	❌
User Field 3	❌
User Field 4	❌
User Field 5	❌
User Field 6	❌
User Field 7	❌
User Field 8	❌
User Field 9	❌
User Field 10	❌

Lead Entities

Field name	Enabled?
Work	✅
Home	✅
Mobile	✅
Fax	❌
Toll Free	✅
User Field 1	❌
User Field 2	❌
User Field 3	❌

User Field 4	
User Field 5	
User Field 6	
User Field 7	
User Field 8	
User Field 9	
User Field 10	

Telephone number formats

SalesLogix does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a SalesLogix Phone Call activity. The record to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The activity record is automatically created with the information relating to the call entered into the *Notes* field and the related records are linked as shown.

Start Time	The date and time when the call was started.
End Time	The date and time when the call was ended.
Result	The account code entered on the call.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Calendar & DND synchronisation

The calendar within SalesLogix can be synchronised with the DND status of the extension of the User. For example when there is a meeting in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the *Regarding* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

For example the *Meeting* entry below will place the Users extension into DND between 09:00 and 16.30 with the DND text set to "Sales meeting".
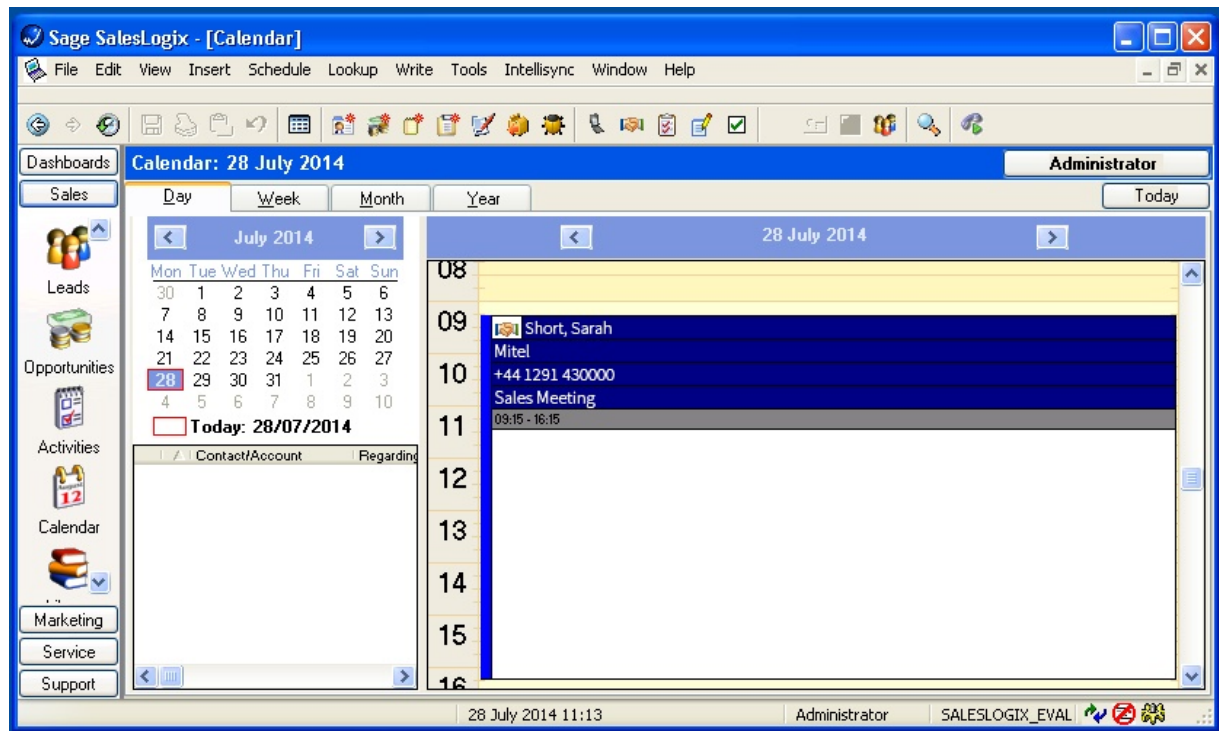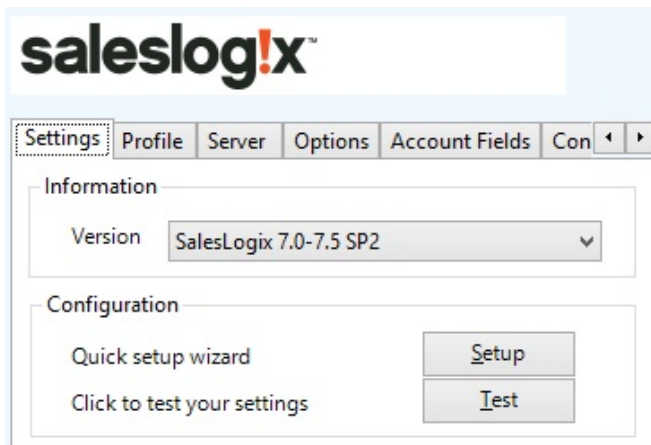
Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to SalesLogix.

Wizard

The *Settings* tab provides a *Quick Setup Wizard* to enable these to be easily configured.

Click on the *Setup* button to start the wizard.

Ensure that SalesLogix is open and then click on *Detect* and this will complete the form automatically.

Select the *Database Name* for the SalesLogix database to use and then click *Save*. From the *Settings* tab click on the *Test* button to validate the details and a confirmation message will be displayed if the configuration is successful.

If this fails then more options can be configured on the other tabs.

Authentication profile

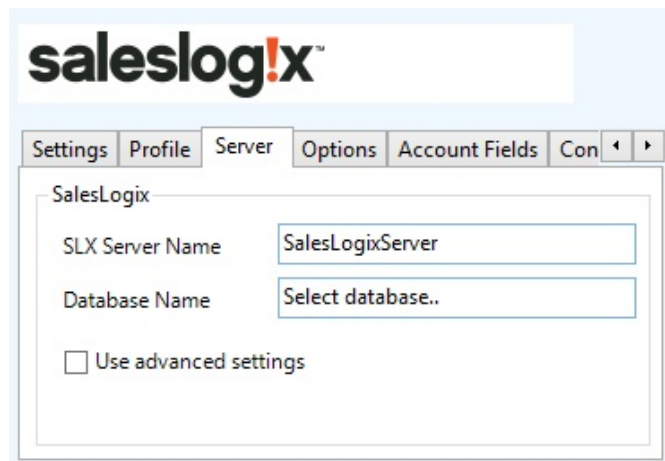The Profile tab enables the security credentials used to access SalesLogix to be configured.

Use Integrated Windows Authentication: If this is set then the username, password and domain details from user who is logged on the computer will be used.

Depending on the configuration of Sage SalesLogix and how it is accessed will dictate what options are required. For example if a different user account is used to access SalesLogix than what is currently logged into the computer then they will need to be manually entered.

Server details

The *Server* tab enables the server details and database that is to be used to be configured.

SLX Server Name: The server name or IP address of the computer hosting the SalesLogix database.

Database Name: The name of the SalesLogix database to use.

Advanced Settings: Enables the Advanced and Extended tabs for extra configuration options.

Advanced options

The *Advanced* and *Extended* tab enables more advanced options to be configured.

These options are not normally required to be changed, contact your SalesLogix administrator for details.

Sales Logix Bundle

SalesLogix allows for 3rd party integration components to be installed into the SalesLogix environment to provide additional features. To install the SalesLogix bundle the following steps need to be performed.
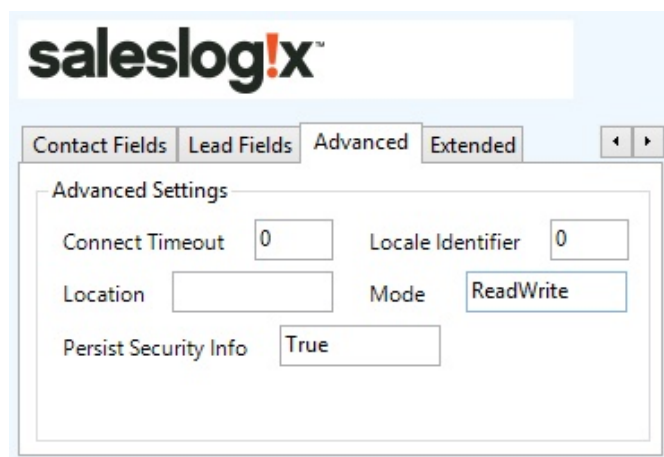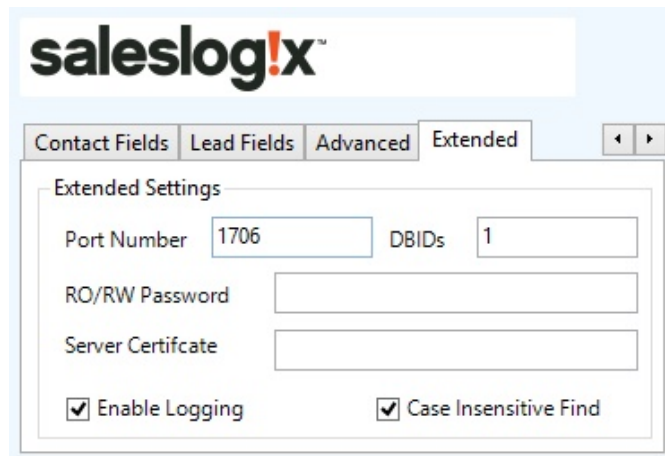
1. Run the SalesLogix Administrator Program.
2. Click the Bundles button.
3. Click the Install button.
4. Locate and select the Phone Manager Bundle.
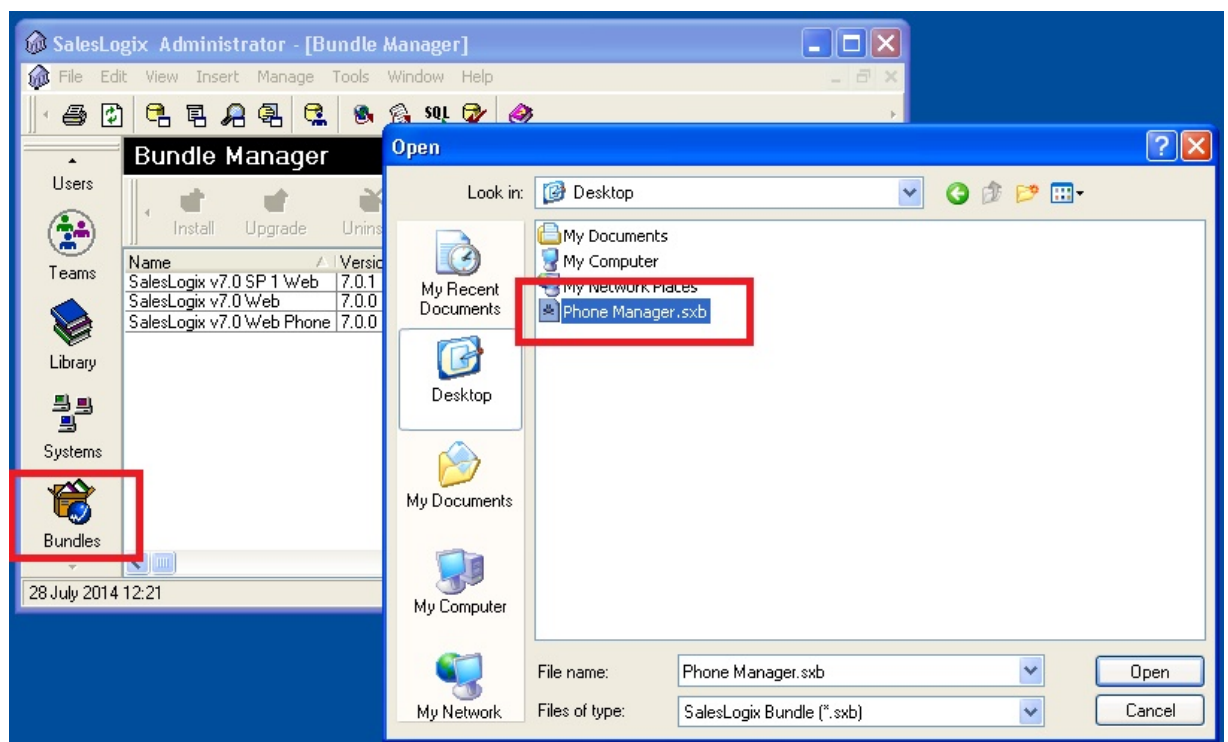
5. Click OK on the Choose Actions To Install window.
6. If prompted select to allow the plugin to be released and select the group to release to.
7. The Phone Manager Bundle should then be displayed in the list.

8. Close SalesLogix Administrator Program.
9. Installation is complete, open SalesLogix.

14 SugarCRM

Overview

This describes the features that are available when integrating with SugarCRM.

Supported Versions

Version	On-premise deployment	Cloud
v6.4 - v7.9	✓	✓

> The integration uses SugarCRM Web Services v4.1. Although SugarCRM tries to maintain backwards compatibility when they upgrade their cloud platform this is never guaranteed. This version of the plugin has been tested on the latest version that was available upon release.
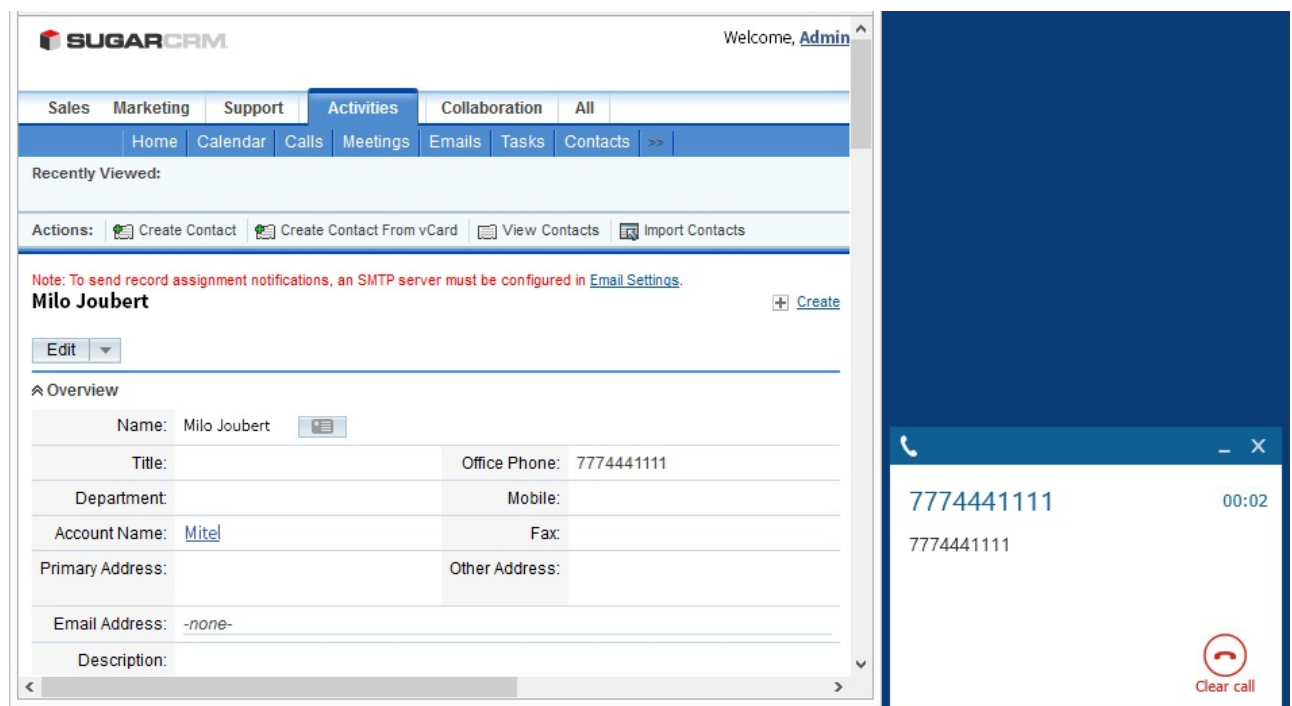
Features

Integration with SugarCRM supports the features listed below:

- Screen pop for account, customer and lead records
- Automatic call activity entry

Screen pop

CRM *Account*,*Contact* and/or *Lead* records can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching records that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* record was found and the record was automatically displayed using the Users default browser.

If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found 2 matching *Contact* records and

1 matching *Account* record that have this telephone number.
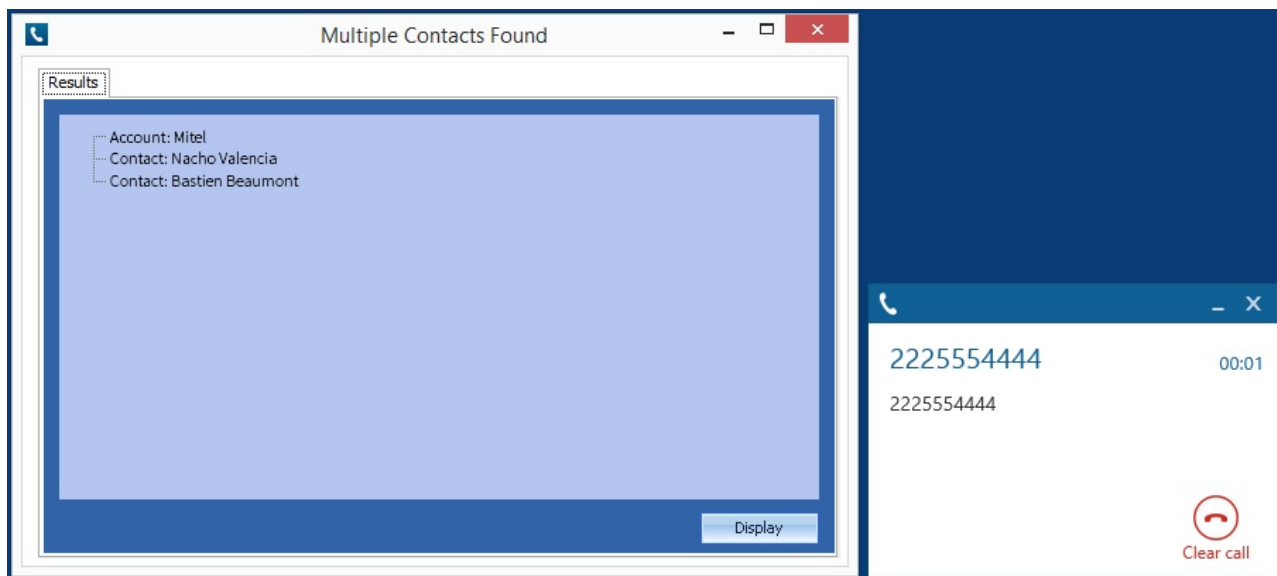
The correct record can then be highlighted and then clicking on the *Display* button or double clicking the entry will open this record.

> 📑 The plugin will only search for records that have not been *Deleted*. If any records have been marked as *Deleted* then they will not be displayed.

Record and matching options

Configuration options are available on the plugin that allow the type of *Records* to be used in the searching to be set. For example it can be configured so that only the *Contact* records are searched. These options are set on the *Options* tab.
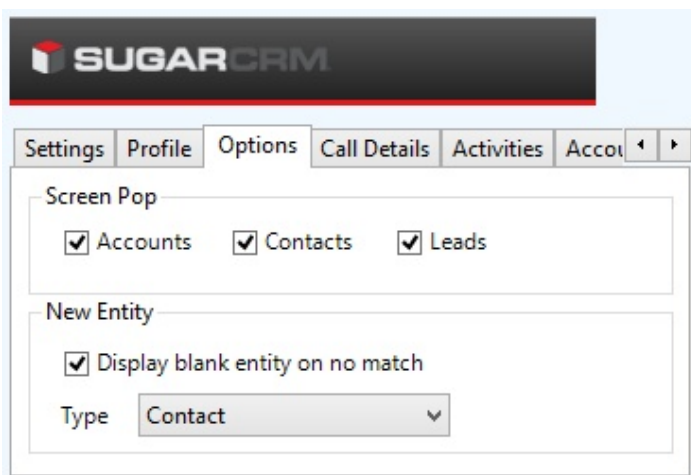
If no match is found when searching than a blank form can be automatically displayed to create a new record. The record type, *Account*, *Contact* or *Customer* that is created can be set here.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* records individually. By default the common telephone number fields are listed on the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.
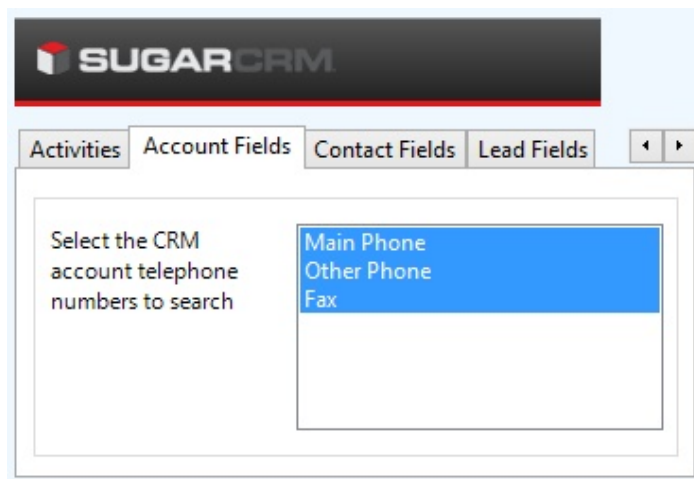
These are the default field name and descriptions and may be different if they have been customised. Contact your SugarCRM administrator for details.

Contact Records

Field name	Field description	Enabled?
Business Phone	phone_work	✅
Home Phone	phone_home	✅
Other Phone	phone_other	✅
Fax	phone_fax	✅
Mobile Telephone	phone_mobile	✅
Assistant phone	assistant_phone	✅

Account Records

Field name	Field description	Enabled?
Main Phone	phone_office	✅
Other Phone	phone_alternate	✅
Fax	phone_fax	✅

Lead Records

Field name	Field description	Enabled?
Business Phone	phone_work	✅
Home Phone	phone_home	✅

Other Phone	phone_other	✅
Fax	phone_fax	✅
Mobile Telephone	phone_mobile	✅
Assistant phone	assistant_phone	✅

Telephone number formats

SugarCRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.

📝 Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a SugarCRM Call Activity. The record to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping.
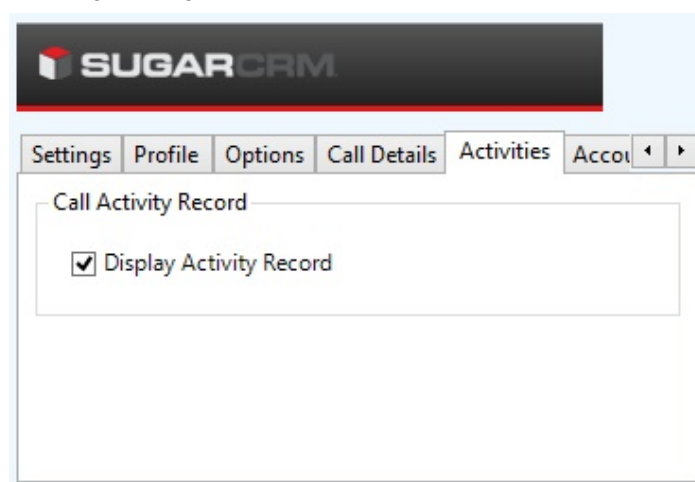
The Activity record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.

Display activity record: This will display the *Activity* form, if this is not set then the record will be created without the user seeing the form.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Sugar CRM.

Settings and versions

The supported version of SugarCRM can be seen on the *Settings* tab.

Profile details

The specific account details that will be used to connect to SugarCRM need to be set on the *Profile* tab.

URL: This is the URL to the SugarCRM server.

Username: The username of the account used to login to SugarCRM for this user.

Password: The password used to access SugarCRM for this user.

15   Swiftpage Act!

Overview

This describes the features that are available when integrating with Swift Page Act!.

Supported Versions

The following Act! versions are supported.

Version	Supported
v19 (2017)	✅
v18 (2016)	✅
v17 (2015)	✅
v16 (2014)	✅
v15 (2013)	✅

Features

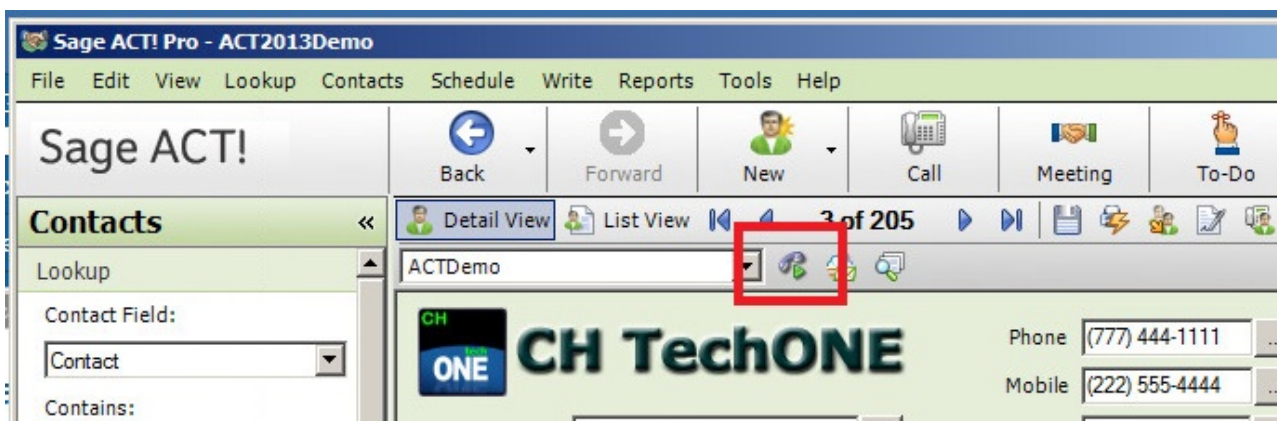Integration with Act! supports the features listed below:
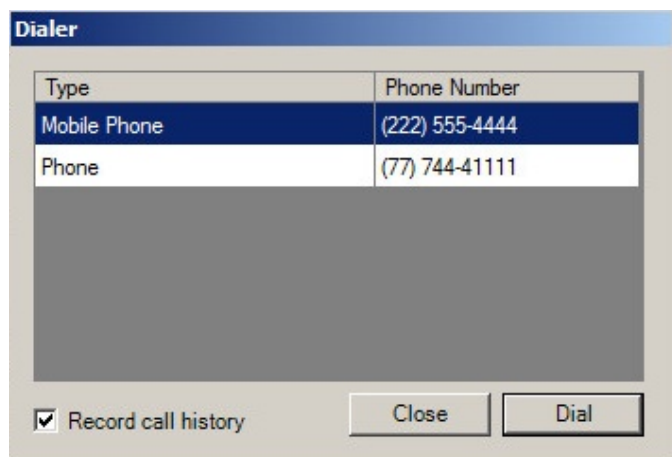
- Click to dial
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

Click to dial

When a Contact record is displayed a new telephone icon is shown on the toolbar.

When the telephone icon is clicked a new window is displayed that shows all of the telephone numbers that are available for this contact.

Selecting any of the rows and clicking *Dial* or double clicking the row will cause the selected number to be called.

> 📋 This requires Phone Manager to be running in the same Windows session as Act!.

When an outbound call is made using this method a call history record can be created and opened once the Dial command has been selected. To enable this select the *Record call history* option on the form.

> 📋 If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

> ⚠️ This direct dial out replaces the built in TAPI based "Dialler" feature within Act! and should not be used at the same time. To disable the built in "Dialler" feature, from the menu bar select Tools -> Preferences -> Communication -> Dialler Preferences and un check the Use dialler option.

Screen pop for contacts

The Act! contacts can be screen popped directly within Act! when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search on the contacts to find any records that have matching telephone numbers. A match was found and the contact record was automatically displayed.

> 📋 Only 'telephonefield' types are supported when searching for telephone numbers in contacts! If the field type is not set correctly in ACT! it will not screen pop
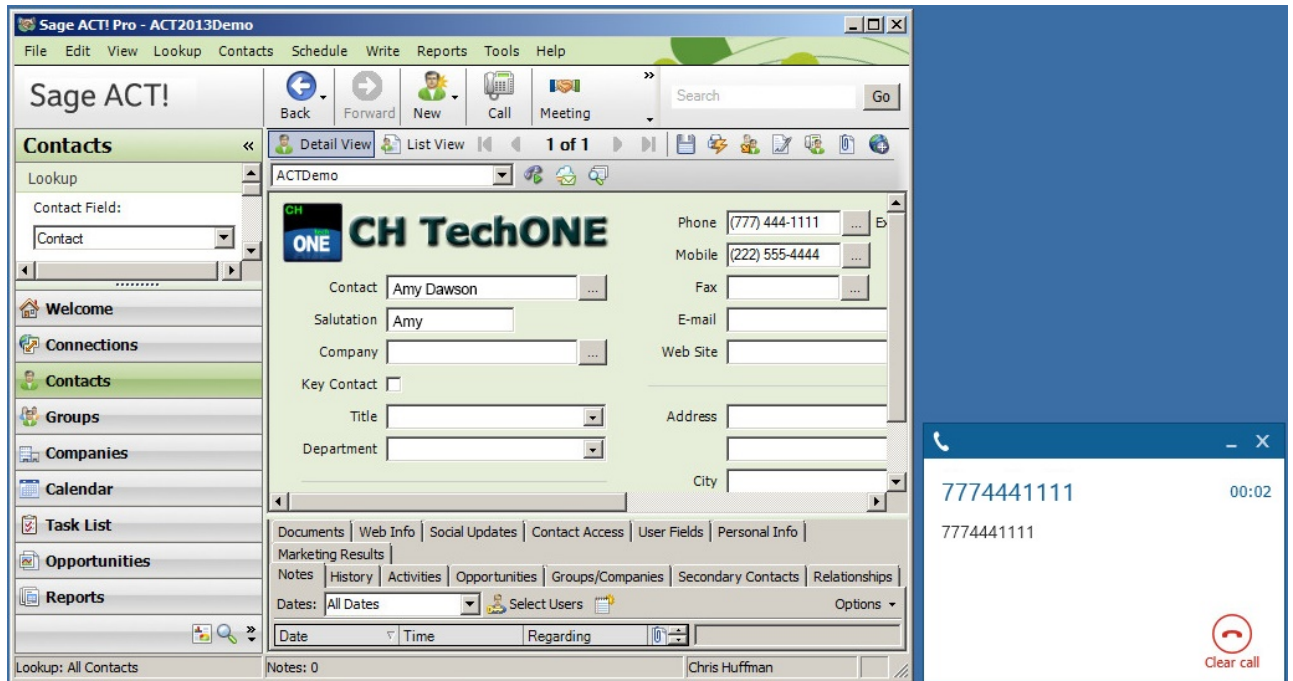
If multiple matches are found then the current Act! view be filtered down for the relevant matches. For example a call is made to 222555444 and this has found three contacts that have this telephone number.
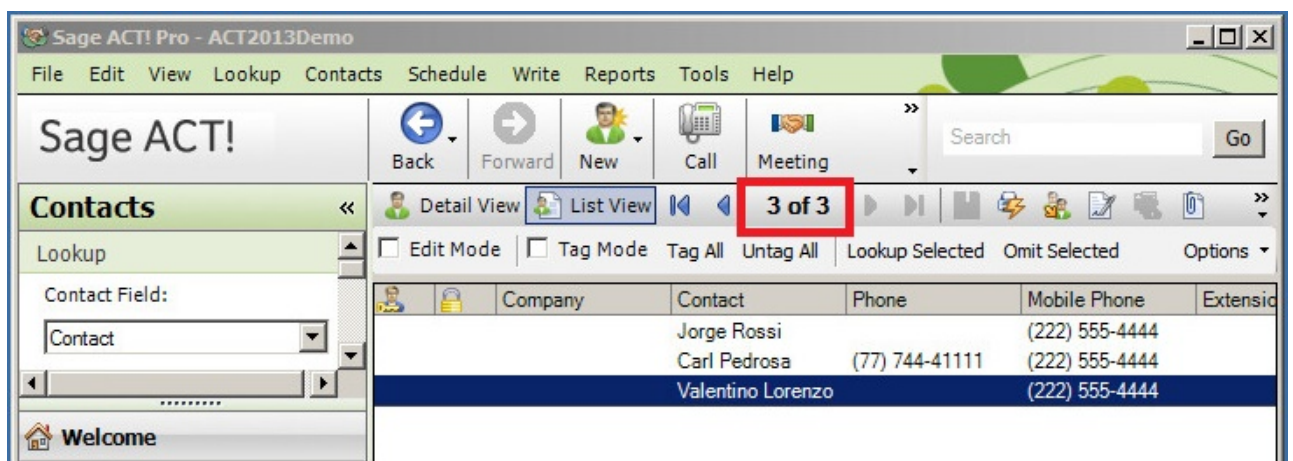
If no matches are found then there is a setting on the Options tab to enable a new *Contact* record to be created. The Phone field is set to the number received and this *Contact* is then displayed.

Contact fields

The range of telephone numbers that are to be searched for can be configured. By default the common telephone
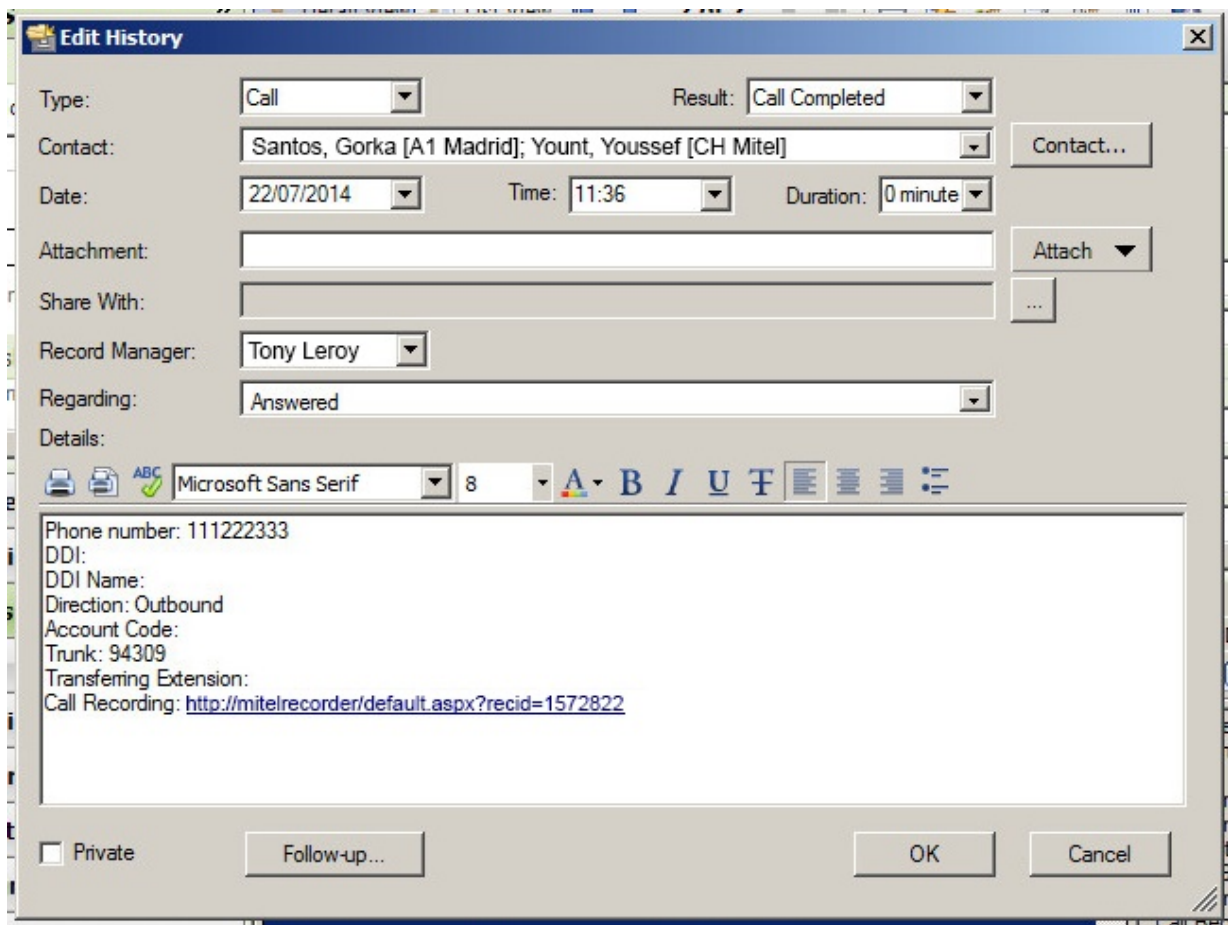
number fields are pre selected.

Act! Description	Act! Field Name	Enabled?
Business Phone	BUSINESS_PHONE	✅
Mobile Phone	MOBILE_PHONE	✅
Alternate Phone	ALTERNATE_PHONE	✅
Fax Phone	FAX_PHONE	✅
Home Phone	HOME_PHONE	✅
Pager Phone	PAGER_PHONE	✅

Automatic call history entry

Phone Manager can work with the History within Act! and can have *Call* entries automatically created for calls made or received by the User when a match has been found to an entry in their Act! contacts. The contact to associate with this is found using the caller id received or dialled number.

The body of the call entry is populated with the information shown.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Calendar & DND synchronisation

The calendar within Act! can be synchronised with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the *Regarding* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

For example the *Scheduled Activity* entry below will place the Users extension into DND between 09:00 and 13.30 with the DND text set to "Sales Meeting".

There are options to be able to select the type of *Activities* that trigger the DND change and these are configured on the *Activities* tab.

The *Options* tab has settings to control if private activities, recurring activities and all day events will be acted upon.

Configuration

The integration needs to be configured for the correct version of Act! that is running. From the *Version* tab select the relevant entry from the drop down list.
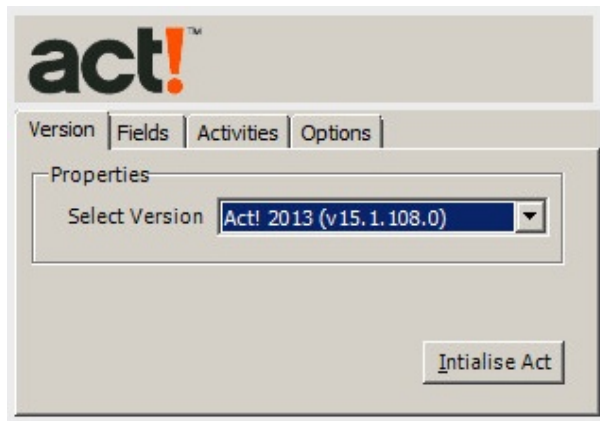
Once this has been selected the plugin needs to be initialised with the Act! application. This is performed by clicking on the *Initialise Act* button.

Act! will need to be closed before this can be done.

The plugin uses the Act! plugin framework and when you click *Initialise Act* the required files are copied into the Act! plugin folder. If this is not successful then the current user may not have the permissions to be able to copy files to this location. By default this is:

C:\Program Files\ACT\Act for Windows\Plugins

16 TigerPaw

Overview

This describes the features that are available when integrating with TigerPaw.

Supported Versions

Version	Supported
16.1.07	✅
15.2.02	✅
14.1.20	✅

## Features

Integration with TigerPaw supports the features listed below:

- Screen pop for accounts
- Automatic call history entry
- Calendar & DND synchronisation

Screen pop

Account records can be screen popped directly within TigerPaw when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching *Accounts* or *Contacts* that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have this telephone number. A matching *Contact* entity was found and the associated *Account* record was automatically displayed within TigerPaw.
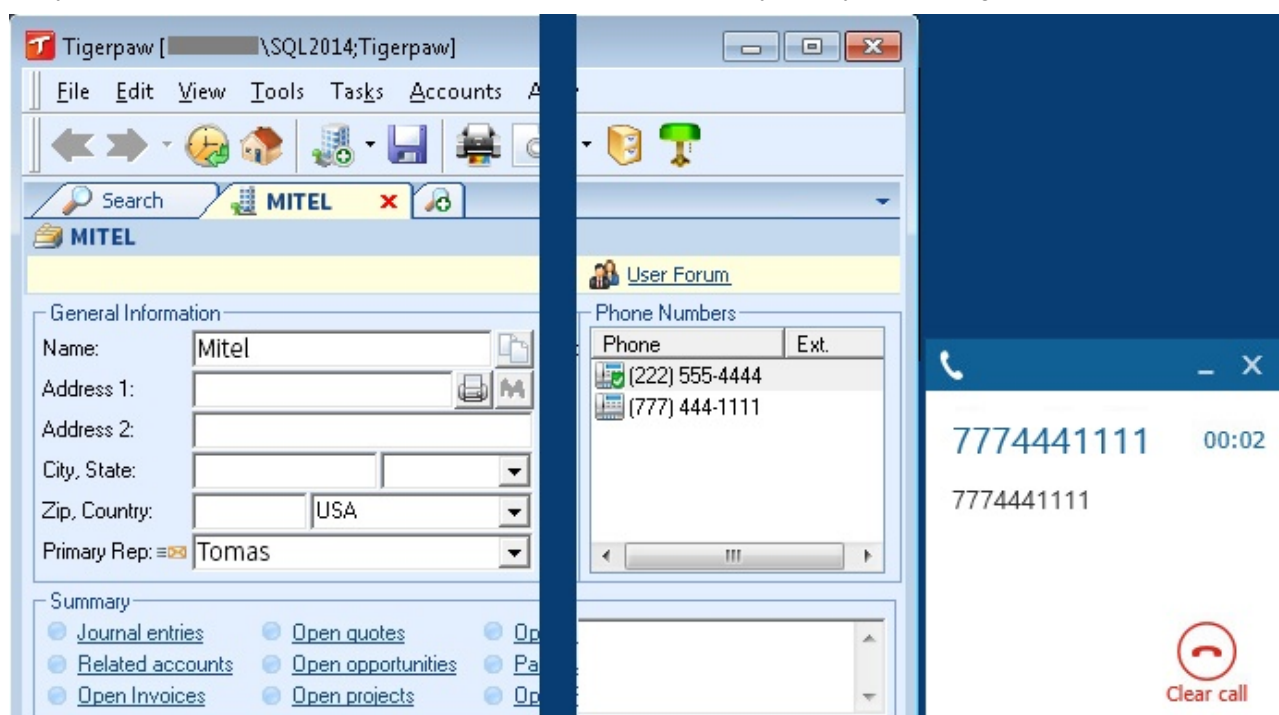
If multiple matches are found then the *Multiple Matches* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching records, an *Account*, and 2 *Contacts* that have this telephone number.
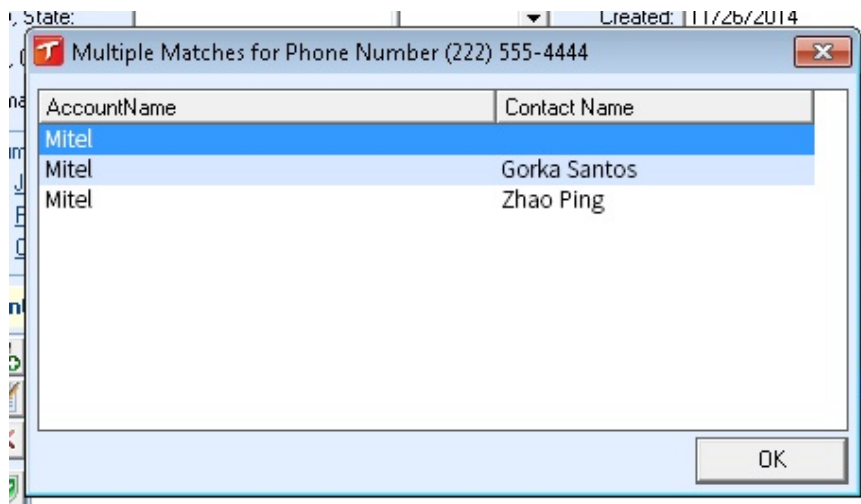
The correct record can then be highlighted and then clicking on the *Display* button will open this associated *Account* record.

> Even though the telephone numbers for a *Contact* record can be searched for only their associated *Account* can be screen popped.

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a TigerPaw Phone Call Task. The *Account* to associate this with is found using the caller id received or the number dialled.

> If there are multiple *Accounts* and/or *Contacts* with the same telephone number then the first *Account* retrieved will be associated with the task.

The Activity record is automatically created with the information relating to the call entered into the relevant fields.
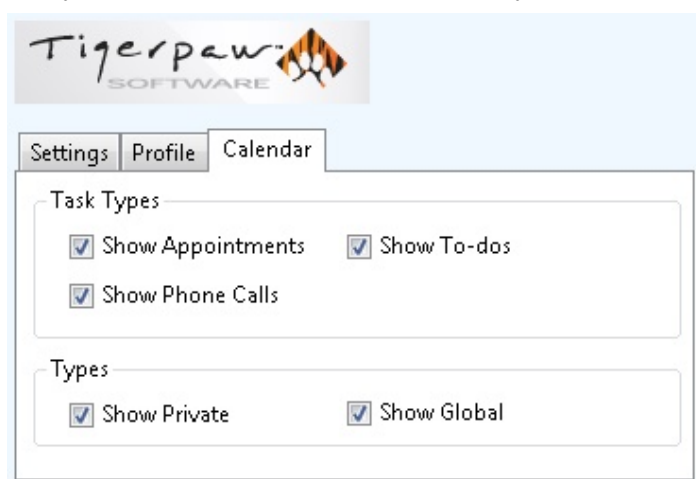
Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

Calendar & DND synchronisation

The calendar within TigerPaw can be synchronised with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the subject of the appointment. When the appointment ends, the extension will be automatically removed from DND.

Calendar

The type of *Tasks* that can be included in the synchronisation can be configured on the *Calendar* tab.

Show Appointments: This enables *Appointment* task to be included in the synchronisation.

Show To-dos: This enables *To-do* tasks to be included in the synchronisation.

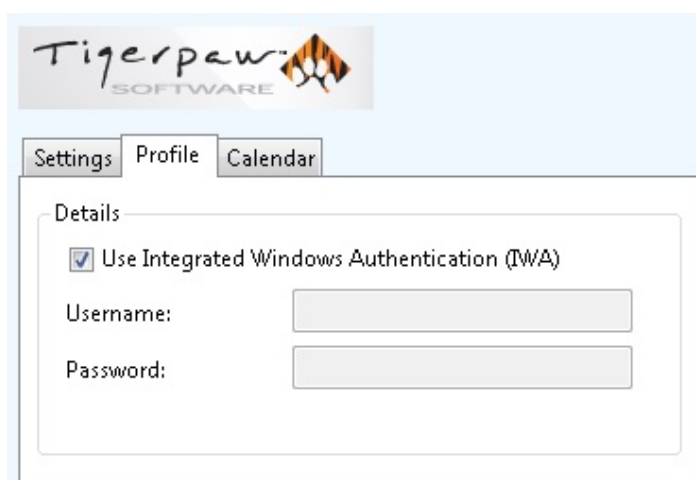**Show Phone Calls**: This enables *Phone Calls* tasks to be included in the synchronisation.

Show Private: This enables *Private* tasks to be included in the synchronisation.

Show Global: This enables *Global* tasks to be included in the synchronisation.

Configuration

Profile

The database authentication details used to connect to the TigerPaw database are configured on the *Profile* tab.

Select **Use Integrated Windows Authentication (IWA)** to use the login details of the current user, or enter the **Username** and **Password** details into the relevant fields.

17 Zendesk

Overview

Zendesk is an online ticket/customer support CRM; this Document describes the features that are available when integrating Phone Manager with Zendesk. Zendesk by default only supports one 'Phone' field for storing a telephone number; this is the field that is searched when attempting to find a contact.

Supported Versions

As Zendesk is an online product they have no concept of a version numbering scheme. Phone Manager integration was tested against the Zendesk V2 API.

Features

Integration with Zendesk supports the features listed below:

- Screen pop for contacts/open tickets

Screen pop

'end-user' people or their open tickets can be screen popped when an incoming call is received using the caller id (CLI) from the inbound call or the dialled number on an outbound call. For example an inbound call is received from 07718402534, if there are no tickets currently open for this 'end-user' then their user profile is displayed.
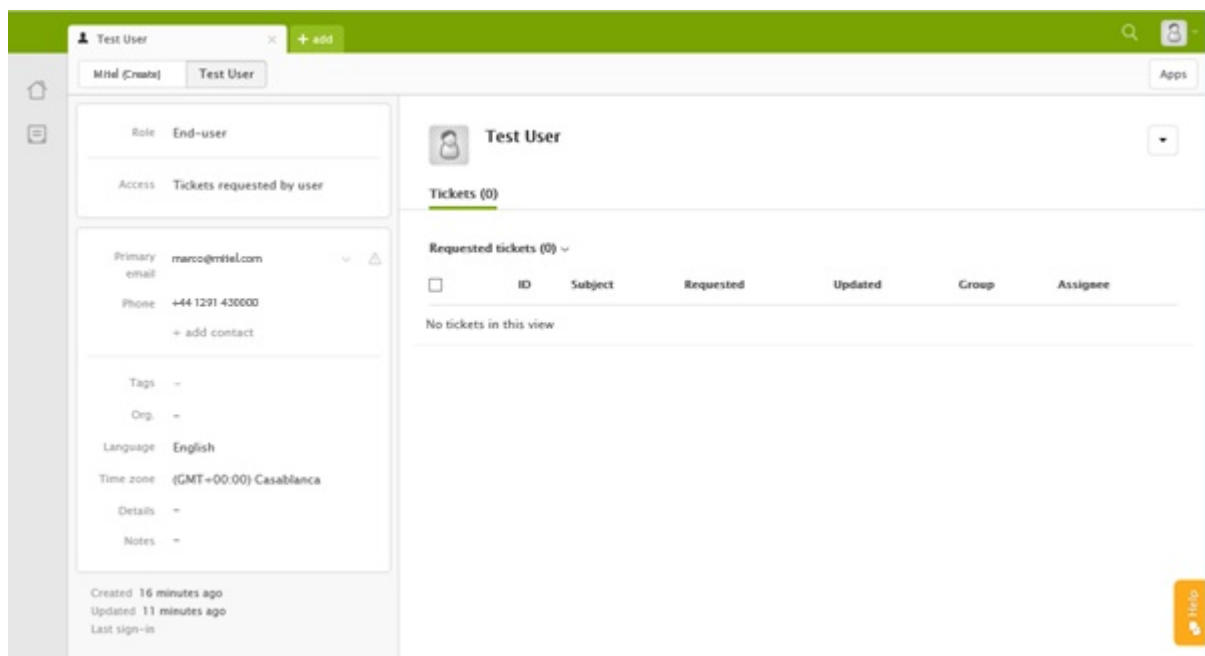
If multiple matches are found then the Multiple Contact Found dialog is shown:
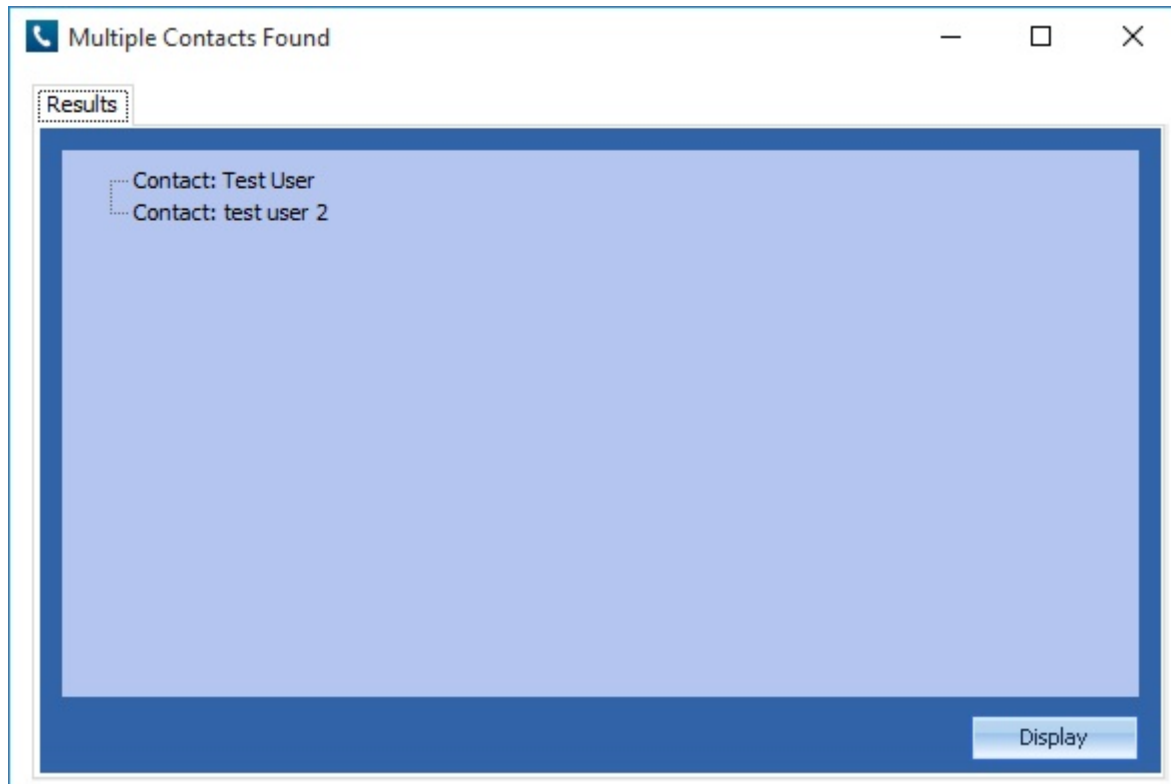
The Multiple Contact Found dialog will also be shown if the 'Search Open tickets on Contact Match' setting is enabled in the Phone Manager Plugin. The dialog will allow the selection of the specific ticket item to display:
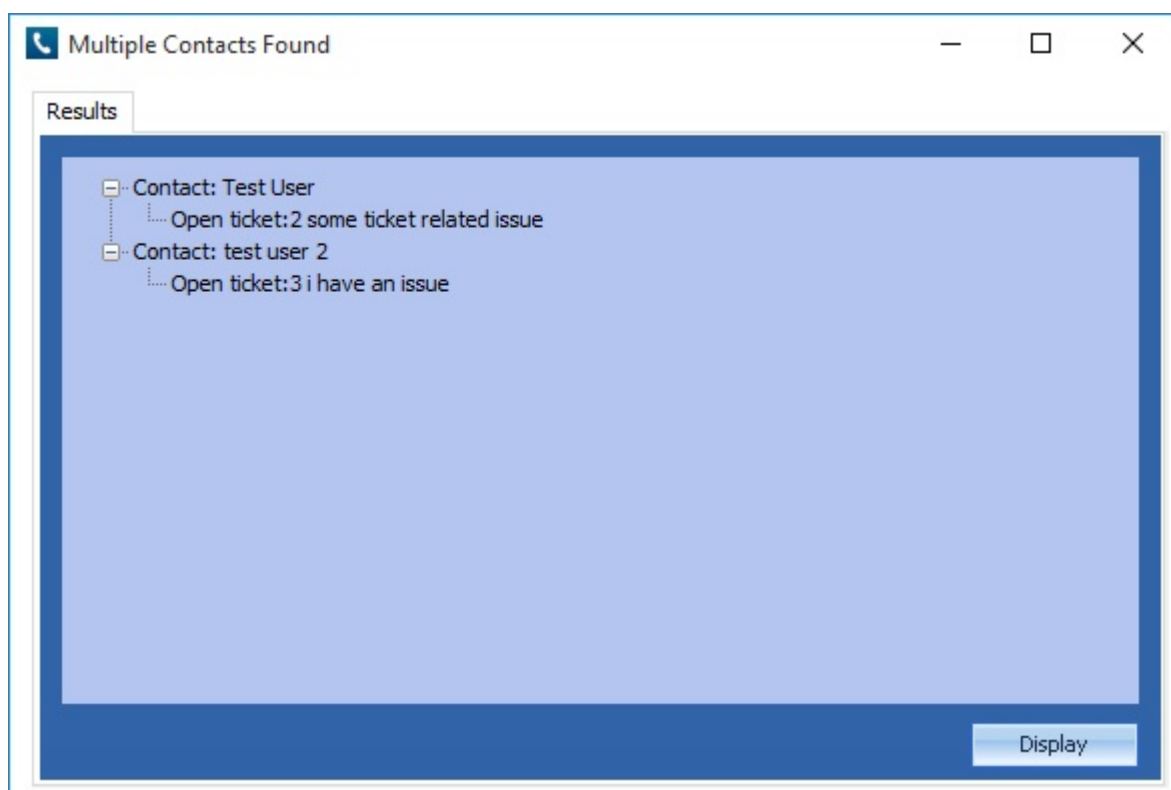
Configuration

The integration requires the Zendesk URL and authentication credentials for the user. User password or authentication token can be used; these are setup on the Zendesk administration by your administrator in the settings/channel/API section of the Zendesk configuration.

The option to search for tickets and whether to open the screen pop in a new browser window or in the same logged in session as selected in the setting tab of the integration, there is also a 'Test' button which will test whether the configured URL and user credentials are correct.

18   Zoho CRM

Overview

This describes the features that are available when integrating with Zoho CRM.

Supported Versions

Version	Cloud
2019	✅
2014	✅

The integration uses Zoho CRM Web Services v2019 or v2014. Although Zoho CRM tries to maintain backwards compatibility when they upgrade their cloud platform this is never guaranteed. This version of the plugin has been tested on the latest version that was available upon release.

Limitations

The Zoho CRM API limits the number of API requests for a company on a per day limit. When searching over multiple modules there will be a separate API request for each module.

Your version of Zoho will determine how many queries you are allowed per day. If you go over that number Zoho will return an error when sending the query. You will then not be able to make any more queries that day so the screen pop will not work.

To increase performance it is recommended that you store your telephone numbers in an unformatted string i.e. 08001831234 and turn off the Advanced Searching option, see the Advanced section for details.
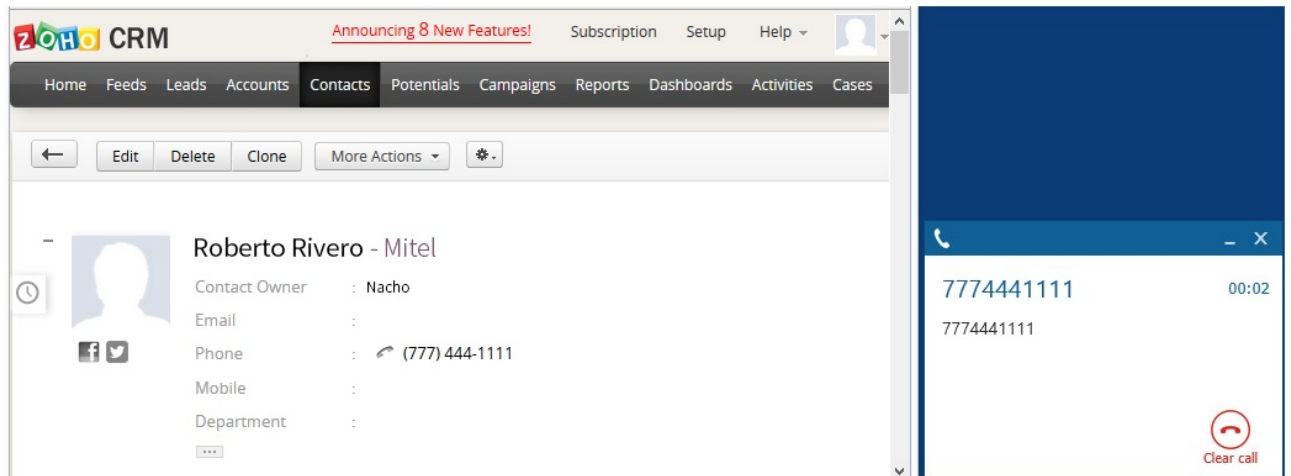
Features

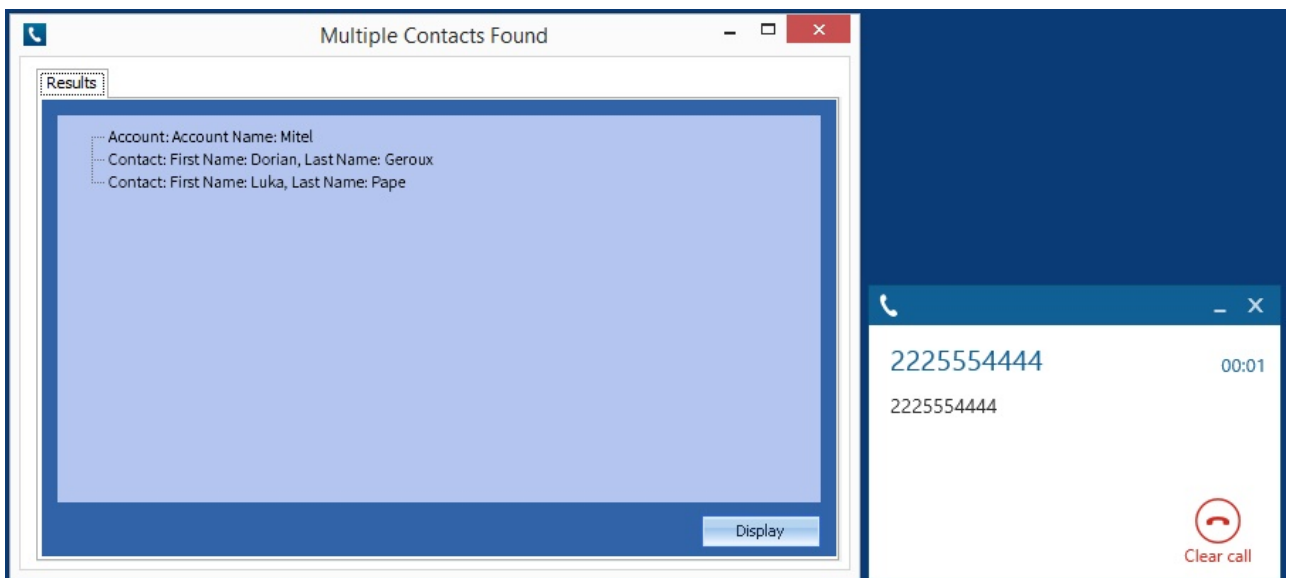Integration with Zoho CRM supports the features listed below:

- Screen pop for contacts, accounts and leads
- Automatic call history entry

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.
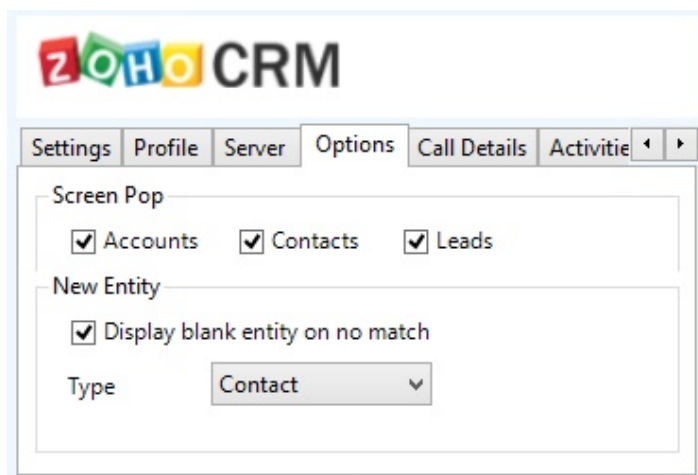
If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching entities, a *Account*, *Contact* and *Lead*, that have this telephone number.

The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* Entities are searched. These options are set on the *Options* tab
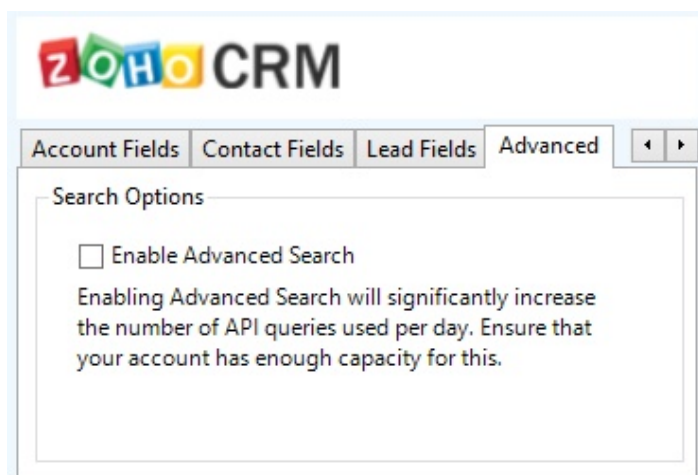
If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Advanced options

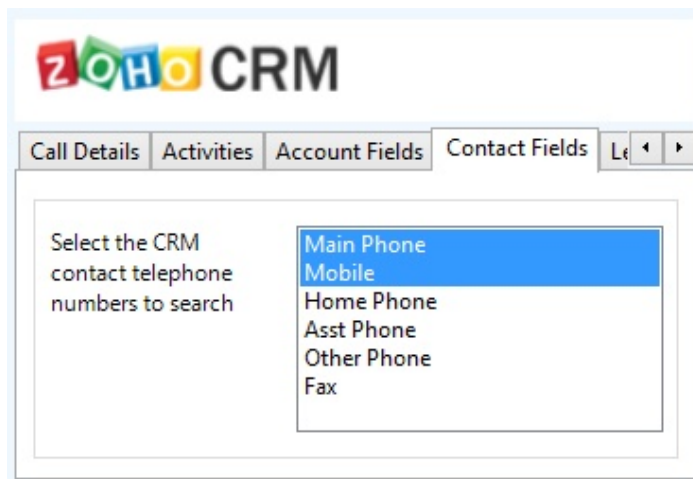The *Advanced* tab control how matching contacts are searched for.

> ⚠ Zoho CRM limits the number of calls to its API, and only lets you search for 1 phone number at a time. Zoho CRM free edition you may only send 250 queries per company per day, meaning if you are searching for the number 9876543210 in the US, and only searching for the Main Telephone number and only on the Contacts module, this search will generate 9 queries.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* Entities individually. By default the common telephone number fields are listed on the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.

These are the default field name and descriptions and may be different if they have been customised. Contact your Zoho CRM administrator for details.

Contact Entities

Field name	Field description	Enabled?
Main Phone	Phone	✅
Mobile	Mobile	✅
Home Phone	Home Phone	✅
Asst Phone	Asst Phone	✅
Other Phone	Other Phone	✅
Fax	Fax	✅

Account Entities

Field name	Field description	Enabled?
Phone	Phone	✅
Fax	Fax	✅

Lead Entities

Field name	Field description	Enabled?
Phone	Phone	✅
Mobile	Mobile	✅
Fax	Fax	✅

Telephone number formats

Zoho CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin

supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210	(987)654-3210		

⚠ Zoho CRM limits the number of calls to its API, and only lets you search for 1 phone number at a time. Zoho CRM free addition you may only send 250 queries per company per day, meaning if you are searching for the number 9876543210 in the US, and only searching for the Main Telephone number and only on the Contacts module, this search will generate 9 queries. To increase performance and reduce queries you can disable the telephone format searching as described in Advanced section.

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.

☝ Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a Zoho CRM Phone Call Activity entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The Activity record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are not known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the recording id when the call has been answered.

The plugin configuration has options that can be set to determine how the record is created.
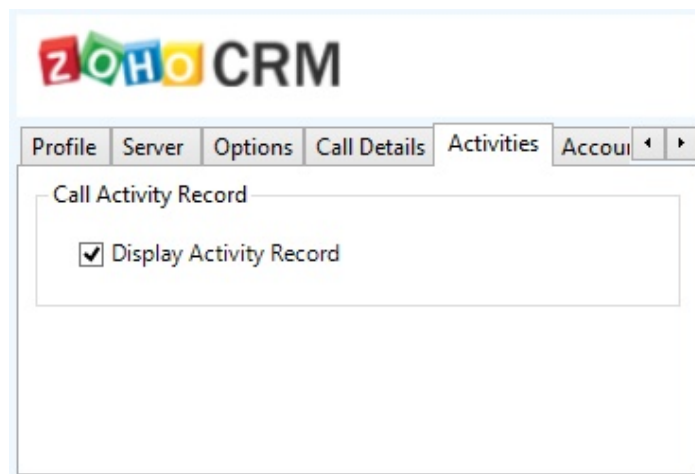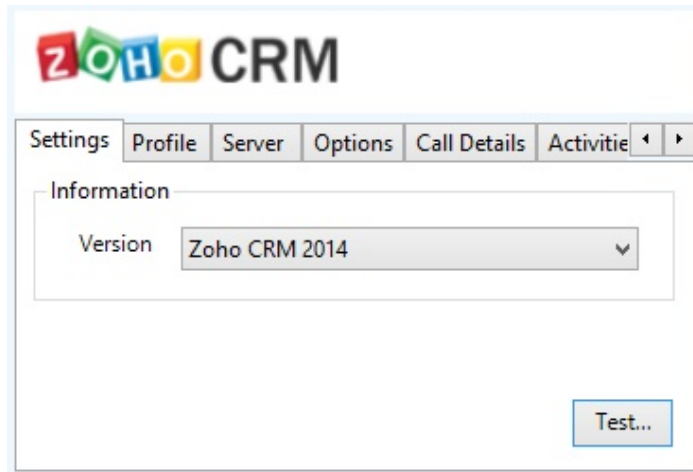
Display Activity Record: This will display the Activity form, if this is not set then the record will be created without the user seeing the form.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Zoho CRM.

Settings and versions

The correct version of Zoho CRM that is used needs to be selected from the Version drop down on the *Settings* tab.
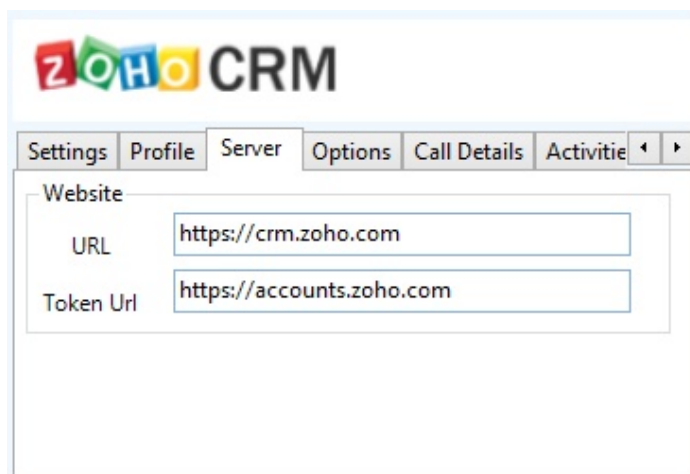
Server connection

The specific connection details to the CRM server need to be set on the *Server* tab.

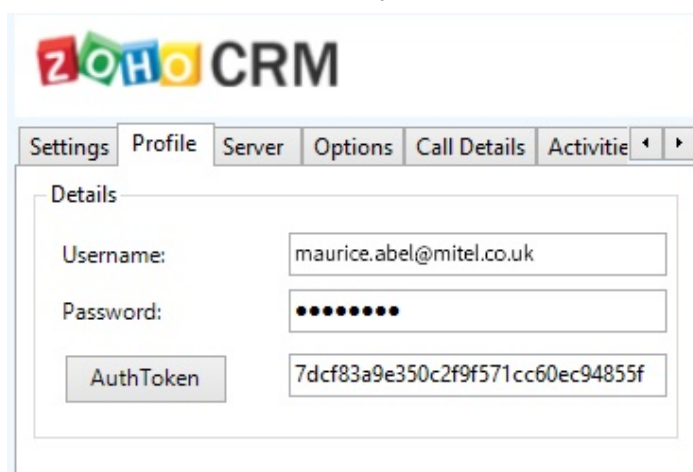**URL**: This is the URL of the Zoho CRM server. Contact your administrator for details on what this should be. Leave this as https://crm.zoho.com for the hosted version.

Token URL: This is the URL of the Zoho CRM accounts server. Contact your administrator for details on what this should be. Leave this as https://accounts.zoho.com for the hosted version.

Authentication and profile details

The Profile tab enables the security credentials used to access Zoho CRM to be configured.

Username: This is the Zoho CRM username.

Password: This is the Zoho CRM password for this user.

Auth Token: This button generates an authentication token to log into Zoho CRM. You only need to generate this once. If you already have an authentication token you may enter it in here. The token is generated by Zoho based on your Zoho Username and password.

Your Zoho CRM administrator can manage AuthTokens through the settings page under Active AuthTokens setting shown.

19   EMIS (UK only)

Overview

EMIS Web allows healthcare professionals to share and use vital information, so they can provide better, more efficient care; this Document describes the features that are available when integrating Phone Manager with EMIS Web.

Please ensure that:

- EMIS has been setup to allow Phone Manager integration
- Only one instance of EMIS Web is running on the user's PC at any one time otherwise the integration will not function.

> A separate EMIS licence and support subscription are required. Phone Manager must be running version 5.0.12 or above.

Supported Versions

N/A. EMIS Web is a hosted environment. The current version is supported.

Features

Integration with EMIS supports the features listed below:

• Screen pop for patients

Screen Pop

Patients can be screen popped when an incoming call is received using the CLI from the inbound call or the dialled number on an outbound call. For example, an inbound call is received from 07718402534 their Patient information is displayed.
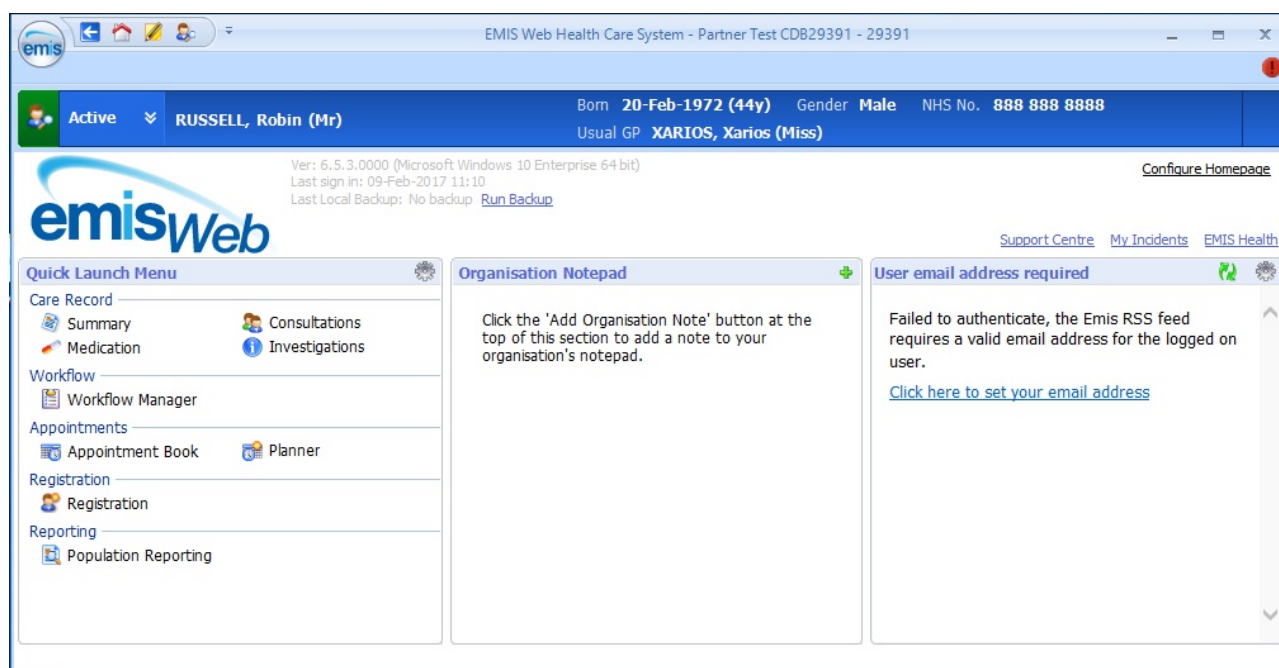
If you already have a patient screen open at the time of the screen pop then the 'new' calls patient information will be displayed, do not forget to return to the previous patient's information at some point and save any changes into EMIS.
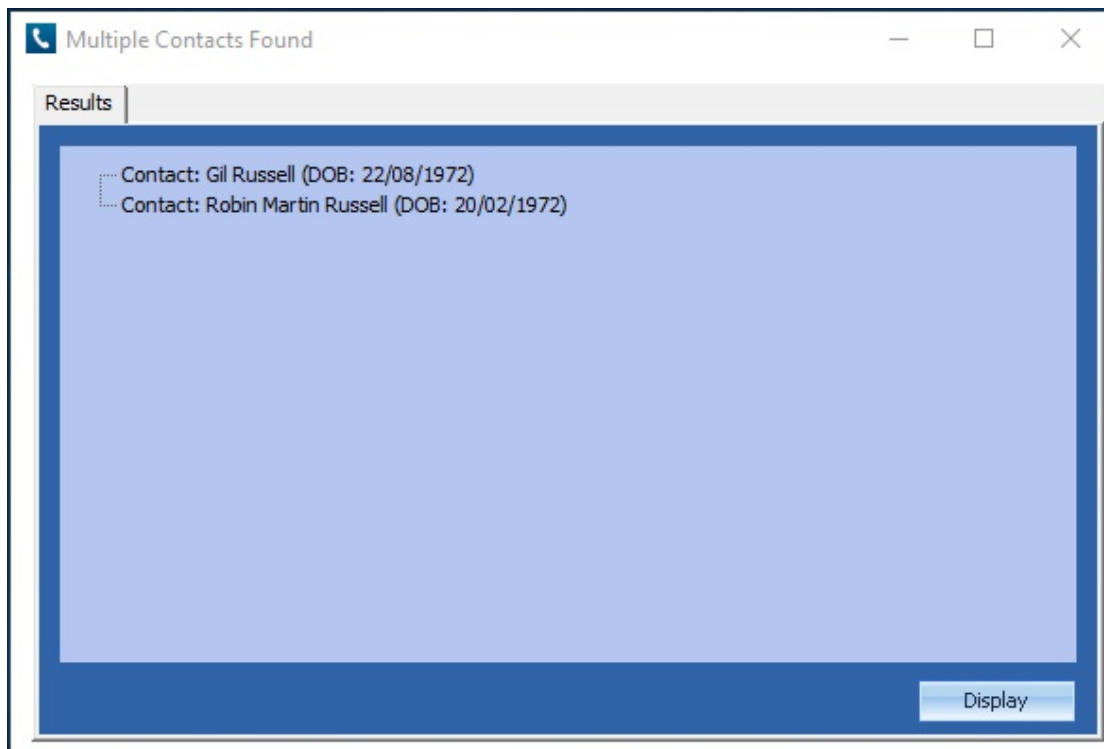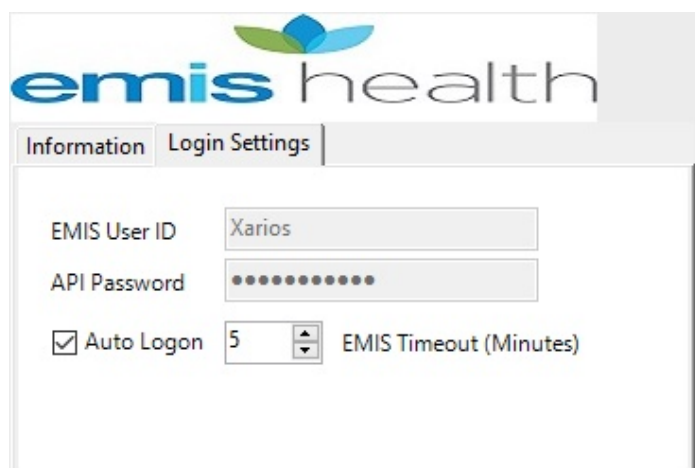

Configuration

Information Tab

The practice's EMIS Org ID needs entering and the NHS area needs to be selected.

Login Settings Tab

EMIS User ID and the API Password (set on installation of EMIS Web) is required, if Auto Logon is selected the plugin will use the credentials of the user Logged into EMIS Web on the local PC.

The EMIS Timeout (default 20 minutes) is used to define after how long of inactivity (no telephone calls) the plugin will drop the connection to the EMIS web API.

Testing

Once you have completed all the details you can test the API connection with the test button, if you have Auto Logon enabled please ensure that EMIS web is running.

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