

# Phone Manager Application Support - NetSuite

DECEMBER 2016

DOCUMENT RELEASE 5.0

APPLICATION SUPPORT



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Release 5.0 - December, 2016

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## 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.

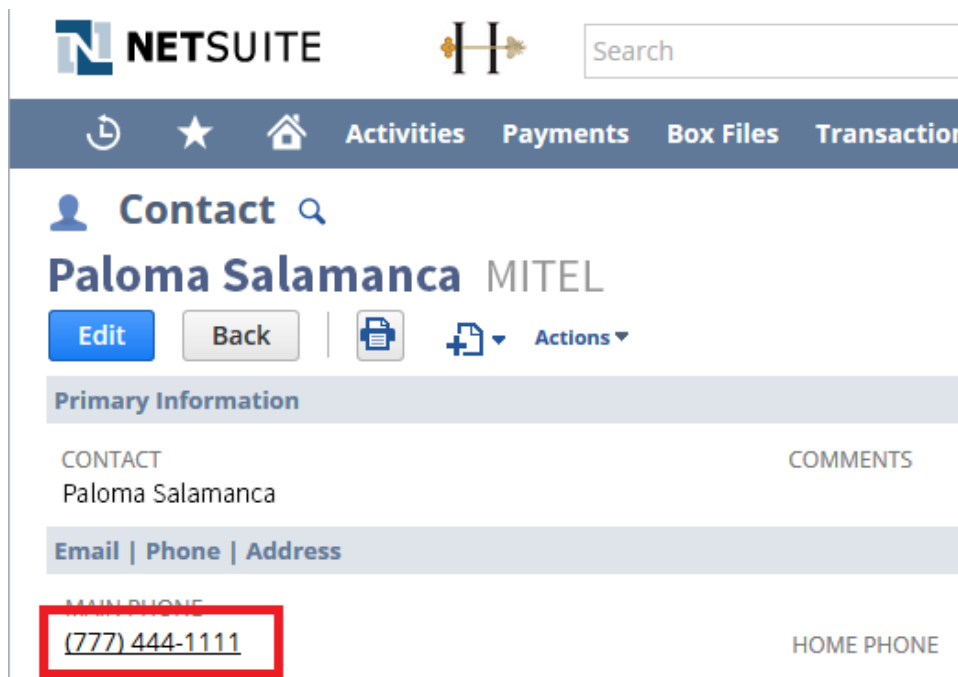
### Features

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.

**NETSUITE** | Search | Help | David Smith, Honeycomb Mfg - Administrator

Activities | Payments | Box Files | Transactions | **Lists** | Reports | Documents

**Contact** *Sarah Short* MITEL

Edit | Back | Actions

**Primary Information**

CONTACT	COMMENTS	CATEGORY
Sarah Short		
MR./MS...	<input type="checkbox"/> PRIVATE	IMAGE
NAME		
COMPANY		
MITEL		
JOB TITLE		

**Email | Phone | Address**

EMAIL	OFFICE PHONE	ADDRESS
ALT. EMAIL		
MOBILE PHONE		
MAIN PHONE		
+44 1291 430000	HOME PHONE	

**Call Log**

Phone Number	Duration
+44 1291 430000	00:02
+44 1291 430000	

Clear call

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.

**Multiple Contacts Found**

Results

- Contact: Elina Marie (ID=1648)
- Contact: Sergio Araya (ID=1649)
- Customer: MITEL (ID=1649)

Display

**Call Log**

Phone Number	Duration
+44 1291 430000	00:01
+44 1291 430000	

Clear call

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.

The screenshot shows the NetSuite interface with the 'Options' tab selected. Under the 'Screen Pop' section, both 'Customers' and 'Contacts' are checked. Under the 'New Record' section, 'Display blank record on no match' is checked, and the 'Type' dropdown menu is set to 'Contact'.

If no match is found when searching then 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.

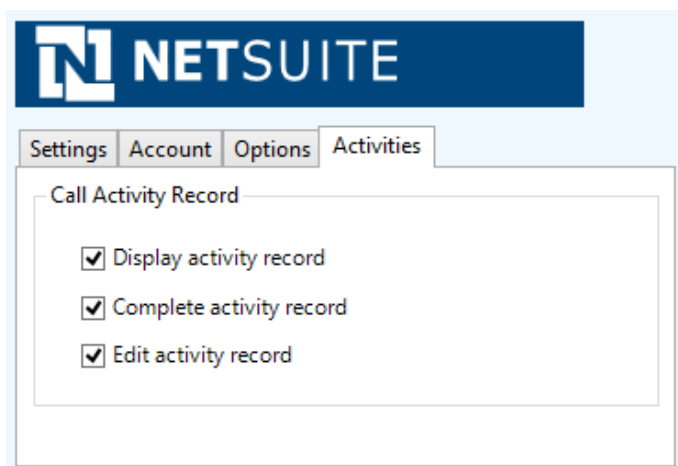
### Automatic call history entry

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](#).

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

<b>Phone number</b>	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
<b>DDI/DID</b>	For external inbound calls only, the DDI/DID number that the call came in on.
<b>DDI/DID Name</b>	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
<b>Direction</b>	The direction of the call.
<b>Account Code</b>	The account codes that was set on the call.
<b>Trunk</b>	For external calls the outside network trunk number that the call was made or received on.
<b>Transferring Extension</b>	The device that the call was transferred from.
<b>Duration</b>	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.
<b>Call Recording</b>	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.



The screenshot shows the NetSuite interface with the 'Activities' tab selected. Under the 'Call Activity Record' section, there are three checked checkboxes: 'Display activity record', 'Complete activity record', and 'Edit activity record'.

**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.

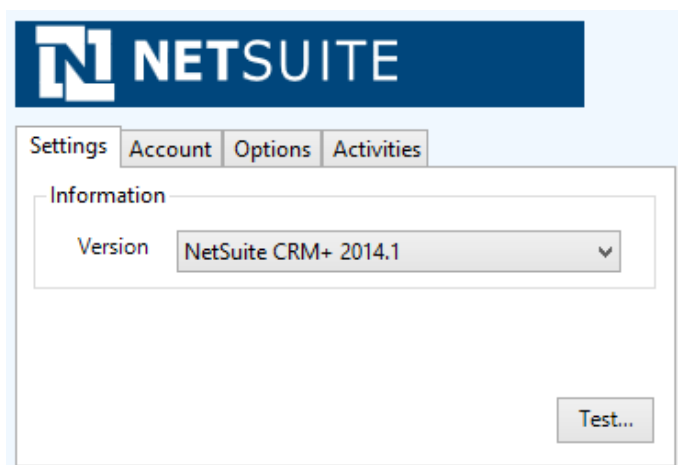
**Edit activity record:** This will open the *Activity* record in edit mode.

## 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

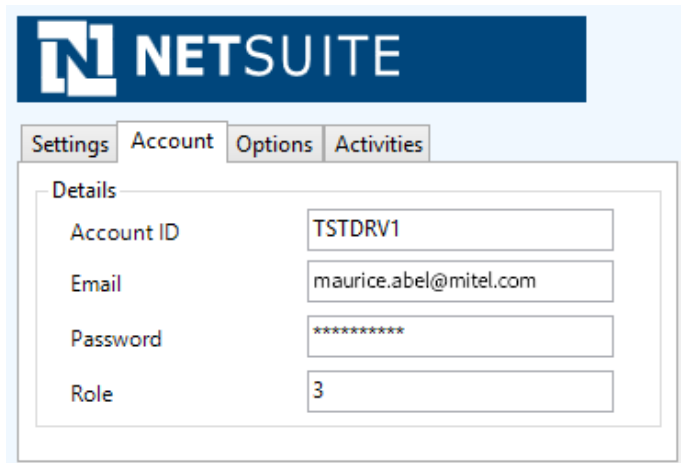
The supported version of NetSuite can be seen on the *Settings* tab.



The screenshot shows the NetSuite interface with the 'Settings' tab selected. Under the 'Information' section, the 'Version' is set to 'NetSuite CRM+ 2014.1'. There is a 'Test...' button at the bottom right.

### 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 .

## 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 Services* 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.



Search

Activities Payments Box Files Transactions Lists Reports

Set Preferences

Save

Cancel

Reset

General Appearance Transactions Analytics Activities Alerts **Telephony** Reports

TELEPHONY OPTION

CTI

TAPI DEVICE

CTI URL

tel://{phone}

DETECT TO DIAL OUT