Phone Manager User Guide

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USER GUIDE

Mitel

Mitel Phone Manager
Release 5.0 - December, 2016

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1 What's New

Version 5.0

Conferencing

This feature allows users to easily create Ad-hoc conferences using Phone Manager. The Call Banner has new 'Add Party' and 'Merge' buttons to simplify the conferencing process.

Link to Conferencing section

Hand Off (Push / Pull)

Through the Call Banner, Phone Manager now offers direct access to the Hand Off features of the telephone system. User can now Push/Pull calls between devices with the click of a button.

Link to Hand Off section

Toolbar Improvements

The integrated toolbar buttons now show a status icon to display current status. This includes displaying the status of any state holding feature code on the telephone system.

Link to Toolbar section

Version 4.3

This release of Mitel Phone Manager sees the introduction of Presence Profiles for controlling status and Dynamic Extension Express features of the MiVoice Office 250.

Presence Profiles

This feature allows users to control their phone's status with a single profile which is visible to other users of the system. Profiles also give users control over the DEE features of the telephone system.

Link to Presence Profiles section

Status on Lock

Phone Manager can now automatically switch profile or activate DND when the local computer locks. Any status change is then reverted when the computer unlocks.

Link to Status on Lock section

Windows 10 Support

Phone Manager now supports Windows 10

Ability to hide Chat conversations

Chat conversations can now be hidden from the Chat window to reduce the number of conversations visible.

Link to Chat section

Profile Pictures

Each user can now set a personal profile picture which will be stored centrally on the server and will be visible to all Phone Manager users.

Link to Profile Picture section

Phone Manager Mobile

There is now an option Mobile version of Phone Manager available for iOS and Android devices. The Mobile client includes:

- Softphone
- Directory Access
- Voicemail, Call Routing & Missed Call notifications
- Call History
- Visibility of Contacts

see Phone Manager Mobile manual

Version 4.2

This release of Mitel Phone Manager sees the introduction of the MiContact Centre Campaign Manager client UI along with other enhancements to give users more control over their Mitel extension.

Campaign Manager

Phone Manager provides the client UI for the MiContact Centre Campaign Manager progressive dialling solution

Link to Campaign Manager section

UCD Control

Phone Manager shows the associated extension's current UCD status and provides the ability to toggle between and accepting or not accepting UCD calls.

Link to UCD section

Toaster Updates

Access to the Dial Pad and to Mute a call is now provided directly from the toaster while on a call.

Link to Toaster section

Phone Manager Version 3 Contact Import

For users upgrading from Phone Manager Version 3 there is now the option to import existing contacts from the personal directory.

Link to Contacts Import section

Additional Plugin Support

Support for the following plugins have been added:

Link to Internet Explorer Plugin

Link to Netsuite Plugin

Link to SugarCRM Plugin

Link to Tigerpaw CRM

Link to Zoho CRM Plugin

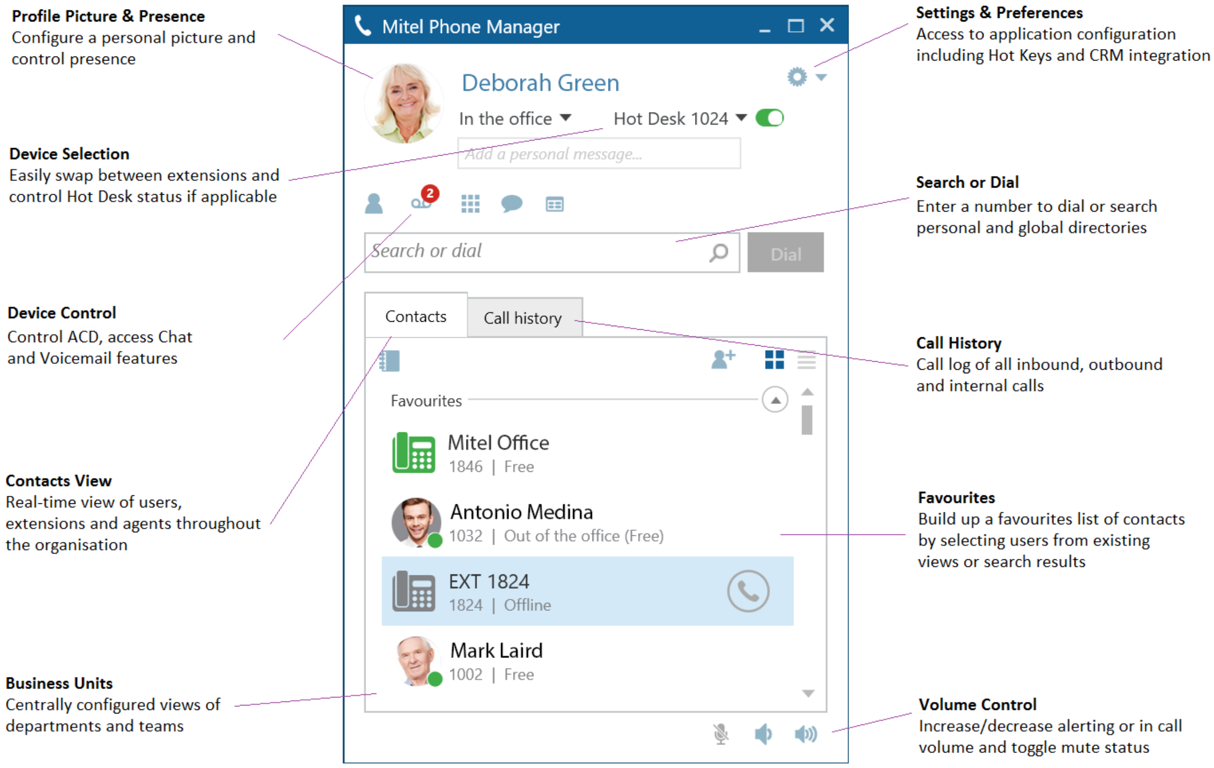
1.1 Known Issues

DPAR/ID	Description	Notes/Work around
12706	Phone Manager cannot connect to the Communication Service through a web proxy.	The Communication Service hostname and/or IP address needs to be added to the relevant exclusion list on the proxy server to enable Phone Manager to connect.
13506	Placing a SIP Softphone call on hold longer than about 14 minutes will caused the call to be disconnected after this time.	Don't leave SIP calls on hold longer than 14 minutes.
14553	Enabling the download of Microsoft Outlook contacts can prevent users from receiving emails when Outlook is configured in cached mode.	Disable the cache mode option within Microsoft Outlook (https://support.office.com/en-US/article/Turn-on-or-off-Cached-Exchange-Mode-e8966ca4-6ecd-4bdd-ade2-64993dda432b).

2 Quick Start

The guide provides information for frequently used features. For more information about these and other features, refer to the user guide.

Phone Manager UI with Presence Profiles



Phone Manager UI without Presence Profiles

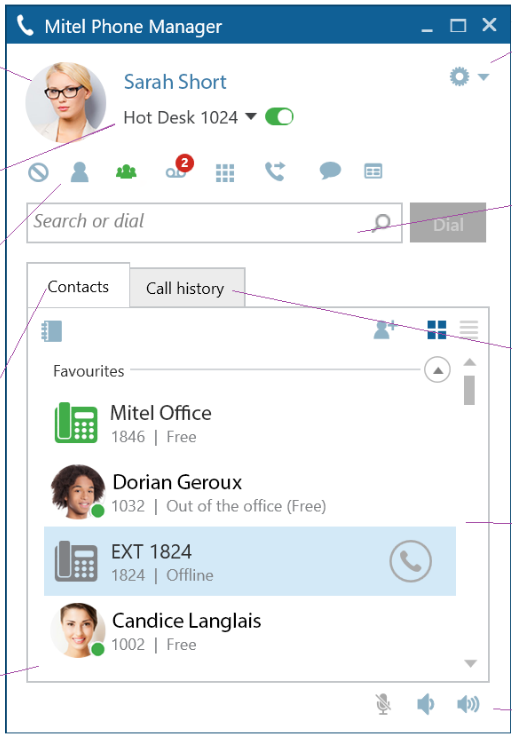
Profile Picture
Configure a personal picture

Device Selection
Easily swap between extensions and control Hot Desk status if applicable

Device Control
Control ACD, access Chat and Voicemail features

Contacts View
Real-time view of users, extensions and agents throughout the organisation

Business Units
Centrally configured views of departments and teams



Settings & Preferences
Access to application configuration including Hot Keys and CRM integration

Search or Dial
Enter a number to dial or search personal and global directories

Call History
Call log of all inbound, outbound and internal calls

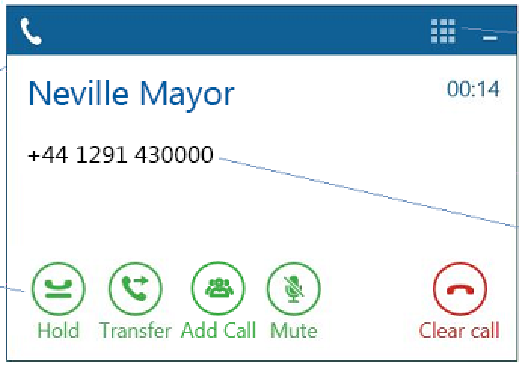
Favourites
Build up a favourites list of contacts by selecting users from existing views or search results

Volume Control
Increase/decrease alerting or in call volume and toggle mute status

Phone Manager Call Banner

Call Banner
Visible whenever a call is in progress or ringing at the extension

Call control
Use the call control functions to clear, hold/retrieve or transfer the call.



Dial pad
Use this icon to access the dial pad if you need to enter DTMF Tones on a call

Call details
The main body of the toaster shows details about the current call

Using the Call Banner

If there are any calls at the extension then the Call Banner will appear, this provides control for features such as Hold/Retrieve, Transferring, Answering and Clearing calls. If there is more than one call at the extension the banner will expand to display the different calls and provide a means to swap between them.

Call Banner Buttons

Button	Action
	Answers an inbound ringing call
	Clears a connected call
	Toggles a connected call between hold and connected state
	Offers the ability to divert an inbound call to voicemail or chosen destination
	Provides the ability to setup an announced transfer
	Provides the ability to setup an ad hoc conference
	When performing a consultation transfer, these buttons can be used to complete or cancel the transfer
	Used to toggle the mute state of a connected call
	This button can be used to pull back a call that has routed through the telephone system to an external number (Home, Mobile etc..)
	This button can be used to push a connected call out to another one of your devices
	This icon will display when making outbound calls and the phone system is ringing multiple devices to find the person you are calling

Making Calls

Making calls using Phone Manager is a simple process and can be achieved in a number of different ways:

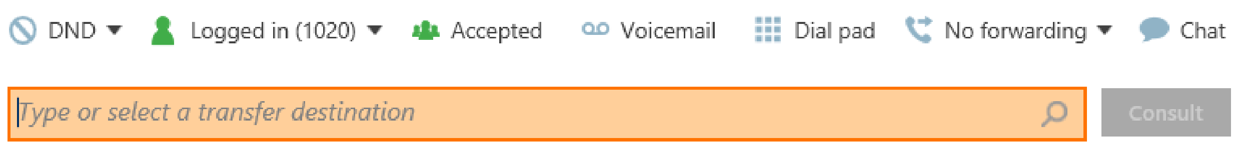
- Dial a number you know by entering it into the Search or Dial box and press enter
- Dial a user or device from the Contacts window by double clicking or pressing the dial icon next to it
- Search the directory by entering a name in the Search or Dial box to find a number to dial
- Highlight a number in a different application and double click the Highlight & Dial icon which can be found on the right hand side of you screen

Transferring Calls

Calls can be transferred by using the buttons on the call banner. The main Phone Manager Search or Dial or the Contacts Window should be used for choosing the transfer destination. After pressing Transfer on the Call Banner the main Phone Manager window will be brought into focus ready for you to enter a number to dial.

Alternatively, dialling a number using any of the make call methods described above when a call is in progress will automatically setup a consultation transfer without having to first press a button on the Call Banner.

When performing a consultation transfer it can be completed or cancelled using the relevant buttons on the Call Banner or simply hand up to complete.



Contacts View

The contacts tab within Phone Manager provides a real-time view of information about other devices including users, extensions, agents, speed dials and hunt groups. This gives an overview of the status of these devices and call control features such as single click to dial.

The views available include a personal favourites view and centralised business units that have been configured on the server. Use the binder icon to hide or show different views.

Icons	Description
	User icon, This icon appears on the Large view of the contact screen. The users status shows in the circle in the bottom right-hand corner. The user profile image will display in the large circle. If the user has no profile picture then the icons below will be used
	User icon, an outlined icon means the user does not have Phone Manager running. These icons are visible on the Details view of the contacts screen
	Extension icon
	Agent icon
	Directory Contacts (Global or Personal Directory, Phone System Directory, Outlook Directory)

Colour Key: Grey - Offline, Green - Available, Red - Busy, Blue - Do not disturb, Yellow - Wrap up

A user who has privacy enabled may show xxxx in the extension and Caller ID fields.

Application Buttons

Button	Action
	Highlight & Dial, this icon can be found attached the right hand side of the desktop and can be used to dial numbers from other applications. Highlight a number to dial in another application and double-click the icon
**	DND, provides control of do not disturb status and displays the current status
**	ACD*, provides control of ACD Hunt Group status and displays the current status
**	UCD*, provides control of UCD Hunt Group status and displays the current status
3	Voicemail, provides access to voicemail boxes that notify the local extension and indicates how many messages are waiting
	Dial Pad, provides access to the Dial Pad which can be used to initiate calls or more commonly to dial DTMF Tones over an existing call
**	Forward, provides control of the forward state of the local extension and displays the current status
	Provides access to the Chat window and to see existing conversations
	Binder, controls visibility of different Contact views
	Can be used to add new contacts to personal or global directories
	Used to switch the view on the Contact window between large icon and details view
	Mute, controls the mute status of the local extension when a call is in progress
	Volume controls, used to change the alerting volume when idle and the call volume when a call is in progress
	Settings, provides access to the setting area of the application to change things like Hot Keys, CRM integration and personal preferences
	Hot Desking Toggle, if the associated extension is a Hot Desk Profile then this toggle switch will display to control and display Hot Desk status
	Toolbars*, launch one or more centrally assigned toolbars to help perform common telephony tasks
	Campaign Manager*, launch the client UI for MiContact Centre Campaign Manager to make and disposition outbound dialler calls

* This icon will only appear when licensed and/or when configured to appear by an administrator.
** These icons only appear when NOT using Presence Profiles.

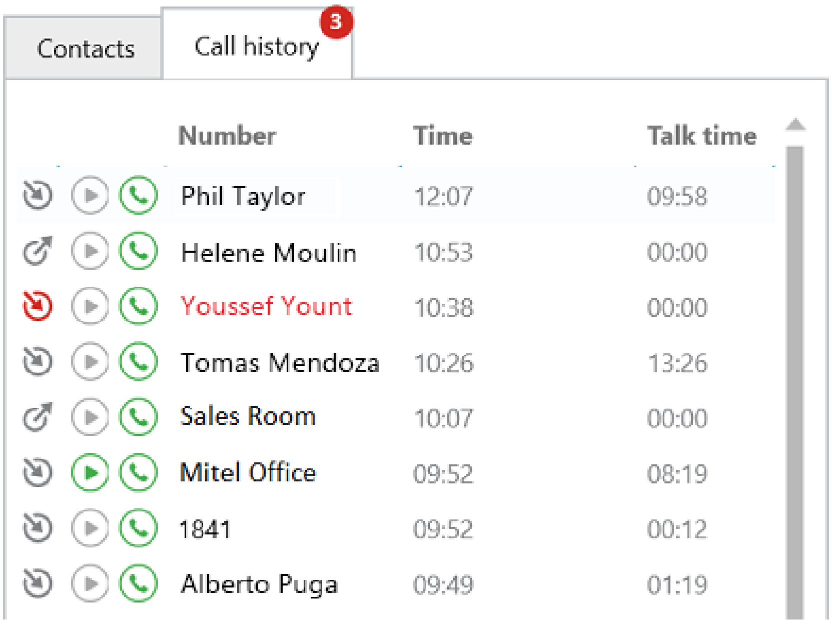
Call History

The Call History window shows all internal, external and missed calls on all of your assigned devices.

When the Call History window is not open, any missed calls will be notified with a red circle on the tab. Calls can be returned by pressing the handset icon.

A history of any calls made to or by any of the devices associated with your user account will be displayed. To see additional information regarding calls expand the Phone Manager application to full screen.

Right clicking on a history line allows you to add the contact to your directory.



Icons

Button	Action
	Inbound call that was answered *(This includes calls answered by voicemail and in the case of DEE calls answered by other devices in the DEE group)*
	Inbound call that was missed
	Outbound call
	Redial, used to call back a number on the call history. If this icon is greyed out there is no number available to redial
	Playback**, used to playback a recording of external calls

** Only available in conjunction with a MiVoice Office Call Recorder or Xarios Call Recorder

3 Overview

Phone Manager is designed to make using your Mitel MiVoice Office 250 handset as easy as possible. This document is designed to outline the features of Phone Manager and help you get the most out of the product.

Phone Manager requires an instance of Mitel Communication Service (MCS) with the Application Server role supporting Phone Manager clients, installed and running on the Local Area Network (LAN). The licensing for the product and many of the features is controlled via the Application Server so you may need to contact your IT department or phone system supplier for help should any of the features described in this document require a license.

Phone Manager runs in a Microsoft ® Windows environment and is designed to improve your productivity by integrating the use of your MiVoice Office 250 phone with your PC and the various software applications you use to function well within your team.

3.1 Requirements

Overview

The system requires specific information and requirements to be met for any installation. Read each of the sections and ensure that the information requested is available prior to an installation.

System Requirements

To be able to install and run Phone Manager the client computer needs to meet the following **minimum** requirements. If installing into a multi user environment where multiple instances of the client will be running, for example Microsoft Terminal Service, Citrix etc. then see the Multi User Computer Requirements section.

Operating Systems

- Windows 7 Pro/Enterprise/Ultimate 32-bit/64-bit
- Windows 8.1 Pro 32-bit/64-bit
- Windows 10 Pro/Enterprise 32-bit/64-bit
- Windows 2008 R2 Standard/Enterprise/Datacenter 32-bit/64-bit
- Windows 2012 R2 Standard/Datacenter 64-bit
- Windows 2016 Standard/Datacenter 64-bit

> Windows Server Core installations are not supported.
> Windows Server Small Business/Foundation/Essential versions are not supported.

Hardware Requirements

The minimum recommended hardware is dependent on the number of devices configured on the PBX and the number of clients that will be connected.

Processor	Intel Core 2 Duo 1.8GHz or faster processor (or equivalent)
Memory	Minimum: 1GB RAM Recommended: 2GB RAM or more When Phone Manager is running it will use a minimum of 70MB of RAM per client - this can be significantly more depending on configuration and number of devices and/or users on the system.
Network	IPv4, 100Mb / 1Gb LAN
Hard Disk	Minimum: 20GB free space
Graphics	Minimum: DirectX v9 compatibly graphics cards with 120MB RAM Recommended: DirectX v9 compatibly graphics cards with 1024MB RAM

Software Requirements

The following software is required to be installed.

- .NET Framework 4.5.2

Multi Users & Virtual Desktop System Requirements

Phone Manager can be run in multi user and virtual desktop environments such as Microsoft Terminal/Remote Desktop Services, Citrix XenApp or VMWare Virtual Desktop Infrastructure (VDI) with the following limitations:

- The 1st Party TAPI drivers is not supported
- Phone Manager Softphone is not supported

When deploying in these environments then the amount of memory, CPU usage and Video resource that Phone Manager will use needs to be determined. As the resources required are dependent on configuration and the number of devices and Users in the system then this needs to be benchmarked first to ensure the number of concurrent Users can be supported on the hardware available.

3.2 Licensing

Phone Manager is available in several different license levels. When you connect to the Communication Service a license will be assigned to you based on the *Client Profile* assigned to your User account on the server.

All clients provide the following features:

- Standard Features: Legacy support only. Provides call control features, call history & status visibility of contacts (only possible following an upgrade from Release 3).
- Outlook Features: As well as Standard features, adds the additional functionality of screen popping and populating call history journal inside Microsoft Outlook as well as dialling contacts and auto-creating MiVoice Office 250 Meet Me Conference appointments.
- Professional Features: As well as Outlook license features, adds the additional functionality of integrating with many other CRM applications. Adds TAPI & .NET API access and supports custom Macro design.
- Team Leader Features**:** As well as Professional license features, adds the ability to silent monitor other users and control their ACD group status, DND and call forward status.

3.3 License Comparison

Feature	Standard	Outlook	Professional	Team Leader
Call control up to 4 calls	✓	✓	✓	✓
Highlight & Dial	✓	✓	✓	✓
Desktop presence	✓	✓	✓	✓
Call history	✓	✓	✓	✓
Do not disturb & Forward Control	✓	✓	✓	✓
Instant Messaging (chat)	✓	✓	✓	✓
Personal Directory	✓	✓	✓	✓
Call Recorder Playback*	✓	✓	✓	✓
Group Mailbox Notification	✓	✓	✓	✓
Profile Images	✓	✓	✓	✓
Presence Profiles	✓	✓	✓	✓
Hot Keys	✗	✓	✓	✓
Call banners including profiles	✗	✓	✓	✓
Softphone	✗	✓	✓	✓
UCD Control	✗	✗	✓	✓
ACD Control	✗	✗	✓	✓
Integrated Toolbar	✗	✗	✓	✓
Full Toolbar	✗	✗	✓	✓
TAPI (1st Party)	✗	✗	✓	✓
Macros	✗	✗	✓	✓
Application Support	✗	Outlook Only	✓	✓
API Access (.NET/VB)	✗	✗	✓	✓

Campaign Manager Client	✗	✗	✓	✓
Alarm Notification	✗	✗	✗	✓
Hunt Group Status	✗	✗	✗	✓
3rd Party ACD, DND & FWD Control	✗	✗	✗	✓
Silent Monitoring	✗	✗	✗	✓

3.4 Configuration

Connection Details

Phone Manager requires a basic level of configuration to get it connected to the Communication Service and controlling your extension. The following information is required when Phone Manager starts up:

Host address	This is the IP address or hostname of the server running the Communication Service software. Phone Manager will try and find this automatically on start-up. If it does not find an Communication Service or it finds more than one then some user interaction is required to confirm the connection details.
User Credentials	Phone Manager needs to connect to the Communication Service with a user account. By default, it will use the account you are logged into your PC with to authenticate. If you wish to override this you can do so in the Connection settings section.
Extension	Phone Manager requires the details of the extension you are using when it starts up so that it can show the correct call information. There are several of ways of providing Phone Manager with this information. Please read through the Connection settings section for more details.

Server Connection

The first time Phone Manager starts up it will broadcast to try and find the Communication Service. If it doesn't find one or if it finds more than one the user will be able to select the correct one to use. Select the correct server from the **Available hosts** list or enter the IP address or hostname of the server you wish Phone Manager to connect to in the **Host address** field.

When Phone Manager starts it will use the Windows account details of the current logged in user. If this is not appropriate then check the **Override login details** and enter the **Username** and **Password** to use instead. (This might be necessary if for example you connect to the office from your home PC).

If the User account is linked to a Microsoft Active Directory User account then enter the username in the DOMAIN\User format, otherwise use the username and password provided by your administrator. By default the username is your extension number and leave the password blank to use the default value.

4 Outlook Features

The following section covers the features that are available in the Microsoft Outlook licensed version of Phone Manager. The specific Microsoft Outlook features that are provided are:

Call Control	How to make and transfer calls. How to handle multiple calls and tell the difference between different types of call.
Extension Control	Controlling the state of your extension. Forward states, Do Not Disturb and ACD Agent control. Volume Control and Voicemail access.
Contacts	View the status of other users within the organisation. Searching for internal and external contacts and using the contacts view to manage favourites and speed up communications.
Call History	Track all calls you make on the system and optionally play them back (requires Call Recording integration license).
Chat	Communicate with other users inside the organisation using chat/instant messaging.
Directory Integration	Outlook contacts can be linked into the Phone Manager directory and displayed on the toaster.
Screen Popping	Outlook contacts can be screen popped.
Call History	Outlook contacts can have call history (journal entries) created.
Calendar / DND Synchronisation	Outlook calendar can be used to automatically synchronise the User's DND state with their calendar items.

This license also provides:

Hot Keys	Configure global hotkeys to automate common telephony tasks.
Call Banner Profiles	Toaster support for custom banner profiles.
Softphone	Support for connecting as a softphone (Requires a softphone license).
Integrated Toolbar	Only available when connected as a softphone. This provides 5 buttons that can be customised on the main window.

4.1 Call Control

Overview

Making and receiving calls is obviously the primary purpose of a telephone. Phone Manager makes this process as simple and efficient as possible, providing you with context sensitive action buttons and giving you all the information you need about the calls you are on.

Making Calls	How to dial internal and external numbers.
Highlight & Dial	Dialling from within other applications.
Toaster	Seeing details about the call you are on and performing common tasks such as putting calls on hold, retrieving calls and clearing calls.
Transferring	Performing supervised/announced or direct transfers.
Multiple Calls	How to handle multiple calls at your extension.
Dial Pad	Dialling out with the dial pad or dialling DTMF digits over a call to navigate through an attendant or IVR.
Uri Schemes	Click to Dial URI schemes

4.1.1 Making Calls

Making a call to a number is a simple process that can be achieved a number of different ways.

Dialling a number you know

If you know the number you wish to dial, whether it is another extension internally or an external number then simply enter the number into the *Search or Dial* box and hit the enter key or press the 'Dial' button to make your extension dial the number.

If you are dialling an external number there is no need to worry about adding in any additional digits to get an outside line or worrying about area codes as this will be done automatically as per the configuration in the server.

Dialling from the contacts screen

If you want to dial another user within your organisation or a contact that is stored in a global or personal directory you simply need to click the dial icon next to their status icon on the contacts screen or double click the status icon itself. If the contact to dial is not currently visible start entering their name into the *Search or Dial* box to bring up a list of matching contacts.

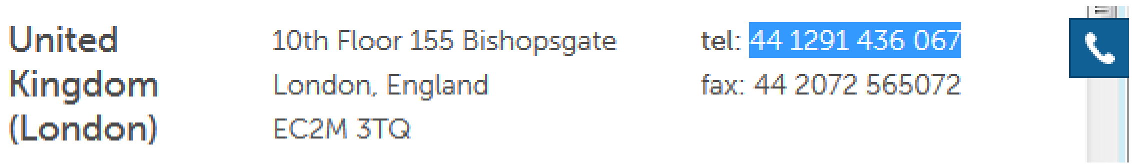
> If you dial a contact while you are already on a call with someone else, Phone Manager will automatically set up a consultation/enquiry call for you.

4.1.2 Highlight & Dial

Dialling from another application (Highlight & Dial)

Often you will have the need to dial a number from another application. Commonly this will be a web page that you want to dial the contact details from or an email someone has sent you.

To do this you can use the Highlight & Dial features of Phone Manager. Simply highlight the number you wish to dial and then double click on the Highlight & Dial button or use a Highlight & Dial hot key (See the Hot Keys section for details). You will find the Highlight & Dial button docked to the right-hand side of your screen.



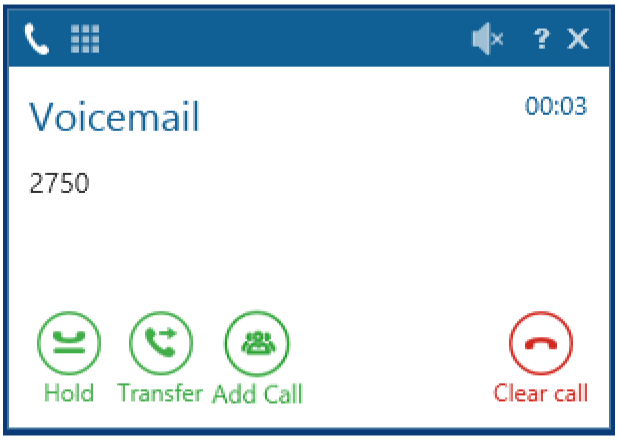
You can move the Highlight & Dial button up or down the screen to suit your requirements.

Generally as long as the number can be copied to and pasted from the Windows clipboard then this should work. This can be tested by highlighting the telephone number and pressing Ctrl+C and then opening Notepad and pressing Ctrl+V. If the number appears then the test was successful.

> ⚠ Some 3rd party applications can perform their own clipboard control causing highlight and dial to not function correctly. Testing with a Phone Manager client is recommended to ensure full compatibility.

4.1.3 Toaster

The toaster window will appear whenever a call is in progress at your extension. It is designed to give you all the details you need about the call in progress and provide you with context sensitive buttons to perform actions on those calls such as hold or retrieving a call.



Context Sensitive Buttons

The following buttons will appear at different times on the toaster depending on the status of the call.

Clear call	Use this button to hang up on a call. If you have the handset of the telephone in your hand you will be disconnected from the remote party but will be left with a connection to the telephone system.
Answer call	Use this button to answer an incoming call.
Hold Retrieve	These hold and retrieve buttons will appear once a call is in progress. If you hold a call by pressing the hold button on the toaster or on the telephone itself, the hold button will be replaced with a retrieve button to allow you to pick the call back up.
Divert	This option is displayed on incoming ringing calls. Use the divert to send an unwanted call to another destination.
Send to voicemail	This option is displayed on incoming ringing calls. Use the send to voicemail option to send an unwanted call to your voicemail mailbox.
Transfer Consult	There are 2 ways of transferring a call to another location. Using the transfer option will move the call to another location immediately. The consultation option will allow you to speak to someone at the other location first before putting the call through.

	These options are available if you have set up a consultation call. To complete the transfer hang up the handset of the telephone or press the complete button. To go back to the original call press the cancel button.

4.1.4 Transferring

Transferring a call can be done in several different ways depending on whether you want to transfer an answered call directly (blind transfer) or by announced transfer. Alternatively if the call is ringing, then you can divert the call before answer.

Transfers

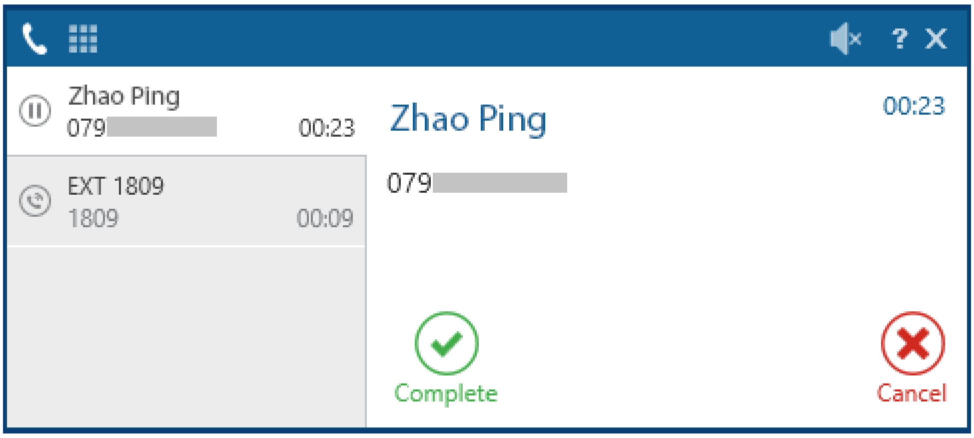
When connected to a call, context sensitive toaster action buttons appear to offer the user the system features that are possible at the time.

> ⚠ Softphone does not support transferring a connected call straight to a Voicemail box

Announced Transfer

To perform an announced transfer a consultation call needs to be set up before transferring the call. Whilst on a call click on the *Transfer* button and this will give focus to the main window with the cursor in the *Search or Dial* box, or go direct to the main window and find the contact, or use the hot key for *Directory Search*. Use any of these methods to find the contact to transfer the call to in the main contact window.

Once the contact has been found, dial them and this will set up the consultation call. For example this shows a consultation call made to extension 1801.

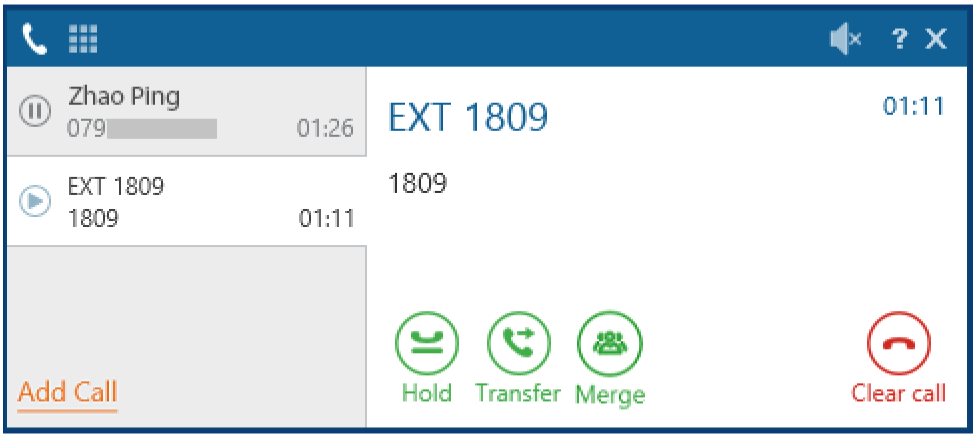


As there are multiple calls at the extension now the summary panel appears to the left of the toaster. This shows all the calls at the current extension and clicking on each call will update the details on the right hand side with the relevant information for the call selected.

The consultation call has not been answered yet but the transfer can be completed at any time by clicking on the *Complete* button.

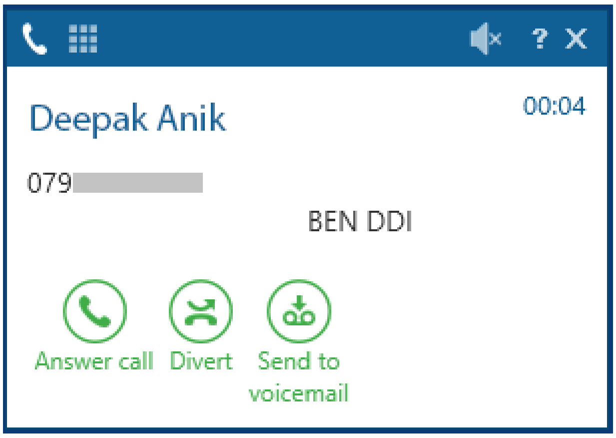
To cancel the consultation call and not perform the transfer to this contact, click on the *Cancel* button (shown above). This will then clear the consultation call and connect you back to the original call.

Alternatively swap over to the enquiry call and click on the *End* button shown below. This will cause the original call to be left on hold and would need to be manually retrieved.



Divert

When a call is ringing the toaster action buttons change to reflect what you can do with this call.



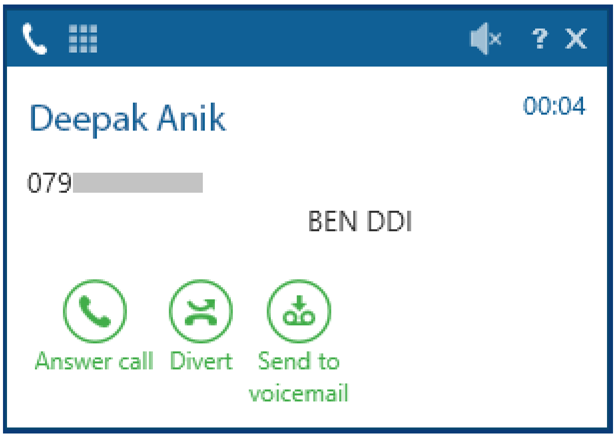
To divert a call click on the *Divert* button and this will give focus to the main window with the cursor in the *Search or Dial* box. Search for the contact to divert the call to and click on the dial button next to their icon (or highlight it and press *Enter)* or type in the number in the *Search or Dial* box and click on *Dial*. The call will then be sent straight to this contact and the call will clear from your extension.

The toaster also provides a *Send to voicemail* button that enables a single click divert of a call to voicemail.

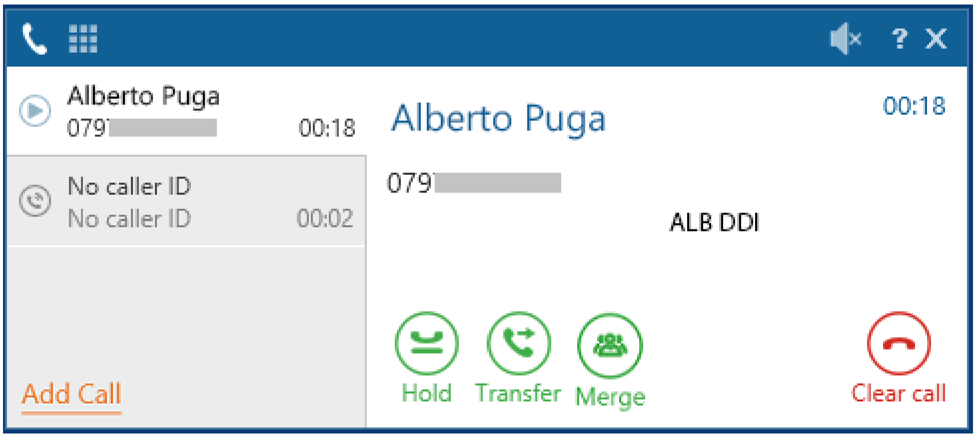
4.1.5 Multiple Calls

The toaster popup will show multiple calls at an extension by expanding to the left with a summary pane that lists all of the calls in progress. Clicking on the entry for a specific call will update the details on the right hand side with the relevant information for the call selected.

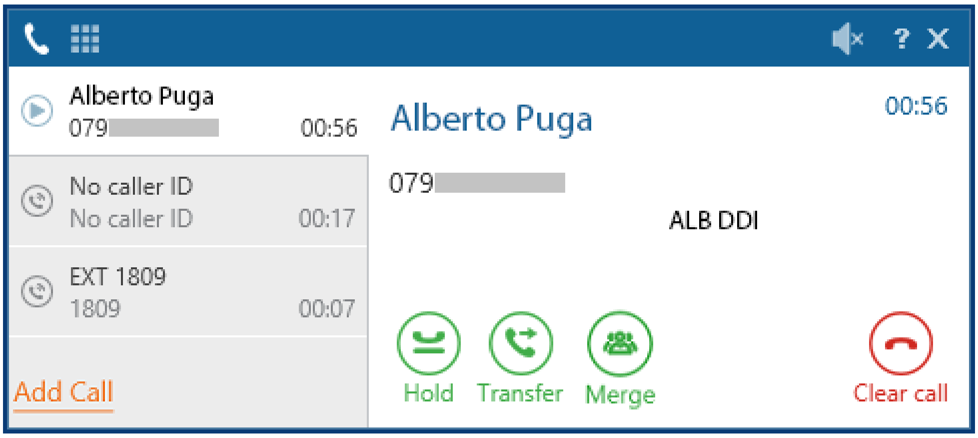
For a single call the toaster will be shown without the summary pane.



If a second call comes in the then toaster will expand with the summary pane. This example shows the first call as connected and the second call is ringing.



If a third call comes in then this gets added. In this example the first call is connected and the second and third calls are ringing.



Next to each call in the summary pane the icon to the left reflects the state of the call.

	Call connected
	Call ringing

⏸	Call on hold

4.1.6 Conferencing

Sometimes there is a requirement to include more than one other person on a telephone conversation, this is called conferencing. There are two ways the telephone system supports conferencing:

- Meet-Me Conference -> A conference bridge that you dial into with a specific code
- Ad-hoc Conference -> Choose the people to include in the conference from your telephone

Phone Manager provides an easy way to access either of these two features.

Meet-Me Conferencing

To join a Meet-Me conference, dial the systems' Conference Assistant and then enter the PIN for the conference you wish to join.

If you have been invited to join a conference you will have been given the PIN of the person who invited you. If you are joining your own bridge then unless you have been told otherwise your PIN will usually be the same as your extension number.

Once you have joined a Meet-Me Conference, additional parties can be added using the Ad-hoc method below.

> If you don't know the Conference Assistant number then search for 'Conference Assistant' in the search or dial area of the Phone Manager UI

Ad-Hoc Conferencing

Conferences can be created on the fly using the 'Add Party' and 'Merge' buttons on the Call Banner. To start an ad-hoc conference, follow these steps:

1. Ring the first person to be included in the conference.
2. Once they answer, press the 'Add Party' button on the Call Banner.
3. The call will be placed on hold and focus will be taken to the Phone Manager UI.
4. Dial the next person, this can be done by dialling someone directly from the Contacts screen or by entering a number in the Search or Dial section
5. When the next call answers either press 'Merge' on the Call Banner to bring the calls into a conference or press 'Add Party' and repeat steps 2 to 5 bring more people into the conference.

Depending on the time taken to setup up all the calls, the first call may start recalling from its 'On hold' status. If this happens the call needs to be answered and held again to allow it to be conferenced.

Once a conference is in place a single entry will appear on the Call Banner with the number of parties in the conference in brackets after.

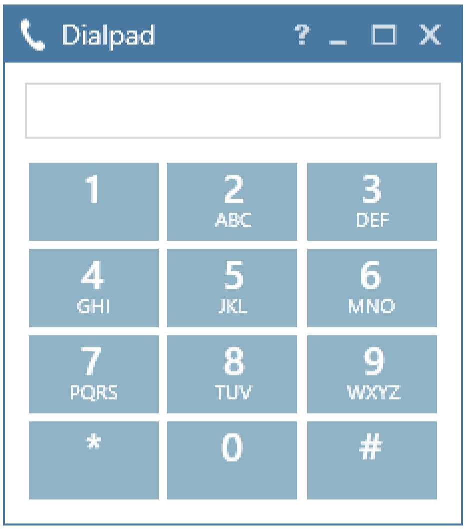
> Depending on how the telephone system is configured, the limit to the number of parties in an Ad-hoc conference will be either 4 or 8.

> Once a Conference is in progress, steps 2 to 5 can be repeated again to add addition people.

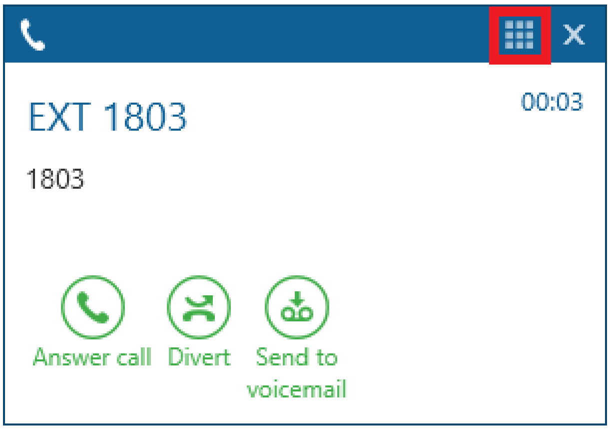
> ⚠ Pressing 'Merge' will add all calls that are currently 'On hold' or 'In progress' at the current extension into the conference. Calls that are ringing will not be added.

4.1.7 Dial Pad

The dial pad can be used for dialling numbers or for navigating Auto Attendants or Interactive Voice Response (IVR) systems. This can be opened all the time by clicking onto the dial pad icon from the main window.



Alternatively whilst on a call click on the dial pad icon from the toaster window to display the dial pad window.



In order to ensure that the normal use of numeric keys on your computer doesn't interfere with a call, DTMF tones will only be sent over a call whilst the Dial Pad window or toaster has focus.

4.1.8 URI Schemes

Phone Manager supports a range of different well known URI schemes that enable applications to be able to do direct click to dial by turning the telephone numbers into hyperlinks. For example if an application wraps the telephone number into this format:

tel://01234567890

Clicking on this link will then cause this number to be dialled. The following URI formats are supported:

URI Scheme	Example
dial	dial://01234567890
sip	sip://01234567890
callto	callto://01234567890
tel	tel://01234567890
call	call://01234567890
dialfrompm	dialfrompm://01234567890

4.2 Extension Control

Overview

Phone Manager provides complete control over the status of your extension. The application can be setup to control the extension in one of two modes. The mode used is controlled on the server using the Phone Manager Client Profile.

Presence Profiles

Different profiles contain information about how a user's primary extension is setup. To change the configuration of the telephone users need only select a different profile. This form of control provides users with a simple way of controlling their configuration and can be tailored to each user's needs. It is also an essential feature when working with Phone Manager Mobile.

For more information on using Presence Profiles click here.

Direct Control

Users have direct control of the extension Phone Manager is connected to using the relevant feature buttons:

Do Not Disturb	Single click access to any of the 20 do not disturb states programmed on the telephone system to ensure you are not interrupted when busy.
UCD Hunt Group Call Control	Control of the UCD hunt group state of your extension. For example, to enable UCD hunt group calls be taken.
Manual Forwarding	Control of the local forward state of your extension. For example, divert calls to voicemail or to your mobile when busy.

Common

The following controls are common to users using Presence Profiles or Direct Control

ACD Agent Control	Login to all or selected hunt groups your ACD agent ID belongs to.
Voicemail Access	Visual indication of when you have voicemails and single access to dial into the voicemail system to retrieve them.
Volume Control	Increase or decrease the volume when ringing or during a call or mute the audio all together.

4.2.1 Do Not Disturb (DND)

When away from your desk or busy in a meeting you can set the Do Not Disturb (DND) message on your phone so other users on the MiVoice Office 250 system know your status. The PBX provides 20 predefined DND messages for you to choose from.

> These messages can be re-programmed in Database Programming on the MiVoice Office 250 system.

The "DND" icon enables users to set their DND status and changes colour to indicate what state they are currently in.

Icon	Description
	DND is not configured.
	DND is configured.

Clicking on the "DND" icon when not configured will allow the user to select the DND message to use from the 20 pre-configured messages shown. When a message has been selected then a prompt will be shown to allow the user to optionally enter up to 16 characters of DND text to supplement the DND message. For example:

"IN MEETING UNTIL – 12.30 PM"

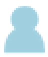
Any MiVoice Office 250 user now calling your extension or viewing your status in Phone Manager will see your DND message.

If you are in the DND state, the Phone Manager DND icon will turn red . Clicking this will toggle the DND state to off turning the icon blue . Clicking again will set DND state to on.

4.2.2 ACD Agent Control

ACD Agent IDs can be used on the MiVoice Office 250 system to log in and out of whichever ACD hunt groups you Agent ID belongs to. Each hunt group would generally indicate a different type of call to be answered or indicate a specific skill set to use for that call.

The ACD icon enables users to control their ACD status and changes colour to indicate what state they are currently in.

Icon	Description
	Logged out
	Logged in and free
	Logged in and in wrap up

When you are logged out and press the ACD icon the list of hunt groups for the agent ID that is assigned to your user account are shown. Clicking on "Login agent (xxxx)" will log into all ACD groups that this agent ID is a member of. Alternatively select the specific hunt group that you wish to login by clicking on the group.

To use a different agent ID click on the "Login with agent ID" option and then enter the ID in the box shown and this will log the agent into all groups. The list of individual hunt groups will then be updated for this agent ID to enable specific groups to be logged out of.

While logged in a tick will show against all hunt groups that you are logged into. The menu can then be used to login or out of any of the other groups at any time.

> The ACD icon will only be displayed if the user has the "Enable ACD control" flag set against their *Client Profile*.

> When using ACD agents with the Softphone it is recommended to enable the **Auto agent login/logout** setting in the users *Client Profile*. If an agent is logged into a Softphone and is not connected then users may receive a "destination not responding" message if they dial a hunt group they are a member. Other OAI applications may also display the agent in a constant ringing state.

4.2.3 UCD Hunt Group Calls

UCD hunt groups can be used on the MiVoice Office 250 system to route calls to groups of extensions. Each hunt group would generally indicate a different type of call to be answered or indicate a specific skill set to use for that call.

The "Hunt Group Calls" icon enables users to toggle their UCD status and changes colour to indicate what state they are currently in.

Icon	Description
	UCD hunt group calls will not be presented.
	UCD hunt group calls will be presented.

The UCD icon will only be displayed if the user has the "Enable UCD control" flag set against their *Client Profile*.

4.2.4 Manual Forward

Your extension can have a manual forward set to divert calls to another destination under different circumstances. The various forward states available to choose from are:

State	Description
No Answer	Forward calls when you don’t answer them. The default no answer time on the PBX is 15 seconds (This system wide timer can be changed)
Busy	Forward calls only when your extension is busy.
No Answer Busy	This option is a combination of the first two options.
All Calls	Forward all calls that alert you extension immediately.

The "Forward calls" icon enables users to set their forward status and changes colour to indicate what state they are currently in.

Icon	Description
	No forwarding is configured.
	Forwarding is configured.

Clicking on the "Forward calls" icon when no forwarding is configured will allow the user to select 1 of the 4 options available. A text input box will then appear to prompt for a forward destination. In this box you can enter an internal or external number such as a mobile phone number (if external remember to include the number to access an outside line).

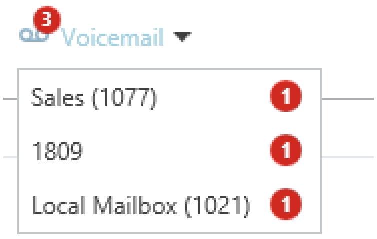
If the forward state is already configured, then clicking on the icon will remove the forward setting from your extension.

> The MiVoice Office 250 system also supports pre-programmed forward rules called "System Forwarding". Manual Forwarding will override any System Forwarding rules you may have set.

4.2.5 Voice Mail Access

The "Voicemail" icon shows a red badge indication with the number of voice or extension messages that have been left for each different one. Clicking on the icon displays a list of the messages and selecting the individual one will either dial into the correct mailbox or call the extension that left the message.

In this example there are 3 messages.



- **Sales (1077):** is a voicemail for an un-associated mailbox with the notification extension set to this users.
- **1809**: is an extension message left from extension 1809.
- **Local Mailbox (1021):** is a voicemail for an associated mailbox for this extension.

When there are no outstanding messages then there will be no red badge indication shown.

4.2.6 Volume Control

The volume functions behave differently depending on whether Phone Manager is associated with your extension phone (Desk Phone) or in SIP softphone mode.

extension Volume control

The volume of your extension phone can be controlled using the mute , volume increase and volume decrease icons at the bottom right of the main window.

When controlling a Mitel extension desk phone these icons are grouped together in the bottom right corner like this

Depending on the state of your extension the icons will do different things:

Idle or Ringing State	Mute will be disabled.
	Volume decrease will decrease the **ringing** volume and save it.
	Volume increase will increase the **ringing** volume and save it.
Call in progress on the handset	Mute will be enabled.
	Volume decrease will decrease the **handset** volume and save it.
	Volume increase will increase the **handset** volume and save it.

Additional types of call in progress include Hands Free and Headset and the volume control will apply independently to each type of audio call.

When the mute icon is pressed it will turn blue to indicate that audio is now muted on the call. To turn mute off simply click on the icon again.

Softphone Volume

The volume controls are enhanced to include a slide control when connected as a softphone. This offers a greater level of control than when Phone Manager is controlling an extension and look like this:

When using the volume control in softphone mode you will be setting the volume of whichever audio device is configured in Settings ---> Softphone ---> Audio within your Phone Manager software.

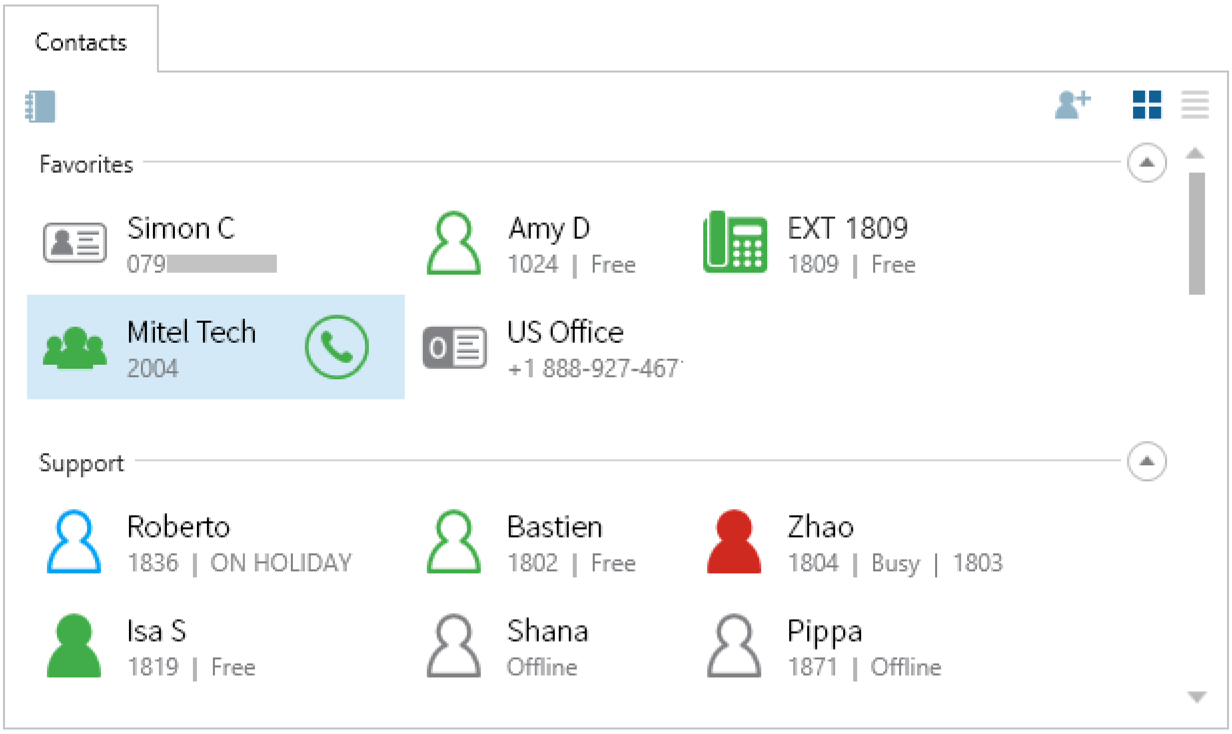
Volume control for a softphone is only available when using the built in softphone.

When muting a call on the softphone both parties audio are muted.

4.3 Contacts

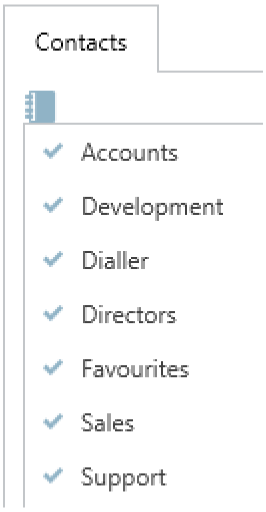
Overview

The contacts tab within Phone Manager provides a view to provide real-time information about other devices including Users, extensions, agents, speed dials and hunt groups. This gives a single quick view of the status of these devices and call control features such as single click to dial.



Groups

Each device that is shown is part of a group. Clicking the directory button on the top left hand corner displays the available directories and gives the User the ability to be able show or hide each group.



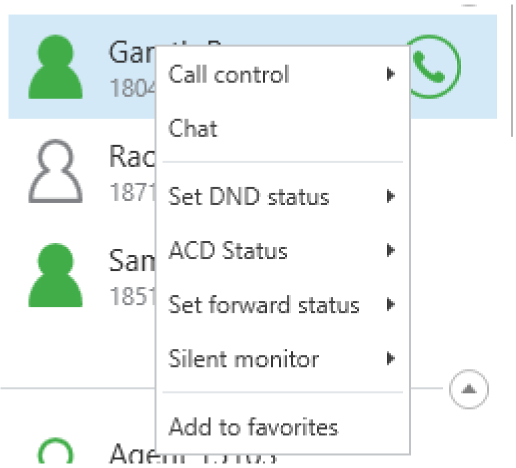
If there is a tick next to the entry then this will be shown. Un-checking this will cause the directory to be hidden.

Each Phone Manager User has their own Favourites group which they can add and remove devices to and from and is personal to each User. They can also add items from the Directories to this, for example Speed Dials, Personal Contacts, Central Contacts or Microsoft Outlook Contacts.

The other groups are created automatically from the Business Unit structure configured on the server.

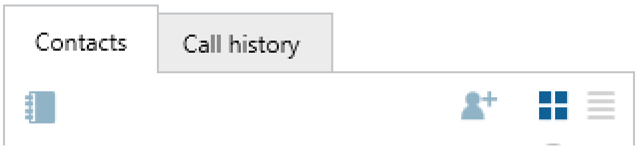
Device Control

For each device there are actions that can be performed. Right clicking on a device will display a menu of the available actions and the options available are dependent on the type of device, the state of the device and the license level of the client.



Device View(s)

The contacts tab supports displaying the device information in either a large icon or a details view. The current view can be changed using the view selection buttons in the top right corner.



The current view is highlighted in blue, with the large icon view using the left button and the details view on the right.

- Large Icon View - Displays a grid of devices with large icons and up to *3 pieces of information about the contact
- Details View - Displays a table of devices with more detailed information about their state

* The default information shown is Number, Status & Caller ID. To change the information displayed in Large Icon View, switch to Details View and move the columns around so that the information required is in the first 3 columns after the Name column.

The following information can be added in the Details View:

Grouping	Information	Description
Call Details *(if no call is in progress these columns will be empty)*	Account Code***	The current Account Code that has been entered on the call will appear here. If more than one code has been entered it will show the last one
	Call Type	The type of call; Internal, Inbound or Outbound
	Caller ID***	The telephone number or speed dial name of the caller
	DDI***	If the call was Inbound then this field contains the DDI number the call came in on
	Display***	This column contains the Display information form the device
	DNIS***	If the call was Inbound then this field contains the DNIS for the call

	Duration*	The current duration of the call in progress at this device
	Hunt Group***	If the call was presented through a Hunt Group it will be displayed here
	Ring Time*	The ring time for the current call at this device
	Start Time*	The start time for the call at this device
	Talk Time*	The talk time for the call at this device
	Time On Hold*	The hold time for the call at this device
	Transferred From	Where the current call was transferred from
	Trunk	If the call is not Internal, this column will display the Trunk number being used
User Details	Calls Queuing	The number of calls currently queuing at the device
	Calls Ringing	The number of calls currently ringing at the device
	Current Device***	If the device is an Agent ID, this will show where they are logged in
	Current Hunt Groups***	A CSV list of ACD Hunt Groups the device is a member of
	Forward Status***	The current Forward State of the device
	Name	The name of the current device
	Number	The number of the current device
	Status	The state of the current device. If it is a User it will show their Presence supplemented in brackets with the state of their primary extension
	Time In Status*	The time passed since the device's last state change
	Voicemail Count**	The time passed since the device's last state change
Server Contact *(if there is a call at the device and the server has a contact match it will*	Contact	The name of the contact on the current call
	Contact Field 1 to 10	The other contact fields from the server numbering 1 to 10

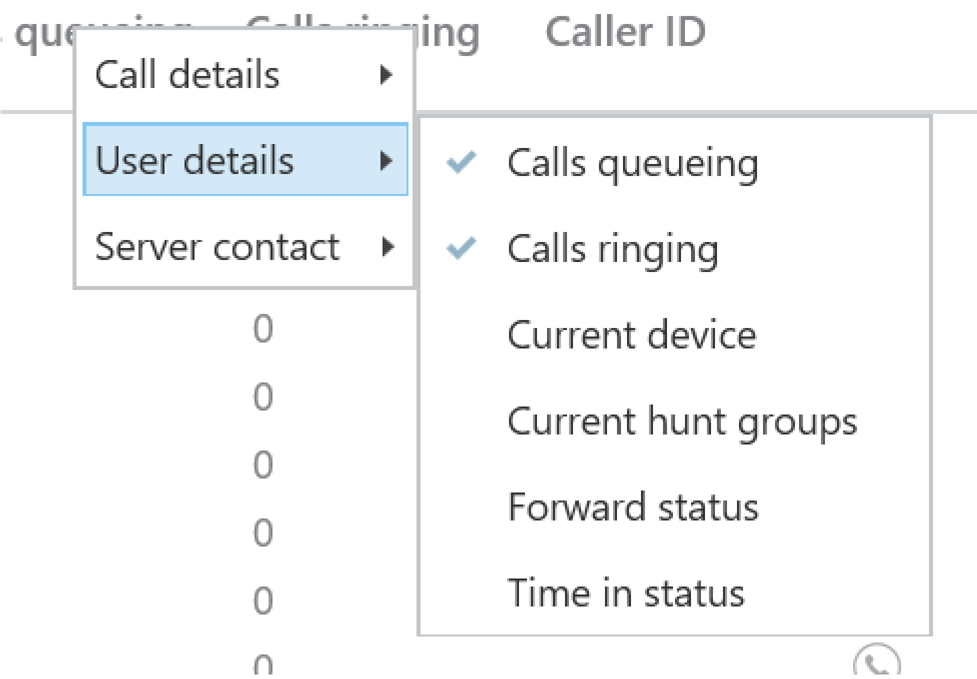
display in these columns)		

* Time based columns are only calculated from when Phone Manager starts. Time based columns by default update every 5 seconds however this is configurable on the server.

** Only available when using a Team Leader license

*** These columns are not available if using a Standard license

To add or remove columns from the Details View gird, right-click anywhere on the column headers and a menu will appear. Select or unselect items in the menu to hide or show them. Columns that are already visible will appear with a tick against them in the menu:



Columns can be re-ordered as required by left-clicking on the column header and dragging it to the required location.

Device Icons

Each type of device has a different icon and changes colour depending on the status of the device.

	Speed dial contact from the telephone system.
	Central server or personal contact, i.e. Global Directory.
	Microsoft Outlook contact.
	Microsoft Outlook 365 contact.
	A user that has set a personal profile image. In this scenario the small circle in the bottom right-hand corner shows the user's status. The status colours match those of the user icons below.
	User who is not connected with Phone Manager and has no extension/agent assigned to their User account.
	User in the free state without Phone Manager connected (this shows the status of the extension/agent assigned to their User account).

	User in the busy state without Phone Manager connected (this shows the status of the extension/agent assigned to their User account).
	User in the DND state without Phone Manager connected (this shows the status of the extension/agent assigned to their User account).
	User in the free state who has Phone Manager connected.
	User in the busy state who has Phone Manager connected.
	User in the DND state who has Phone Manager connected.
	Extension in the offline state or shown in a search result list.
	Extension in the free state.
	Extension in the busy state.
	Extension in the DND state.
	Agent is logged out.
	Agent in the free state.
	Agent in the busy state.
	Agent in the DND state.
	Agent in the wrap-up state.
	Hunt group.

4.3.1 Directories

Overview

Contact directories can be created to provide more information about the contacts who are calling in and to provide directory search features to help find people to call. The directories can be populated manually by users, bulk imported from files or linked directly to other databases.

There are several different sources that can be used to import contact records. They include:

- Manually created by users.
- Imported from text or CSV files.
- Linked direct into existing databases.
- Your own Microsoft Outlook personal contacts.
- The MiVoice Office 250 PBX System Speed Dial list (Maximum 1000).

Using the contact directories, Phone Manager can search to find any matching contacts to dial. When an inbound call is received or an outbound call made, the relevant directories are searched automatically and the matching contact information is made available and displayed on the Phone Manager toaster.

Global directories

The system has a global directory that is accessible by all users by default. This is stored centrally to enable the users to access this from any location that they connect from. Any user can add, edit or remove contacts.

Personal directories

Each user also has their own personal directory that is only accessible by them. The associated user then has the ability to be able to manage this directory and add, edit or remove items from this. This is stored centrally to enable the user to access this from any location that they connect from.

> If the user has upgraded from a Phone Manager v3 then their existing personal contacts can be imported. This is only supported if the users personal contacts have been stored locally (either in the %PROGRAMFILES% folder on the computer they are on, or in their "My Document" folder and NOT centrally. If they are stored centrally then they will need to be migrated before upgrading. If these files are present then Phone Manager will prompt the user automatically when started to import.

Database linked directories

External database can be linked to; using an ODBC or OLE DB connection. The contacts within this database are then imported into the system on a regular basis to keep them up to date. These directories are read only as any modifications to a contact would be lost on the next import.

CSV directories

Text files in CSV format can be used to import contacts. The contacts can be imported into the system manually or on a pre configured schedule so that the directories are always up to date. These directories are read only as any modifications to a contact would be lost on the next import.

> For more information see the Contact Directories section in the Communication Service help.

Microsoft Outlook personal contacts

If a User has the *Download Outlook contacts* option enabled in their *Client Profile* on the server, then personal contacts from within Microsoft Outlook can be searched directly from Phone Manager.

> The User needs to be connected with a Microsoft Outlook license to enable this feature.

> This requires Microsoft Outlook to be running within the same session as the Phone Manager client and only local contact folders are supported.

The contacts can be searched using the Home, Telephone or Mobile/Cell number fields as well as the first, middle, last and company name fields associated with the Outlook contact. The only user that can search and access these contacts is the local User. Other Users cannot access these contacts.

MiVoice Office 250 PBX System Speed Dial List

The PBX contains its own directory in the form of system speed dials. These entries are configured from within Database Programming on the MiVoice Office 250 system and the Phone Manager server will download them directly from the PBX when connected. Each entry only has a name and number associated with it and each of these fields can be used to search. Any changes to this list made on the MiVoice Office 250 system will automatically update the Phone Manager directory.

All Phone Manager users have access to search and dial the MiVoice Office 250 system speed dials.

> Private speed dials can NOT be dialled.

4.3.2 Searching

Overview

Searching for contacts is done from the main window in the *Search or Dial* section. Typing in a relevant search term, i.e. telephone number or name, will shortcut to any matching entries in the contacts tab.

The search will try and find a match in any of the devices on the PBX or within any of the directories that have been assigned to your Phone Manager user account on the server.

To cancel a search click onto the X next to the *Dial* button and this will restore the contacts tab back to the default view.

> Remember to cancel a search so that your entire contacts are visible on the contacts tab.

4.4 Call History

Overview

The call history provides a list of all of your recent call activity. This includes internal calls, external inbound and outbound calls and missed calls that were not answered. If the User has multiple devices (extensions/agents) associated with their profile then the history will show calls for all these whilst the User was linked with them (In other words the call history represents the Phone Manager user rather than the device on which the call took place).

The history is refreshed after a call is cleared from the current extension phone.

> The call history does not require Phone Manager to be running to save the call information - the server logs the call history centrally.

> You are only able to see the last 3 months of call history on the client.

For each call the history tab shows the following information:

- **Name** : This is either the name of the contact that has been matched to the call or if none is available then the outside number.
- **Time**: The time of day that the call was made or received.
- **Talk Time**: The length of time that the call was connected.
- **Ring Time**: The length of time that the call was ringing.
- **CLI**: The caller id (Calling Party Number) or outside number. This is only populated for external calls.
- **DDI:** The direct number dialled by the inbound caller. This is only populated for inbound external calls.
- **Hunt Group**: The hunt group that the call came in on. This is only populated for inbound external calls.
- **Account Code**: This shows any account codes that were set against the call whilst in progress.

> As the main window is resized the number of columns shown will change as there is more space to display these.

To the left hand side of each entry the icon shows what type of call this is.

	Outbound call
	Inbound call (This includes calls answered by voicemail and in the case of DEE calls answered by other devices in the DEE group)
	Inbound missed call

Next to each entry, on the right hand side, there are icons to dial the contact back and if the system has call recording integration enabled and the User has playback rights, then they can listen to the associated call recording for the call.

4.4.1 Call Recording

Overview

Phone Manager can integrate into a Call Recorder to provide direct access to playback the recordings for the User. Call recording can also be paused/resumed to enable specific parts of a call to not be recorded, for example when credit card details are being provided.

> Additional 3rd party licensing may be required to pause/resume call recordings.

Playback

Call recordings can be played back from the Call History tab within Phone Manager by clicking onto the icon next to the specific call.

This provides a direct link to the playback page for this call. To access the recording the User must have a valid account on the call recorder that grants them access to the call they are trying to listen to.

Pause / Resume

Call recordings can be manually paused and resumed by configuring a Toolbar button. This can be on the main window integrated toolbar or on an external toolbar. When used on an external toolbar the button highlight in the bottom right hand corner of the button will change colour based on the current state of the call recording.

Button	State
Pause / Resume	Grey highlight shows there is no call currently being recorded.
Pause / Resume	Yellow highlight shows the call is being recorded.
Pause / Resume	Red highlight shows the call recording is paused.

Call Tagging

Call recordings often have several custom fields that can be populated and Phone Manager provides a way to do this from a toolbar button or from a macro. They can be configured so that a specific tag field and value is used each time, or it can prompt the user to enter a custom value each time.

4.5 Presence Profiles

Presence Profiles provide mechanism for controlling many aspects of a user's extension. If enabled to use Presence Profiles, each user is given a default set of profiles that they can add to, edit or delete as they require.

Profile information

Each profile has a name which will be visible to other users of Phone Manager when it is selected. The profile name can then be supplemented with Additional Information that can be changed as required and will also be visible to other users.

For example, the profile 'In a meeting' could be supplemented with 'until 4pm' to provide other users with more information about status.

> If the profile selected is configured to enable DND then the Additional Information will be added to the DND status text on the telephone system.

Extension Control

Each Presence Profile can control the following aspects of the user's primary extension:

- Do Not Disturb
- UCD Hunt Group Status
- Forwarding
- Dynamic Extension Express

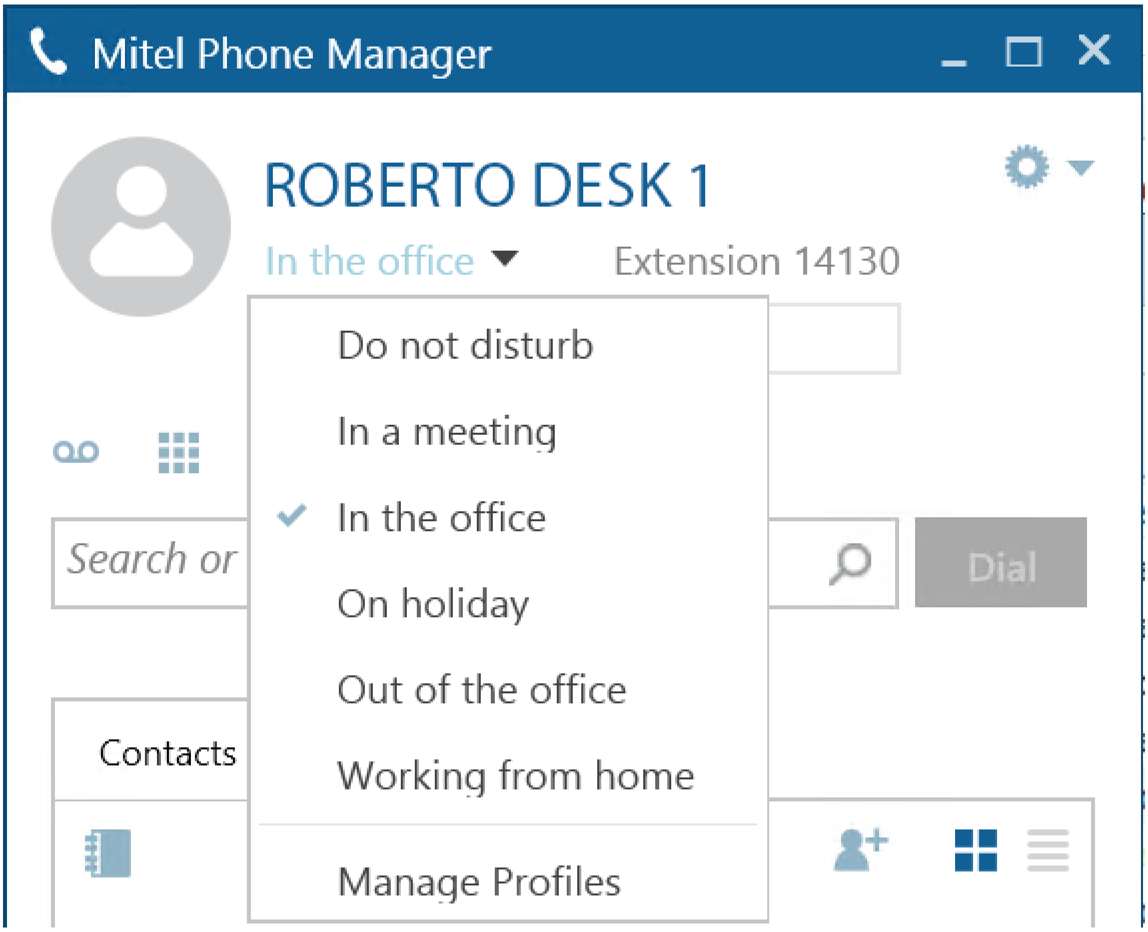
When a profile is changed, any extension status changes are applied to the user's primary extension and any extension they have Phone Manager connected to (apart from the DEE control which is only applied to the primary extension).

For more information on Presence Profiles, read the section on Editing Presence Profiles.

> Presence profiles can only control whether each of your devices is active or not (will ring or not). Configuration for what order they ring in must be made on the phone system.

Using Presence Profiles

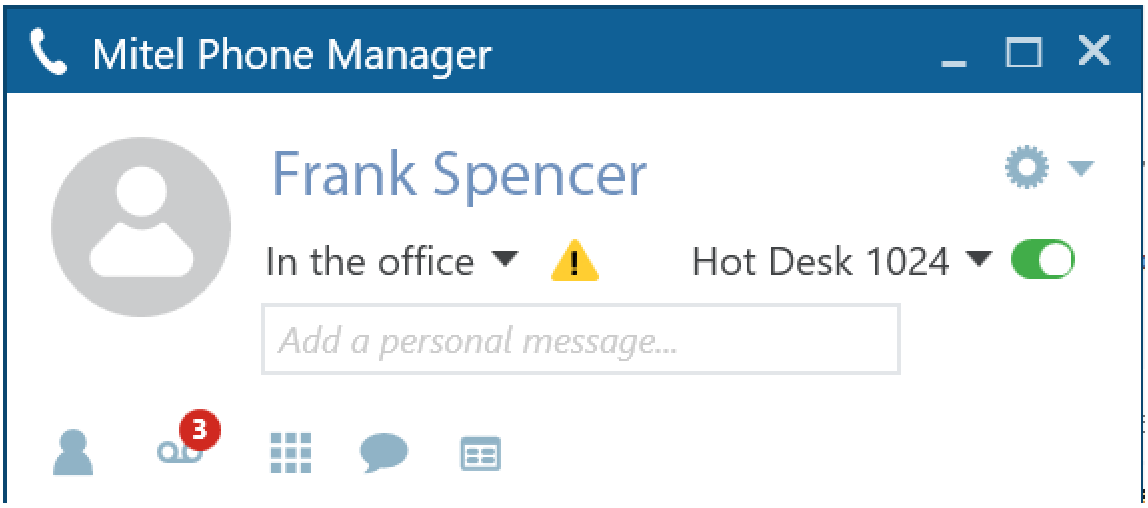
The currently in use profile is visible under the username at the top of the main Phone Manager window. To change the profile in use, use the drop down menu to the right of the current profile and select the new profile to apply. The currently selected profile will have a tick next to it.



Selecting 'Manage Profiles; is a shortcut to edit the Presence Profiles in Settings.

Configuration Warnings

In some scenarios a warning may appear to warn of a possible configuration issues.



When the warning triangle appears it will be for one of the following scenarios:

Your device status does not match your current Presence Profile configuration

When this message displays, it means the status of the user's Primary Extension is not as configured on the currently selected Presence Profile. This could be because a manual change has occurred on the extension such as it has manually been placed in DND. To fix the configuration left-click on the warning triangle and accept the prompt that appears.

Your extension will not ring with the currently selected profile

When this message displays it means that the extension that Phone Manager is currently connected to is not configured to ring in the currently selected Presence Profile. If the extension is required to ring then edit the current profile or select another one where it is configured to ring.

4.6 Chat

Overview

Chat is an instant messaging style feature that allows Phone Manager Users to exchange short messages with each other. When a chat session is started a new conversation is created that groups the messages sent together. If a User is offline when a chat message is sent they will be notified of new messages when they next come online.

Pay attention to the icon for a user you wish to commence a chat session with. The colours give you a hint as to the status of their phone and the type of icon indicates whether the user is likely to see your chat message straight away or later on.

 This hollow Green icon means the extension for this user is free but their Phone Manager software is not running so they won't see your message until the next time they run Phone Manager.

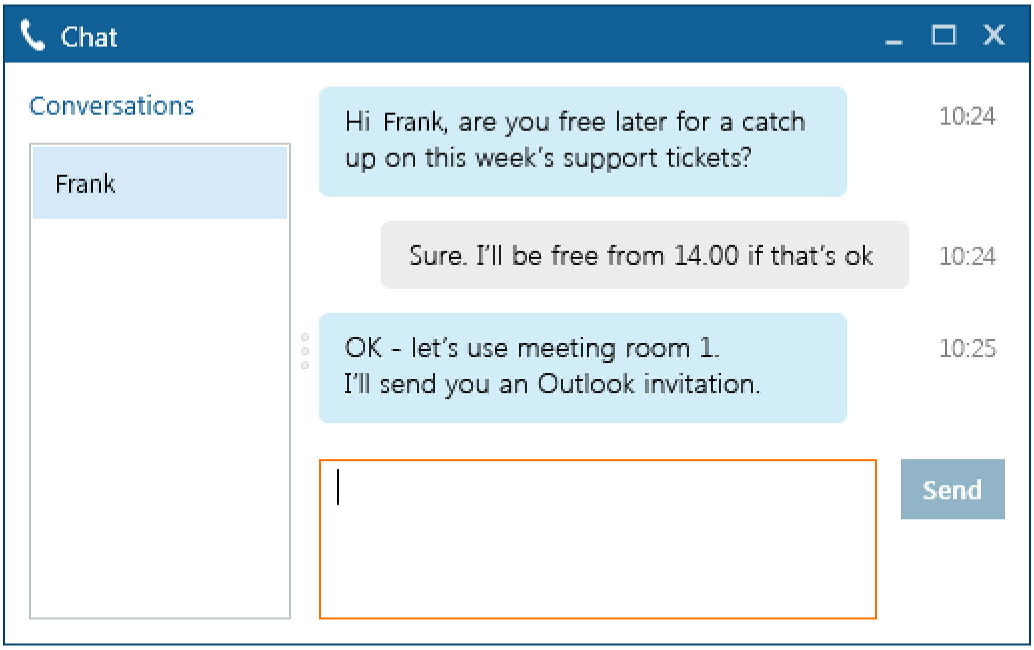
 or  This solid Green icon means the extension for this user is free **and** their Phone Manager is running so they should see your chat message straight away.

 or  This solid Red icon means this user is busy on a call but they should see your chat message straight away.

To initiate a chat session right click on the user's icon and select chat from the menu.

> The maximum length per chat message is 2500 characters.

This is what your chat session would look like.

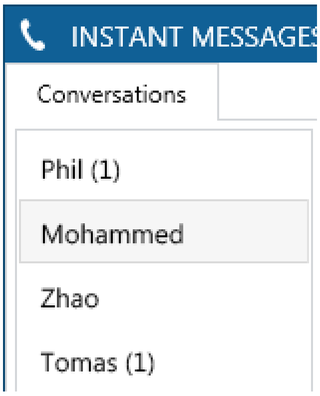


Message Notifications

When a new message is received then the icon on the start menu will turn orange.

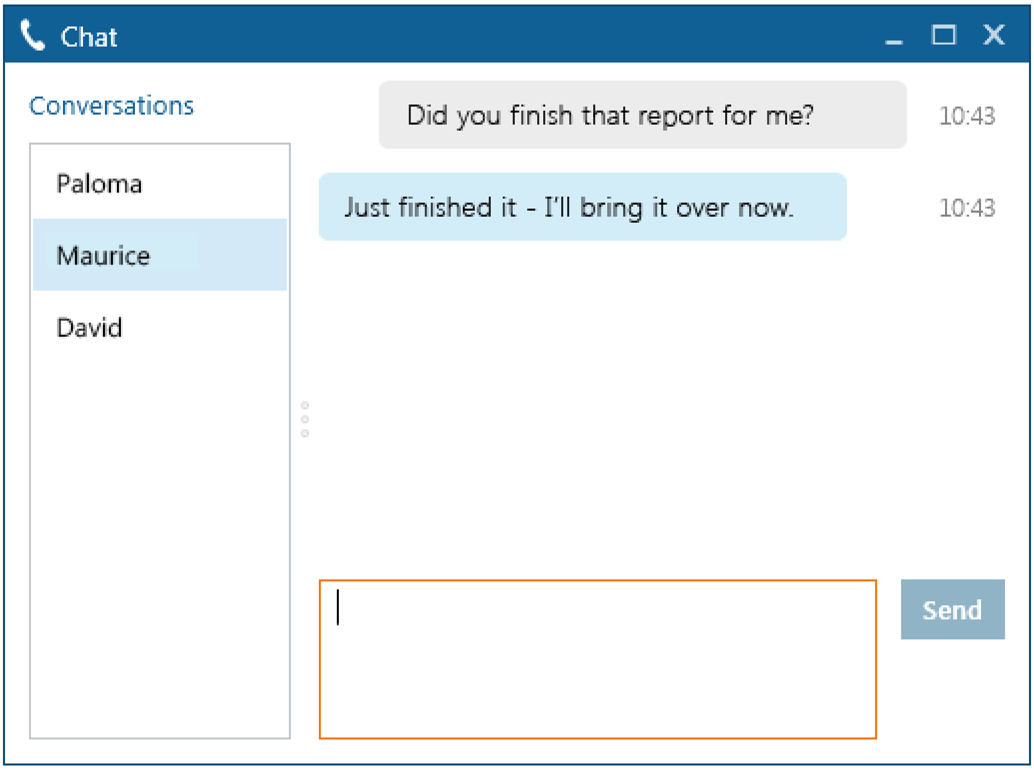
Clicking on the icon will display the new message. Messages you send are shown on the left and messages received are shown on the right. The time of the message is tagged to the right of the message.

Next to each conversation if there are new unread messages then the number of them will be shown against Users conversation.



Multiple Chat Sessions

Multiple chat sessions are grouped by the User who the message is sent to or received from. Each User has the list of conversations shown on the left hand side and clicking on the name will change the right hand window to show the history.



Hiding Chat Sessions

Chat sessions can be hidden to remove completed conversations from the UI. To hide a session right click on the user on the left hand navigation menu and select 'Hide Conversation'.

> If a user is using Phone Manager Mobile then they will always appear 'Online' for Chat.

4.7 Hot Keys

Overview

Hot Keys enable Users to set a combination of keystrokes to access commonly used features within Phone Manager. The configuration of the hot keys is specific to each User. The following list of hot key actions are supported:

Action	Description
Answer call	Answers the call currently ringing. If there are any calls in progress then this is ignored.
Clear call	Clears the call that is connected to the extension.
Directory search	Brings the main window to the front and sets the focus and cursor to the *Search or Dial* field.
Do not disturb	Toggles the DND state at the extension. If no message is pre configured then it will prompt for the message to use.
Highlight and dial	Dials the number that is currently highlighted in other applications.
Hold or retrieve	If a call is on hold then retrieves the call otherwise puts it on hold.
Launch call history	Brings the main window to the front and sets the call history tab in focus.
Launch dial pad	Shows the dial pad window.
Mute	Mutes the audio for the current call. If this is a softphone then both sides of the call are muted otherwise only the audio from the Users extension is muted. See Softphone Limitations.
Redial	Redials the last number using the Mitel feature (default code 380). Not supported on softphone (use call history instead), see Softphone Limitations.
Restore Phone Manager	Brings the main window to the front.
Volume up	Increases the volume level. See the Volume Control section for details.
Volume down	Decrease the volume level. See the Volume Control section for details.

Configuration

To configure the hot keys:

1. Open the *Settings* window.
2. Select the *Hot Keys* tab.
3. Double click on the hot key entry to configure.
4. Each hot key needs to be enabled, check the **Enabled** option to do this.
5. Select the **Key** to use for the hot key.
6. Check the **Alt**, **Ctrl**, **Shift** and/or **Win** checkbox's that will be used in combination to the **Key** selected.
7. Click on **Apply** to save the changes/

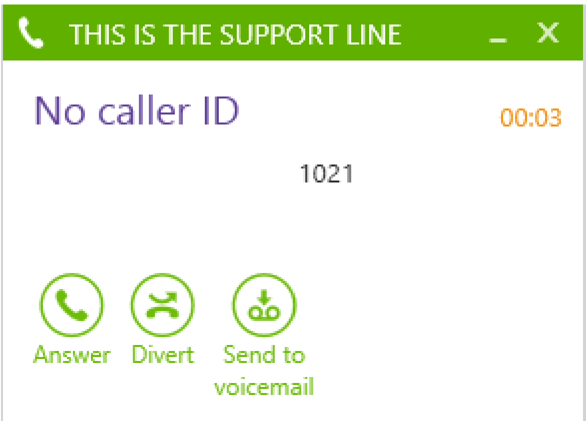
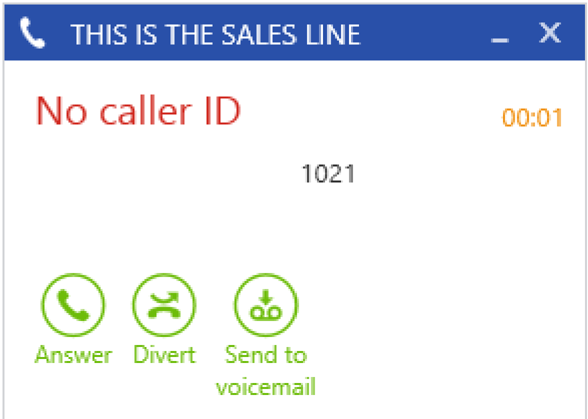
⚠ Always configure the hotkeys to use at least 3 combinations, for example Alt + Ctrl + D. Using simpler combinations may result in conflicts with other application that are running at the same time.

4.8 Call Banner Profiles

Overview

Banner profiles control how the Phone Manager toaster popup is displayed when calls are received at the client. The information that is displayed, the colour and text of the title bar can be changed depending on a specific set of conditions being met for the call.

For example, using a condition on the DDI number, support line calls could be shown with a green banner whilst sales calls with a blue banner.

Support line calls shown with a green banner.	Sales line calls could be shown with a blue banner.
	

Several different profiles can be created and they can be given a priority so that if two banners have a similar condition then the one with the highest priority will be used.

This feature can be used to identify VIP callers in order to improve customer service.

See the Call Banner Profile section on the Communication Service server for details on how to configure these.

4.9 Integrated Toolbar

Overview

The integrated toolbar provides five buttons on the main window shown underneath the *Search or Dial* field. Each button can be customised by the User to set the label shown and what action is performed when the button is clicked.

> This is only available when running with a Professional or higher license or when using the built in softphone.

Customising Buttons

To edit the button:

1. Right click the button and select *Edit.*
2. Select the *Action* to perform from the Action drop down list. See the Button Actions section for details.
3. Enter the name that will be shown on the button in the *Name* field.
4. Configure any *Parameters* if required by the *Action* selected.

5 Professional Features

The following section covers the features that are available in the Professional licensed version of Phone Manager.

ACD Agent Control	Ability for the User to control their ACD status.
Integrated Toolbar	This provides 5 buttons that can be customised on the main window.
Toolbars	This give access to the full toolbars.
Application Support	Integration into 3rd party application using API Access, Macros, TAPI, Command Line or Application Support Plugins.
Campaign Manager	This gives access to the Campaign Manager form.

5.1 Application Support

Phone Manager can integrate into 3rd party applications in several ways depending on the requirements and features that are supported by the application. This can be as simple as Highlight & Dial or more complex full call control and events using API Access or Macro design.

The following is the list of integration options available.

Method	Description
Directories	Contact directory imports, to display information about the caller on the toaster.
Highlight & Dial	Dialling from other applications by selecting the number and then activating the dial by using Hot Keys or double clicking on the highlight and dial icon.
Command Line	Command line arguments can be passed to the client executable to perform actions.
Macros	VBScript macros that can be activated on call events or manually by the User.
TAPI	1st Party TAPI driver for integration into 3rd party applications.
Application Support Plugins	Plugins provide specific integration to a range of well known CRM style applications.

If the application or version is not currently supported then complete the integration request process and we can investigate the possibility of supporting this application.

5.1.1 API Access

Overview

The client provides API components that can be used to embed some of the functionality of the Phone Manager client into a 3rd party application. Unlike the other Application Support options the client does not have to be running to do this.

All of the call controls events and methods are available, so applications can react to call ringing events and receive the call details and then perform their own handling of what to do next, i.e. screen popping, dialling out etc.

> This does require development work to be performed by the application vendor or administrator.

> When using the API the Phone Manager client can be running at the same time and this will only consume a single license as long as the Phone Manager client and the application are running in the same user session.

> See the Phone Manager API reference for more information.

5.1.2 Macros

Overview

Phone Manager Professional license supports a scripting interface to allow VBScript macros to be developed. They can then be configured to trigger on a manual User action, i.e. a toolbar button action, or automatically on pre-defined call events. The scripting interface provides access to the call information that can be used within the script and extra methods to control the extension and other features, i.e. call recording.

For example this VBScript example will display a message box when an incoming call is received and display the caller id:

```
MsgBox "Call from " & PhoneControl.CLI
```

> See the Phone Manager Macro API reference for more information.

Configuration

The macro design and configuration is available for Users who have the *Allow macro editing* option enabled on their *Client Profile* on the server. Without this option Users can only change the **Enable event-driven macros** option. This controls if the macros that have been assigned to the User will be triggered on the associated call events.

When creating new macros they are first designed and tested from within this section. When this is complete they can be published and this makes them available on the server. Once published they can then be assigned to the relevant Users. A copy is made of the local version of the macro and this then cannot be edited. Any updates would need to be made on the original local version and then re published. Users would then need to be reassigned to this new published version. This provides a level of security to prevent macros being deployed without permission.

The list of macros shown in the *Macro Configuration* section only shows the local macros not published to the server for this User. To see the list of published macros see the *Macros* section on the server user interface.

To create or edit a new macro:

1. Click on the *New* or *Edit* button.
2. Enter a **Name** that will be used on the server to identify this macro.
3. Enter a **Description** that can be used to detail what this macro is for.
4. Select the call event to automatically trigger the macro.
    - 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.
5. Enter the macro text in the **VB Script** section.
6. Use the **Test** button to validate the syntax. If there are any errors then a message box will be displayed indicating the error.
7. Click on **Save** to save this macro.

To publish a macro:

1. Select the macro from the list of macros available.
2. Click on **Publish**.
3. Enter a new name for the macro, it is recommend to include a version or revision number.
4. Click **Ok**
5. From the server user interface, assign this to the relevant Users.

To delete a published macro:

1. From the server open the Site -> Features -> Phone Manager -> Macros section
2. Select the macro and click on **Delete**.

5.1.3 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.

Configuration

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**.

5.1.4 TAPI

Overview

The TAPI Service Provider (TSP) provides a 1st Party TAPI support for client applications, 3rd Party TAPI is not supported. Multi user environments such as Terminal Service, Remote Desktop or Citrix configurations are not supported in this release.

The TSP service supports the TAPI v2 and TAPI v3 standards.

The TSP only supports call control over the first call at a single device and limited events (new & end) for additional calls will be provided to the client application.

The TSP cannot be tested against every application that "supports" TAPI due to the different ways that it can be implemented. Additionally the features available within the client application are dependent on what the 3rd party application has implemented. The TSP will not necessarily work with every application that has implemented TAPI and would need to be verified to ensure proper integration.

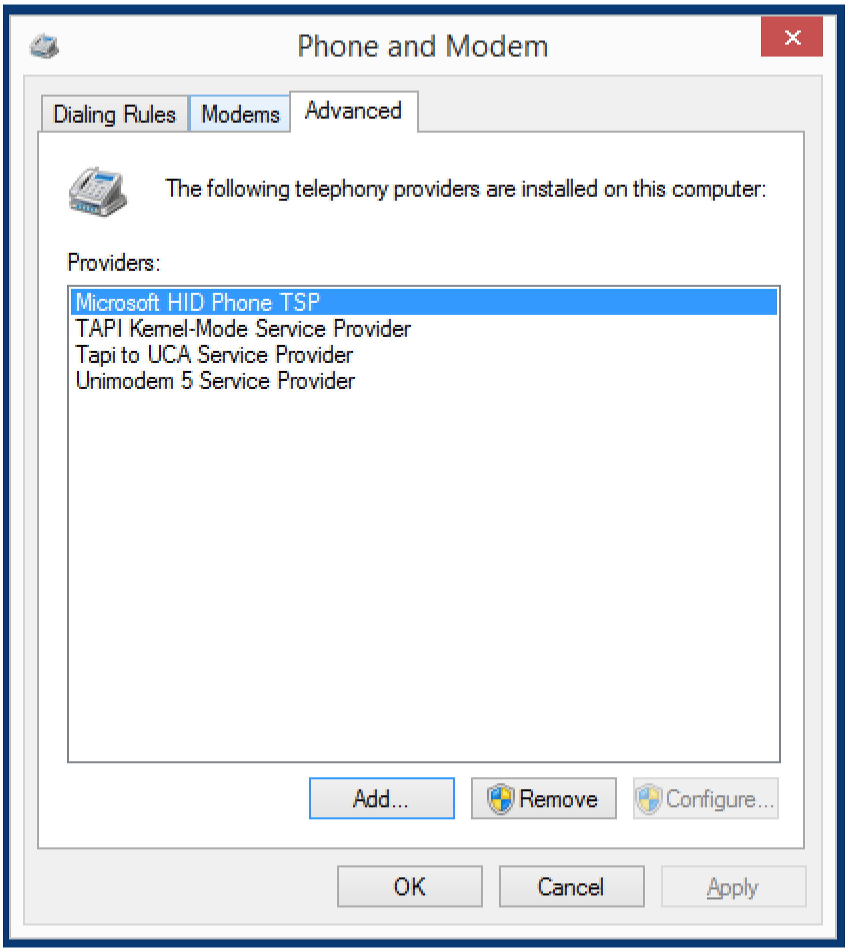
The TSP supports the following basic telephony functions as defined by Microsoft.

http://msdn.microsoft.com/en-us/library/windows/desktop/ms725522%28v=vs.85%29.aspx#tspi.call_states_and_events_qref

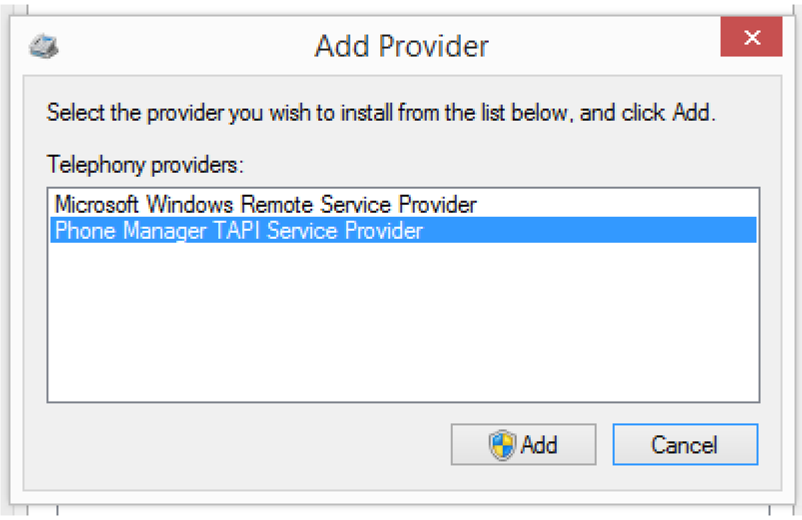
Configuration

When Phone Manager is installed to use the TAPI feature it needs to be configured in Windows. To do this follow this procedure:

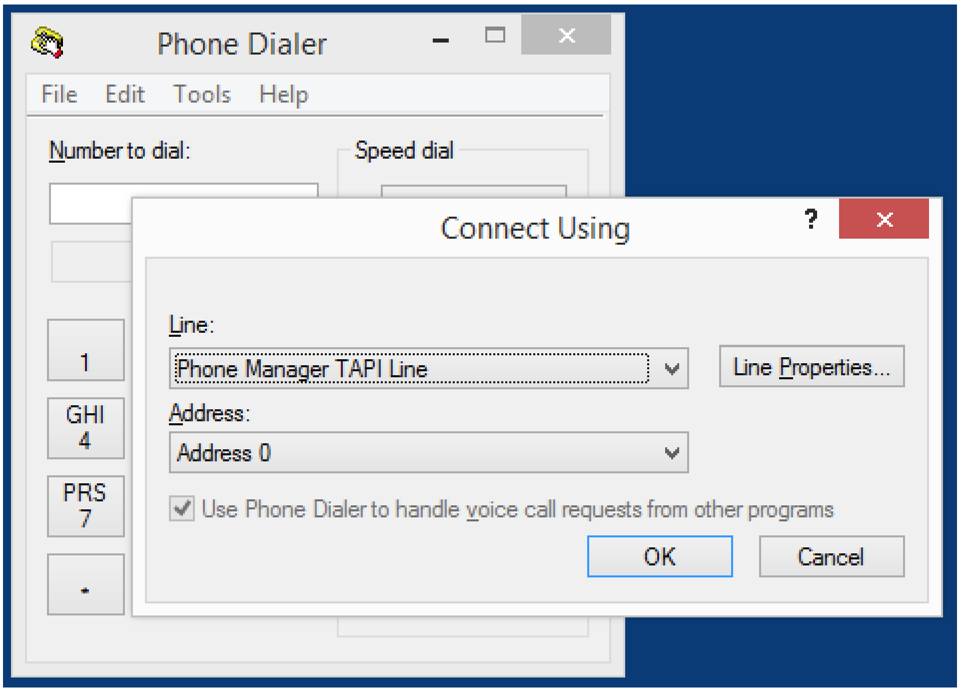
1. From Windows open the "Phone and Modem" control panel form.



2. Select the *Advanced* tab and click on the *Add* button.
3. From the list of providers, select the "Phone Manager TAPI Service Provider" option and click *Add*.



4. Click *Close*. The TAPI driver is now ready to use.
5. To test the TAPI driver using Windows Phone Dialler, select Start -> Run -> dialer
6. Select *Tools -> Connect Using*, select the "Phone Manager TAPI Line" and click *Ok.*



7. With Phone Manager running make a call from Phone Dialler.
8. If this is successful then the TAPI driver is functioning correctly.

5.1.5 Command Line

Overview

The client can be run via the command line to override the local configuration options on start up and to perform basic call control actions whilst the client is running.

For example *PhoneManager.Client.exe MC: 8889274671*, will cause the number 8889274671 to dialled.

Start up Options

If no client is running then the following arguments can be used to override the local configuration of the client when it starts up. For example to use a different extension number or a different user account.

To override the location:	/Override:"true" /Location:"Office"
To override the extension:	/Override:"true" /extension:"1001"
To override the server & user details:	/Override:"true" /Host:"appserver" /Username:"domain\user" /Password:"mypassword" /Override:"true" /Host:"appserver" /Username:"user1" /Password:"mypassword"

Running Options

If the client is running then the following arguments can be used to perform basic call control actions.

> The MC (Make Call) command is available with all license levels of Phone Manager. All other command require Professional or Team Leader Licenses.

Call & extension Control Arguments	
MC:number:{accountcode}	Makes a call to the given *number*, if an *accountcode* is provided then this used wher making the call. If the local extension is already on a call, it will be put on hold automatically and an announced transfer will be initiated. The TR: command can be used to complete the transfer.
ANS	Answers a ringing call at the extension.
CC	Clears the current active call at the extension.
HC	Hold the current active call at the extension.
RC	Retrieve the held call at the extension.
AC:accountcode	Set the *accountcode* against the current active call at the extension.
MD:"{text}"	Changes the top line display of the screen on the keyset to the *text* value, up to 16 characters. This requires an external trunk call to be in progress.
DND:"{messagetext}"	Sets DND on the extension using the given *messagetext*, if no messagetext is speci then the extension is removed from DND.
TOGGLEDND	Toggle DND at the extension, so if it is enabled then removes it and sets it if not ena
LN:agentId:{huntgroup}	Logs the ACD *agentid* into the given *huntgroup*. If no *huntgroup* is provided then all groups.
LF:agentId:{huntgroup}	Logs the ACD *agentid* out of the given *huntgroup*. If no *huntgroup* is provided then a

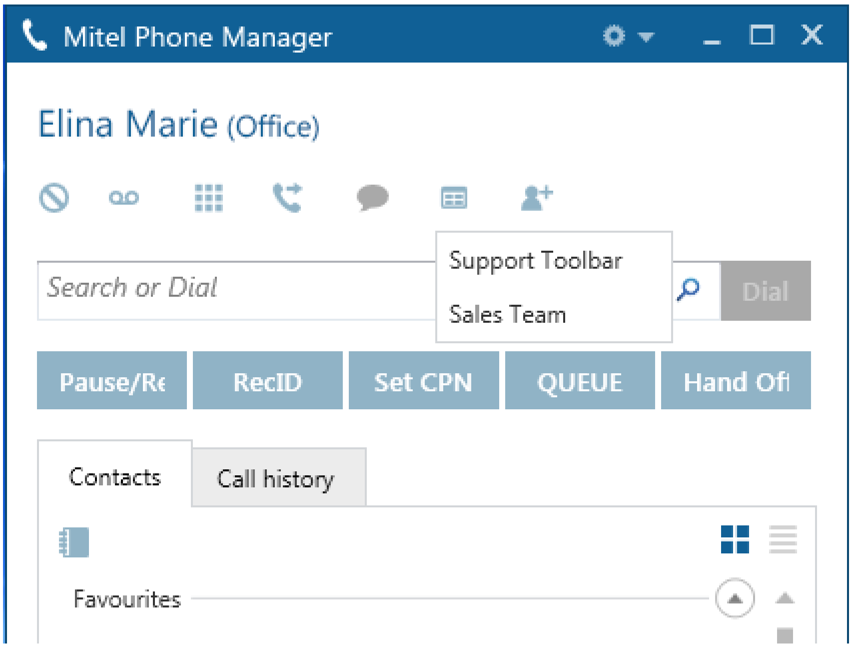
	hunt groups.
VD	Decreases the volume at the extension. See Volume Control section for details.
VI	Increase volume at the extension. See Volume Control section for details.
FI:destination	Sets an immediate forward to the *destination*.
FB:destination	Sets an forward on busy to the *destination*.
FN	Removes any forwarding.
FNA:destination	Sets a forward no answer to the *destination*.
FAB:destination	Sets a forward no answer busy to the *destination*.
TC:destination	Performs a direct transfer to the *destination*
TR:	Complete a transfer. (Must have a call in progress and a call on hold to use this command)
Call Recording Integration Arguments (require call recording integration to be enabled)	
TAG:field:text	Tags the call recording tag *field* with the *text* provided, overwriting any existing information in this tag field.
TAGAPPEND:field:text	Tags the call recording tag *field* with the *text* provided, appending this to any existing information in this field.
PR	Pauses the recording of the current active call at the extension.
RR	Resumes the recording of the current active call at the extension.

5.2 Toolbars

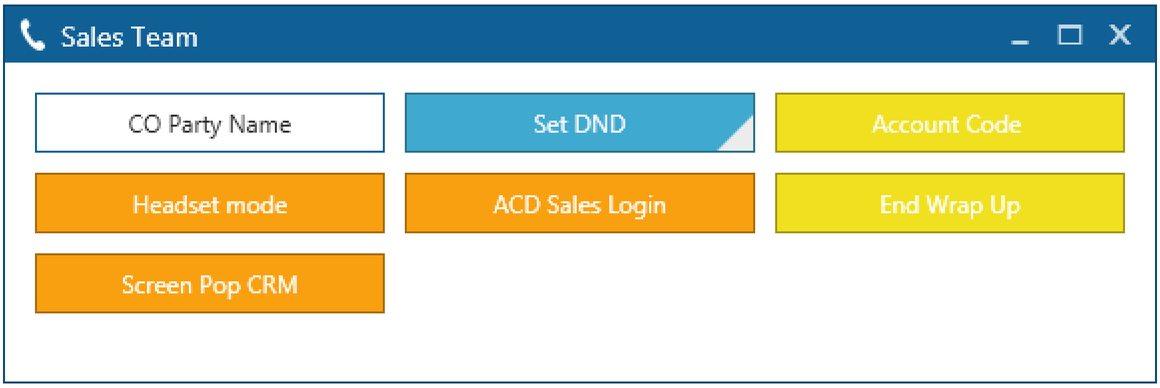
Overview

Toolbars allow the application to be configured so that commonly performed actions can be performed at the touch of a button. Specific functions can be programmed under a button such as answering a call, tagging a call recording, or a macro can be executed for more advanced tasks. Toolbars are configured on the server and assigned to specified Users.

When a toolbar is assigned they become available to the User to open in the *Toolbars* menu on the main window. (Phone Manager needs to be restarted to "read in" any new toolbar rights)



Multiple toolbars can be created with varying amounts of buttons that can have custom labels and be colours to highlight or categorise specific types of buttons. To open a toolbar select the entry from the toolbar drop down.



5.2.1 Integrated Toolbar

Overview

The integrated toolbar provides five buttons on the main window shown underneath the *Search or Dial* field. Each button can be customised by the User to set the label shown and what action is performed when the button is clicked.

> This is only available when running with a Professional or higher license or when using the built in softphone.

Customising Buttons

To edit the button:

1. Right click the button and select *Edit.*
2. Select the *Action* to perform from the Action drop down list. See the Button Actions section for details.
3. Enter the name that will be shown on the button in the *Name* field.
4. Configure any *Parameters* if required by the *Action* selected.

5.2.2 Button Actions

Overview

The buttons that can be used on a toolbar have different actions that can be performed when they are clicked. Depending on the action then additional parameters may need to be configured, or in some cases if they are not provided then the User will be prompted for these when they click the button.

Action	Parameters	Description
ACD end wrap	None	End the wrap state for this agent and place into the free state.
ACD status	Optional: *Huntgroup*	Logs the agent in to specified *ACD Huntgroup. If* not specified then logs into all ACD groups. If already logged in, then toggles the state and logs the Agent ID out of the specified *Huntgroup*, if not specified then logs out of all groups.
Answer call	None	Answers a ringing call at the extension.
Change caller ID	Optional: *Number*	This changes the outgoing Caller ID (CLI) (or Calling Party Number (CPN)) that is presented when outside calls are made from this extension. The feature needs to be enabled on the PBX and the number presented needs to be allowed by the network trunk line provider.
Clear call	None	Clears (or hangs up) the call that is connected to the extension.
Dial digits	Optional: *Digits*	Sends the specified *Digits* to the extension. If not specified then prompts the User for the digits.
Do not disturb (DND)	Optional: *Number* Optional: *Text*	If the extension is already in the DND state then DND is switched off. If not in DND then the extension is placed into DND using the message *Number* and the message *Text* if specified. If not specified then the User is prompted to enter text associated with the message.
Enable event driven macros	None	Enables or disables event driven macros.
Feature code	Optional: *Code* Optional: *Parameter*	This represents any feature code that is available on the MiVoice Office 250 PBX. The list of feature codes available is downloaded automatically from the MiVoice Office 250 PBX along with the description. This will set the feature *Code* specified or prompt the User to enter the feature code number. Some feature codes can accept additional *Parameters* and this can be configured but the User cannot enter additional parameters if not specified.
Headset mode	None	Enables or disables headset mode on the

		extension.
Hold call	None	Holds the call that is currently connected to the extension.
Make call	Optional: *Number*	Makes a call from the extension to the *Number*. If the *Number* is not specified then the User is prompted to enter a number.
Pause / resume call recording	None	This pauses or resumes the call recording for the active call on the extension. (Requires call recording integration to be enabled).
Play prompt	Optional: *CRA*	If the PBX has an IVR system connected then this will conference in the *IVR* device number configured into the current call.
Record current call	Optional: *Mailbox*	This initiates a Record-A-Call for this call and stores the recording in the MiVoice Office 250 *VoiceMailbox* provided. If no *Mailbox* is provided then the User is prompted to enter a valid mailbox number.
Redial	None	Performs a redial at the extension using the PBX redial feature code.
Retrieve call	None	Retrieves a held call at the extension.
Run executable	Required: *Path* Optional: *Arguments*	This enables any application installed on the PC to be run. The *Path* needs to be set to the full path and file name of the file to run and if there are any *Arguments* to pass then this can be configured.
Run macro	Required: *MacroID*	Runs the published macro with the *MacroID.*
Screen-pop application	Required: *AppID*	Runs the application support screen pop for the given *AppID*.
Send to voice mail	None	Sends the call ringing at the extension directly to voicemail.
Set account code	Optional: *Code*	Sets an account *Code* against the current call at the extension. If not specified then the User is prompted to enter a code.
Set account code on monitor	Optional: *Code*	When a supervisor is silent monitoring a call this will set an account *Code* against the call being monitored. If not specified then the User is prompted to enter a code.
Tag call	Optional: *Text*	Changes the top line display of the screen on an extension to the *Text* value, up to 16 characters. The text entered will then follow the call when transferred.
Tag recording	Required: *Field* Optional: *Tag*	Tags the call recording tag *Field* with the *Tag* provided, overwriting any existing information in this tag field. (Requires call recording integration

		to be enabled).
Transfer call	Optional: *Destination*	Performs a direct (blind) transfer to the *Destination*. If the *Destination* is not provided then the User is prompted to enter a destination.
Volume down	None	Decreases the volume at the extension. See Volume Control section for details.
Volume up	None	Increases the volume at the extension. See Volume Control section for details.

5.3 Campaign Manager

Overview

Phone Manager is the main user interface (UI) for users making outbound calls from Campaign Manager. Phone Manager provides a dedicated Campaign Manager form that provides all functions and information necessary.

The user must be configured with a *Professional* or *Team Leader* license to use this feature.

To access the form click on the icon shown on the main Phone Manager window toolbar.

If this is not displayed then check that the user has the *Campaign Manager* client profile option enabled on their account.

When making outbound calls there is often a need to interact with a third party piece of software. This may be because there is additional information that the user needs to see when on the call or because the user needs to update data or a process outside Campaign Manager.

To cater for these different requirements, Phone Manager can display the Campaign Manager form in one of three views:

1. **Minimized view**: Used when screen popping / using third party applications. The Campaign Manager UI becomes more of a toolbar leaving space on the screen for other applications. When using this mode the normal Phone Manager plugins/macros can be used to screen pop third party applications.
2. **Contact details view**: Used when no third party applications are required. The Campaign Manager UI takes up the whole screen and provides the user with easy access to all the features of the form.
3. **Embedded webpage view**: Used when the third party application's interface is a web page. The Campaign Manager has an embedded browser that will load the web interface.

The embedded webpage uses a Chrome browser engine. If there are problems with rendering on screen popping then the minimized view can always be used alongside a full browser window.

End User Features

The Campaign Manager form within Phone Manager is split into four main sections. Depending on the view chosen the sections will appear differently to the end user.

User Productivity

The user productivity section displays to the user their daily productivity on the system. The statistics displayed outline the number of calls they have made and how successful they have been at getting through to the right person and then converting the lead into a sale.

The statistics shown are for all campaigns the user has been working on that day. The statistics will update once the call has finished wrap up.

Depending on how busy the database is there may be a delay in the statistics updating on the users screen.

Contact Details

The contact details page gives the user as much information as possible about the person they are calling.

At the top of the section it displays the contact's name and the result of the last call that was made to them. The contact's details are then presented in three ways:

- Imported Fields, fields 1 to 10 from the imported data are shown to the user here. If there is key information about the contact that the user needs to know they can read it from this section as the call is in progress.
- Call history, a complete history of all calls to the contact are listed here. This gives the user an idea of how often the contact has been called and allows them to have knowledge about previous calls if the contact mentions it.
- Notes, the notes section provides an optional way of adding information to a contact record during a call. The

information will then be available to anyone calling that contact record in the future.

For more information on the Phone Manager UI in relation to the dialling process please reference the Campaign Manager help.

6 Team Leader Features

The following section covers the features that are available in the Team Leader licensed version of Phone Manager.

Alarm Notifications	Provides notifications to the User when any alarms are triggered on the system.
Hunt Group Status	Provides visibility of the status of a hunt group icon.
User Control	Ability to set the status of other devices, including ACD, DND and Forward state.
Silent Monitoring	Lets the Users control silent monitoring of Users. This requires specific programming on the PBX.
Voicemail Messages	Enable the User to see the number of Voicemail messages for a device.
Global Directory Management	Enable the User to add/edit items in a global directory.

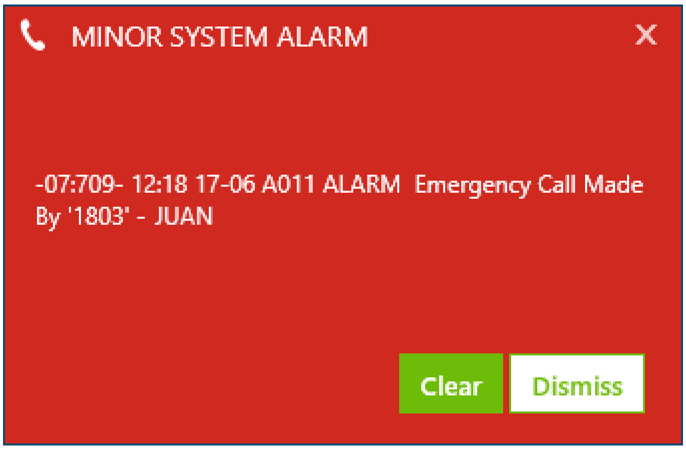
6.1 Alarm Notifications

Overview

Alarms generated on the PBX can be sent to Team Leader clients to notify them that they have occurred. Specified alarms that will be sent to the Team Leader Users is configured in the Alarms section on the server.

When an alarm is raised the client will display an alert window and the User can dismiss the alarm. The User may also be able to clear the alarm from the PBX if the extension they are associated with is programmed as an *Administrator*.

As an alternative to a pop up alarm form, the system can also send alarms by email.



6.2 Hunt Group Status

Overview

Team leader license Users can be provided with information about hunt groups. This gives the User details on the number of calls queuing and ringing at any hunt groups that they have in their contact list.

6.3 User Control

Overview

Team leader provides the User with the ability to control another Users extension and can perform silent monitor actions (requires MiVoice Office 250 programming to enable silent monitor permissions for the extension associated with the Phone Manager session). The control actions that are available are:

- DND control
  - Enabling and disabling DND
- ACD control
  - Logging agents out of ACD hunt groups
  - Logging agents into ACD hunt groups
- Forward state control
  - Setting forwarding
  - Removing forwarding
- Silent monitor (this is dependent on the PBX programming)
  - Start a silent monitor
  - Start a continuous silent monitor

To control another extension, from the Contacts window right click onto the device and this will display a menu where the action can be selected. Depending on the type of device and its current state the list of available actions may change.

7 Settings

Overview

The settings section on the client provides the User with the ability to be able to configure how the clients connects and interacts with the system. This includes the following options.

Connection	Configuration and connection settings for how the client will connect to the server from both local and remote locations and how their extension number is assigned.
User Preferences	Configuration options for a user's personal settings.
Presence Profiles	Add/Edit/Remove Presence Profiles. Note: only visible if a user has been configured to use Presence Profiles on the server.
Softphone	Options to configure the audio sources, codecs and quality of speech when Phone Manager is running in softphone mode.
Hot Keys	The hot key configuration and assignment.
Macros	Enabling event-driven macros and access the macro designer.
Application Support Plugins	Configuration of the plugins for CRM integration.
Diagnostics	Options for enabling diagnostics and troubleshooting.

7.1 Connection

Overview

The connection settings enables the User to configure how the client will connect back to the server. The options shown here will have been pre configured during the installation process, see the Configuration section for more details, when the client was first installed and connected.

General

The general section configures how this computer will be used and the default options to connect.

If the PC that the client is installed on remains in the same physical location and uses the same connection details all of the time then check the **Is the location of this PC static?** option. This configures the client to always use the connection settings from the **Default Location**.

If the PC does move, for example this is a laptop, then uncheck the **Is the location of this PC static?** option. This will configure the client to always prompt for the location details to connect with each time that it starts. This is also an appropriate setting for use with a Terminal Server (TS) or Citrix Server.

7.1.1 Local Connection

Overview

The local connections settings configures how the client will connect when they use the local / office location to connect.

Server Connection

The **Available hosts** window shows a list of all the servers that the client has found by broadcasting on the local network. If the server is not on the same local subnet as the client then it may not be displayed. Selecting an entry from the **Available hosts** will populate the **Host address** entry or if the server is not shown then it can be entered manually.

The client will try and connect using the credentials of the User who is logged into the PC. If this is not correct then check the **Override login details** and enter the **Username** and **Password** details to use.

> If overriding a Windows account then enter the **Username** in the format DOMAIN\User.

> When using Windows authentication and not using **Override login details** if there is another connection to the Communication Service server with alternate details then the connection may fail or connect with an incorrect account. For example if the User has a mapped network drive connected using alternate credentials then Windows will store these details in the "Windows Credential Manager". These stored details will be used by Phone Manager to connect with. To prevent this from happening do not connect to the same server as Phone Manager with alternative credentials.

> Connections through web proxies are not supported and the Communication Service server should be added to any relevant exclusion list. Failure to do so may result in clients not being able to connect.

Extension Details

The Extension details section controls what extension will be assigned to this client when it connects. There are 3 options available:

Always use the extension assigned to my user account

This will use the extension that has been configured against the User in the server. If this is selected but the User does not have an extension assigned then they will be prompted when they connect. The extension will then be permanently associated with the User. Any calls that are made on this extension even when the client is not running will be associated with this User. This means that they will be shown in the call history when the User next opens the client.

Everyone who uses this computer shares the same extension number

This will force each User who runs the client on this PC to use the extension number configured in the **Extension** field. The extension will only be temporarily assigned to the User whilst the client is connected. This means that any calls made on this extension when the client is not open will not show up on the Users call history. Calls made on the extension will be assigned to the User who's client is currently running.

This should be used when there are different Users using the same computer and extension at different times.

Everyone who uses this computer uses a different extension number (i.e. TS/Citrix/PBX hot desking)

This will prompt the User each time that the client starts for the extension number to use. The extension will only be temporarily assigned to the User whilst the client is connected. This means that any calls made on this extension when the client is not open will not show up on the Users call history.

This should be used when the client is installed in a multi user environment, for example Microsoft Terminal/Remote Desktop Services, Citrix XenApp, VMWare Virtual Desktop Infrastructure (VDI) or when using Agent Hot Desking.

7.1.2 Remote Connection

Overview

The remote connection settings configures how the client will connect when they use the remote location to connect. The same options as the Local Connection are available except for the broadcast options.

This simply means that we are telling the software that the connection to the server is via a different network to the server (usually the public internet if configured)

7.2 User Preferences

Overview

The preferences section enables the options that are specific for the user to be configured. The following options are available.

Section	Description
General	Configures the user's language, notification and status change on computer lock settings.
Information	Configures the user's Hot Desk, Voicemail and Meet-Me Conference settings.
Numbers	Configures the user's telephone numbers and view Active Directory and DEE imported numbers.
Chat	Configures the user's chat preferences.
Profile Image	Configures the user's personal profile image.

7.2.1 General

Language: This controls what language Phone Manager will be configured with to enable multi-lingual support. When this is changed all of the captions, prompts, tips and help will be displayed in the selected language.

Notifications: Phone Manager can automatically be activated when a call alerts the associated extension. This provides fast access to the Contacts view to be able to see other user's status' and transfer calls. When the call is cleared, Phone Manager will return to its original state.

Status on Lock: To help inform users when you are away from your desk, this feature can be used to automatically set a status when your computer is locked. When unlocked, Phone Manager will return to its original state.

This feature works in 2 modes:

- Presence Profiles Enabled -> If you are using Presence Profiles, Status on Lock will apply the selected Profile when the computer is locked.
- Presence Profiles Disabled -> If not using Presence Profiles, Status on Lock will apply the selected DND State when the computer is locked.

7.2.2 Information

Overview

The Information section allows configuration of MiVoice Office related user settings.

Configuration

Hot Desk

If the associated extension is a MiVoice Office 250 Hot Desk device then Phone Manager will provide login/logout features. As part of these features, Phone Manager can save a user's Hot Desk passcode and can automatically log out the Hot Desk device when it is shutting down.

Logout Hot Desk on Shutdown: When this is checked and the user closes Phone Manager then their hot desk extension will also be logged out.

Save Hot Desk passcode: Tells Phone Manager whether to automatically enter the Hot Desk passcode when logging in. If not selected the user will be prompted for the passcode each time.

Hot Desk Passcode: This is the users hot desking passcode for their hot desk profile. Leave blank is the there is no passcode set.

> Phone Manager must have a connection to MCS in order to log the hot desk out on shutdown. If the application is shutdown when not connected it won't log the user's Hot Desk device out.

Voicemail

Phone Manager can automate some of the process of accessing a voicemail box:

Mailbox number: This is the user's mailbox on the telephone system. This will default to the user's Primary Extension. Configuring this will ensure Phone Manager dials into the correct mailbox even when not connected as a Primary Device.

Prompt for mailbox passcode: When this option is enabled, Phone Manager will prompt for a passcode when retrieving messages and will automatically pass it to the voicemail. If disabled, you must enter the passcode manually on the telephone or using the Phone Manager dial pad.

Save mailbox passcode: If Prompt for mailbox passcode is enabled, Phone Manager can also save the passcode for the Mailbox number so that it only needs to be entered the first time.

Mailbox passcode: This is the user's mailbox passcode. This is used to automatically access their voicemail mailbox when retrieving messages.

Meet-Me Conference

This configuration is used when creating Meet-Me conference appointments using the Phone Manager Add-in for Microsoft Outlook.

Meet-Me Access Code: This is the user's Meet-Me conference access code. This is used to populate the meeting invitations with the correct information.

7.2.3 Numbers

Outside Numbers

User configurable numbers that are visible to other users of Phone Manager. Users can configure as many numbers as they require, each entry can be given a description to describe the number, e.g. Home or Mobile.

When numbers are configured other users will see this number in the list of available numbers when they dial them from the Phone Manager contacts window. Any Active Directory or Dynamic Extension Express numbers will also be visible to other users so there is no need to duplicate them here.

Active Directory

This section of the numbers page contains Home, Mobile and Work numbers that have been imported from Active Directory. These numbers are read-only.

Dynamic Extension Express

If the user's primary device is a DEE device then this section will show all of the user's external numbers that have been imported from their DEE configuration. These numbers are read-only.

7.2.4 Chat

Overview

The User Preference Chat section enable the users chat preferences to be configured.

Configuration

Enable chat notification: This enables the audible notifications to be played when a new chat message is received.

Show chat window when a new message arrives: This controls whether the chat window is opened and takes focus. If not enabled, the chat window will open minimized.

7.2.5 Profile Image

Each user can set a profile image that will be visible to all other Phone Manager users. Pressing the 'Add/Replace' button will launch a file browser to select a photo image to use.

To remove a Profile Image, press the 'Remove' button.

Remember to save changes by pressing 'Apply' when closing the Settings form. At this point the image chosen will be saved on the server and made visible to other users.

7.3 Presence Profiles

Presence Profiles provide mechanism for controlling many aspects of a user's extension. If enabled to use Presence Profiles, each user is given a default set of profiles that they can add to, edit or delete as they require.

Profile information

Each profile has a name which will be visible to other users of Phone Manager when it is selected. The profile name can then be supplemented with Additional Information that can be changed as required and will also be visible to other users.

For example, the profile 'In a meeting' could be supplemented with 'until 4pm' to provide other users with more information about status.

> If the profile selected is configured to enable DND then the Additional Information will be added to the DND status text on the telephone system.

Extension Control

Each Presence Profile can control the following aspects of the user's primary extension:

- Do Not Disturb
- UCD Hunt Group Status
- Forwarding
- Dynamic Extension Express

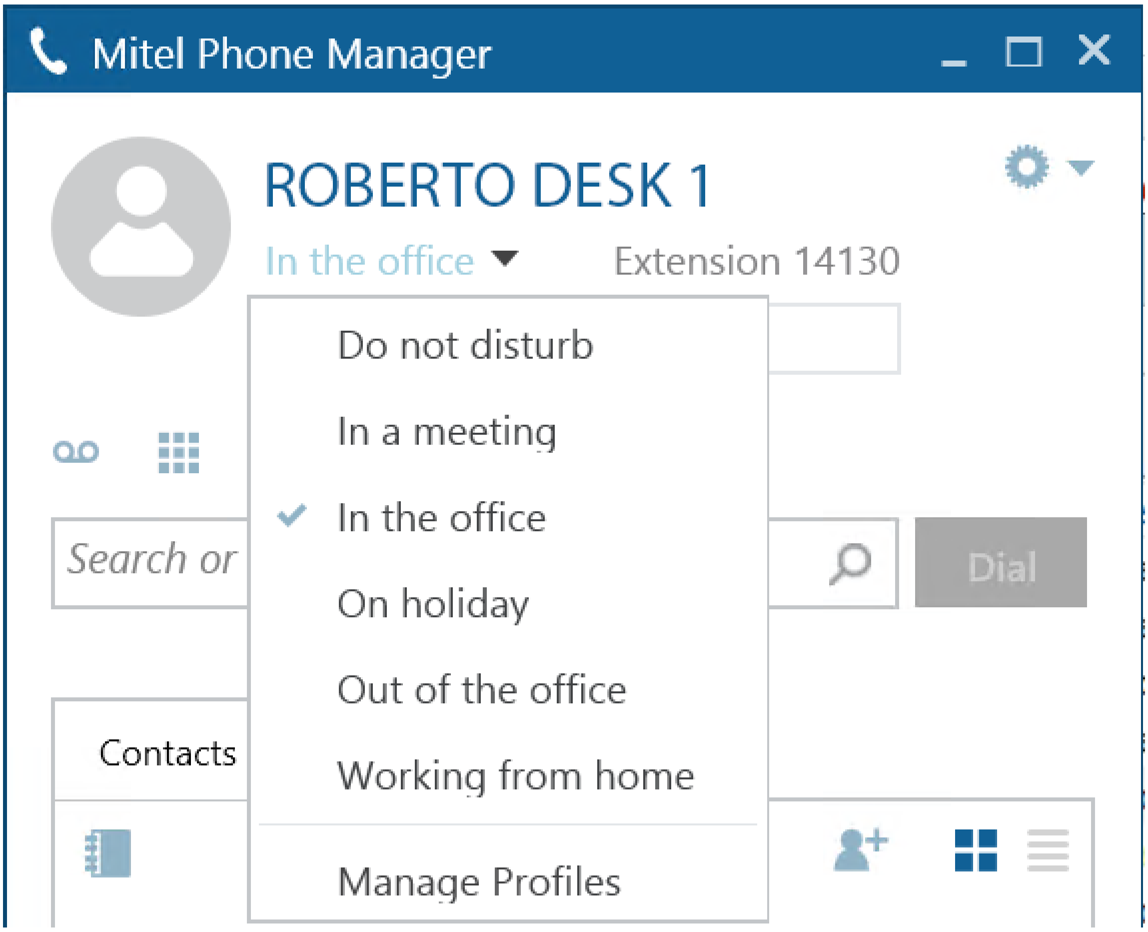
When a profile is changed, any extension status changes are applied to the user's primary extension and any extension they have Phone Manager connected to (apart from the DEE control which is only applied to the primary extension).

For more information on Presence Profiles, read the section on Editing Presence Profiles.

> Presence profiles can only control whether each of your devices is active or not (will ring or not). Configuration for what order they ring in must be made on the phone system.

Using Presence Profiles

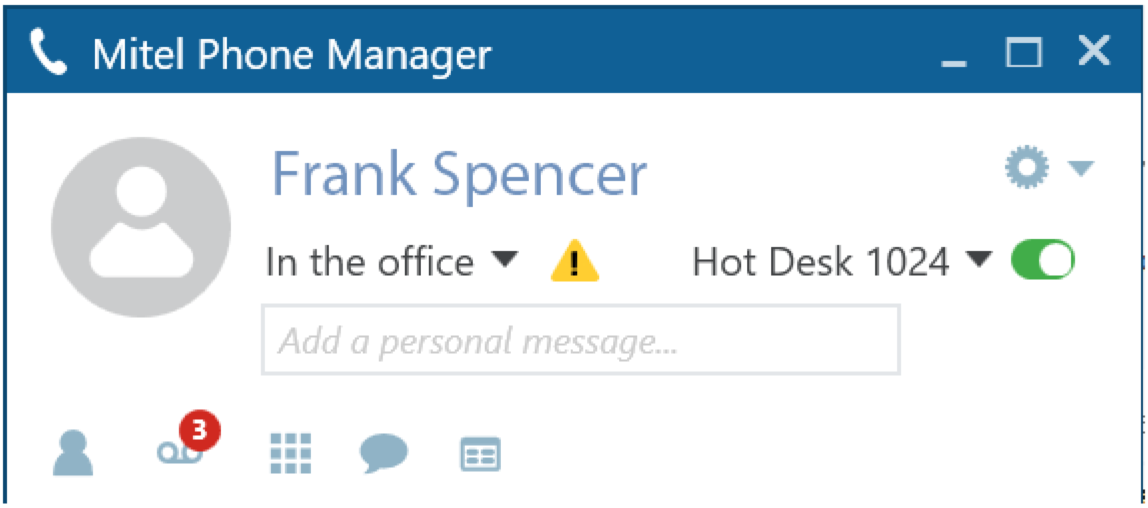
The currently in use profile is visible under the username at the top of the main Phone Manager window. To change the profile in use, use the drop down menu to the right of the current profile and select the new profile to apply. The currently selected profile will have a tick next to it.



Selecting 'Manage Profiles; is a shortcut to edit the Presence Profiles in Settings.

Configuration Warnings

In some scenarios a warning may appear to warn of a possible configuration issues.



When the warning triangle appears it will be for one of the following scenarios:

Your device status does not match your current Presence Profile configuration

When this message displays, it means the status of the user's Primary Extension is not as configured on the currently selected Presence Profile. This could be because a manual change has occurred on the extension such as it has manually been placed in DND. To fix the configuration left-click on the warning triangle and accept the prompt that appears.

Your extension will not ring with the currently selected profile

When this message displays it means that the extension that Phone Manager is currently connected to is not configured to ring in the currently selected Presence Profile. If the extension is required to ring then edit the current profile or select another one where it is configured to ring.

7.3.1 Editing Presence Profiles

Default Profiles

When first using Presence Profiles a default set of profiles will be visible:

In the office	Default profile, enables all of a user's DEE destinations, no DND, no Forwarding, Group Calls (UCD) enabled
Do Not Disturb	All DEE destinations enabled, DND set to on, prompt on selection. No Forwarding, Group Calls (UCD) disabled
Out of the office	External DEE destinations enabled only, no DND, no Forwarding, Group Calls (UCD) disabled
In a meeting	Only Voicemail DEE destination enabled, DND on, no Forwarding, Group Calls (UCD) disabled
Working from home	Only Voicemail DEE destination enabled, DND off, Forward Immediate with prompt for the destination, Group Calls (UCD) disabled
On holiday	Only Voicemail DEE destination enabled, DND on, no Forwarding, Group Calls (UCD) disabled

Adding/Editing Profiles

Each profile can be edited as required or new profiles can be added if needed. The following section outlines each area of a Presence Profile:

Description: The description of the profile. This will be used to choose the profile when applying it and will also be visible to all other users to define your status.

Additional Information: Supplementary information to the description, this can be permanently set here or edited on the main Phone Manager screen after the profile has been selected.

Prompt on selection: If required, Phone Manager can be configured to prompt for the Additional Information each time the profile is selected.

Send calls to: Outlines where inbound calls should be sent to. There are three options to choose from:

Primary Extension	When selected, DEE will be disabled on the primary extension and calls will only ring this one extension.
My ring group	When selected, each of the DEE destinations that have been configured on the telephone system will be shown. Destinations can be configured to ring or not by checking and un-checking the relevant boxes. **Note: If 'My ring group' has been selected, at least one destination must be set to ring.**
Voicemail	Applies a forward all calls to Voicemail
Other	Allows the user to configure where their calls should be forwarded to. If required the destination for the Forward can be prompted for when the profile is selected.

> If the profile selected is configured to enable DND then the Additional Information will be added to the DND status text on the telephone system.

Do not disturb: Enables or disables DND. A specific DND message can be selected or Phone Manager can be configured to prompt for the DND message at runtime. Any Additional Information will be used as the DND Text property when setting the DND status on the telephone system.

Group Calls: Controls the UCD hunt group remove/replace feature. When enabled, the primary extension will receive calls from any UCD hunt groups it is a member of.

Chat Notification: Controls whether the chat notification audible alert gets played or not.

Deleting Profiles

Presence Profiles can be deleted as required, however the currently selected profile cannot be deleted so that there will always be one profile remaining.

7.4 Softphone

Overview

The softphone settings enable the User to configure how the built in softphone operates and integrates with Phone Manager.

Phone Manager's softphone requires a CAT F SIP extension license on the MiVoice Office 250 PBX

Before using the softphone please read and understand the issues raised in the E911 Warning, Emergency Calls and Security section and the limitations of using a softphone in the Softphone Limitations section.

The softphone has the following configuration sections.

General	Configuration of general settings.
Audio	Enables the audio sources for the speakers and microphone that are to be used by the softphone.
Codecs	Enables the audio codecs that will be available to the softphone.
Quality	Configures options relating to voice quality and echo cancellation.
NAT and Firewalls	Configures firewall and NAT configuration options when connecting remotely.
Keep-Alives	Configures the keep alive settings for re-registering the softphone to prevent timeouts.

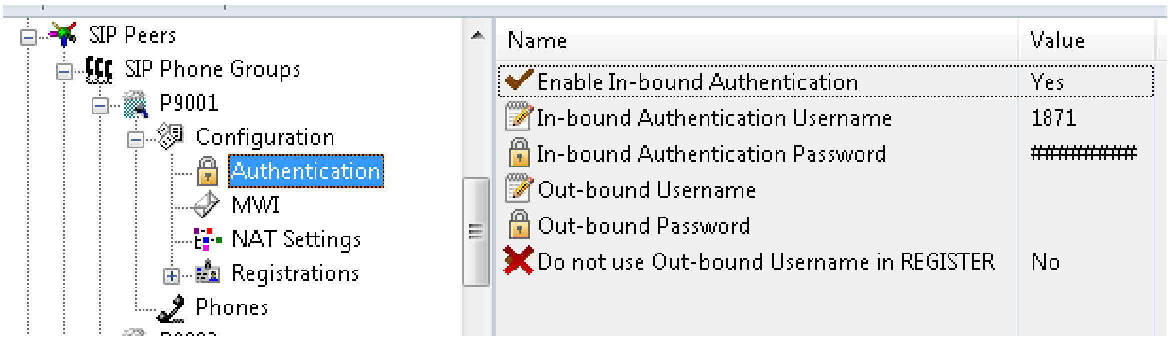
The Softphone support within Phone Manager requires some configuration to be performed within the PBX. The sections below outline the changes that are required for the SIP Extension's Phone Group and Call Configuration.

SIP Phone Group

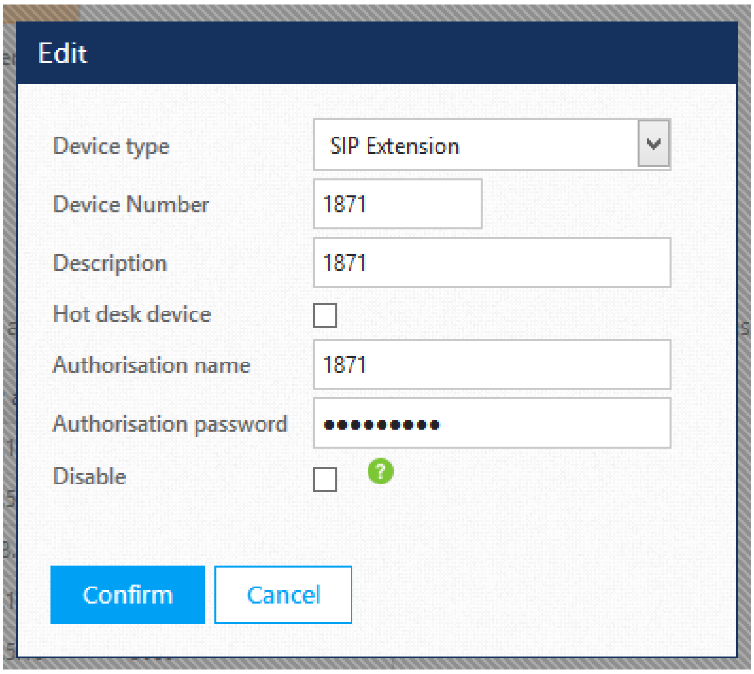
Authentication

When using a SIP Softphone it is critical that authentication is used to help prevent unauthorized access to the PBX. To configure authentication a username and password need to be set on the PBX for the relevant extension and on device configuration of the Communication Service.

To configure the authentication on the PBX follow Mitel's recommendations by enabling In-bound Authentication and setting a complex username and password combination on the associated *Sip Phone Group* for the extension.

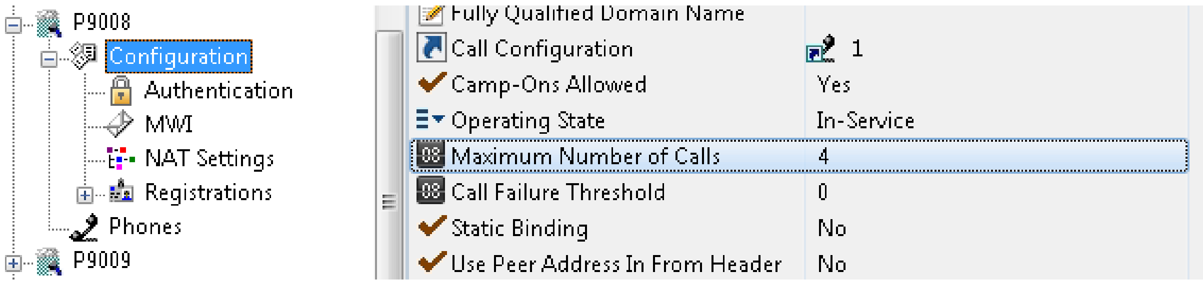


This same username and password combination would then need to be set on the **device configuration** on the Communication Service for this extension.



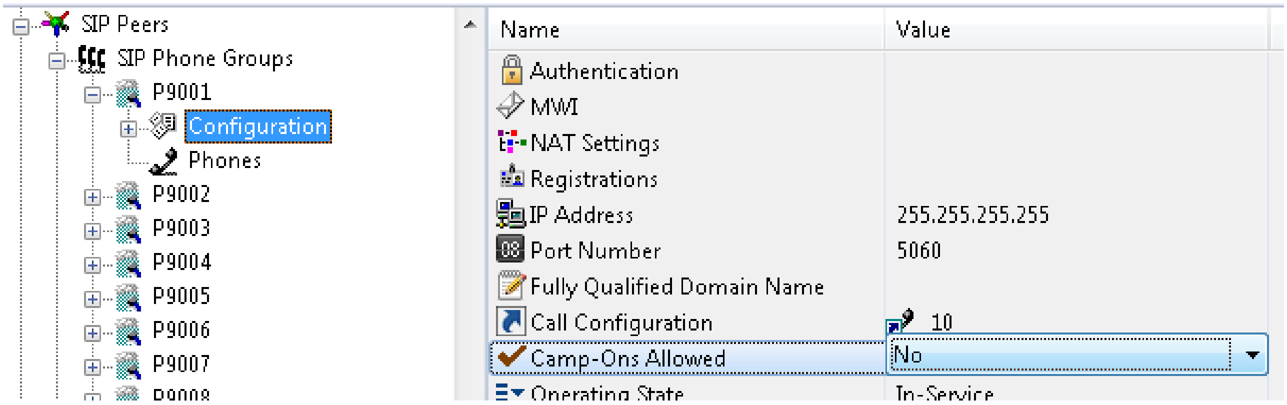
Maximum calls

The softphone supports up to 4 concurrent calls, for example two calls on hold, one connected with an announced transfer. The number of maximum calls needs to be configured to 4 within the Mitel Database Programming as the default value for this is 1. This can be set in the SIP Phone Groups section for the extension as shown.



Camp-ons

The PBX can only support up to 4 concurrent SIP calls at the Softphone, so it is recommended to set **Camp-Ons Allowed** to *No*. This can be set in the SIP Phone Groups section for the extension as shown.



DTMF Payload

The softphone requires that the DTMF payload is set to 101. This can be set in the SIP Phone Groups section.

Supports Ad Hoc Conferencing

This setting needs enabling to support conferencing from the Call Banner.

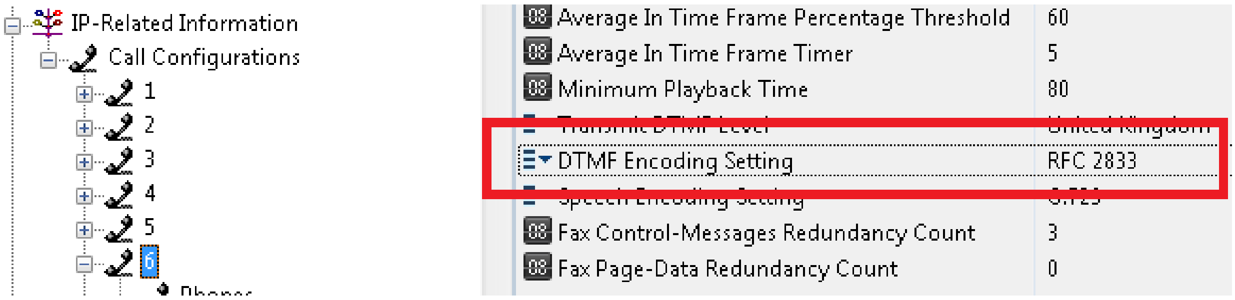
Use Registered Username

This setting needs enabling when connecting the softphone through an MBG.

Call Configuration

DTMF Support

The softphone only supports the RFC 2833 DTMF encoding and this needs to be configured within the MiVoice Office 250 DB Programming IP Related Information --> Call Configurations section for the corresponding SIP Phone Groups as shown.



Speech Encoding

Phone Manager Desktop Softphone supports G.711 & G.729 speech encoding

Audio Frames/IP Packet

The audio frames per IP packet must be set to 2.

> It is important to connect only one softphone to each extension number on the telephone systems. Registering more that one SIP extension with the same credentials at the same time is not supported by the telephone system and will cause problems.
>
> If using the desktop and mobile versions of Phone Manager Softphone for a single user then ensure that each application uses different extension numbers.

7.4.1 E911 Warning, Emergency Calls and Security

WARNING

Do not dial emergency hotline numbers from the Phone Manager SoftPhone when remote from the MiVoice Office 250 PBX. In the case of an emergency, dial the appropriate local emergency-service number directly, or use the nearest local public phone to dial an emergency hotline or use your cell phone mobile.

The SoftPhone communicates through a central telephone system that routes all emergency calls directly to a number that is local to the phone system. If the SoftPhone is not at the same address as the central system, then the emergency service call will not be routed to the proper location.

Therefore, if the SoftPhone does not stay within the premises of the central system, you must configure the SoftPhone’s programmable keys to dial the local police or fire departments directly, and you must clearly label the key icons. If the SoftPhone is mobile, meaning it is used in multiple locations, you must know the direct emergency-contact numbers for each location.

In the case of an emergency, you are responsible for determining the nature of the emergency and dialling the appropriate emergency-service number directly. You must provide the emergency personnel your location and telephone number because the emergency service may not receive accurate Caller ID (CLI) or Calling Party Number (CPN) identification information automatically.

SECURITY

The implementation of SIP within the MiVoice Office 250 like many other systems is NOT based on a secure data connection using TLS and certificates, and by definition is not secure.

With this in mind when using SIP outside of your firewall infrastructure, ensure that every care is taken that a level of security is in place in line with your organisation's internal security policy. This could involve (but may be not limited to) using NAT or establishing a secure VPN connection between remote clients and the corporate LAN.

Should you be in any doubt please consult the relevant Mitel documentation on securing your MiVoice Office 250 installation for SIP extension communications.

7.4.2 General

Overview

The client has a built in SIP softphone but there may be situations when a third party SIP extension, for example Xlite, Bria etc., needs to be used and associated with Phone Manager. When Phone Manager connects it automatically knows that the extension associated with the User is a SIP extension so will start the built in softphone and register the SIP device. Checking the **Third Party SIP extension** option will prevent this from happening when it runs.

Using a third party SIP extension instead of the built in softphone will significantly reduce the features that are available since Phone Manager softphone uses the CTI connection to provide a more seamless experience for the User. See the Softphone Limitations section for details.

7.4.3 Audio

Overview

The softphone uses the microphone and speakers attached to the local computer to provide audio for the calls that are made. When the softphone starts it will try and use the first microphone and speakers that it finds. To override this selection select the **Speaker** and **Microphone** from the options available.

For both the speaker and microphone the volume levels can be adjusted and using the level indications you can see what impact changing this will have. To test the speakers click on the **Play** button and a message will be played back through the speaker selected. To test the microphone just speak into the microphone.

Headsets

When using Phone Manager in softphone mode a headset is required to relay audio between callers. Phone Manager works with headsets that use the 3mm microphone/headphone jacks on a computer or can be used with a USB headset. Phone Manager has been tested for compatibility with the following headsets:

- Plantronics C310, CS60
- Jabra GN9350e
- Addasound Crystal 2822, 2821
- Microsoft LifeChat LX-3000
- Agent 500, W880

API support has been added for both Plantronics and Jabra headsets to allow users to answer/clear softphone calls directly from the headset without having to touch the computer.

7.4.4 Codecs

Overview

The softphone supports several different audio codecs that can be used depending on the quality of the audio required and the amount of network bandwidth available. By default the softphone supports G.711 A-Law, G.711 Mu-Law and G729. The softphone will negotiate with the PBX to determine the one to use based upon what is programmed on the PBX.

7.4.5 Quality

Overview

The softphone can be configured with different audio quality settings depending on the environment that the softphone is operating in. In most circumstances the settings should be left at the default.

Echo cancellation provides a way of automatically removing echo from the call, for example echo can occur when using a loud speaker and the microphone may pick up the audio from the speaker. Removing the echo will also minimise the network bandwidth used as the silence suppression will prevent the echo from travelling across the network. The **Echo delay** configures the delay of the acoustic echo in milliseconds.

Auto gain control provides a way of balancing out the volume levels to provide an average level without excessive highs or lows. The **Max gain** setting configures the maximum volume level permitted in decibels.

Noise reduction level configures the amount of noise reduction that is used. Background noise or random white noise can be reduced using these options. The extent of reduction can be controlled from **No Reduction**, **Low**, **Medium** or **High**.

The softphone uses a dynamic jitter buffer to handle out of sequence and delayed voice packets to increase quality. This is always on and cannot be disabled.

7.4.6 NAT and Firewalls

Overview

Using a softphone remotely causes the voice traffic to have to flow through multiple switches, routers, firewalls etc. to reach its destination. This can cause audio problems as the devices that handle the voice packets may use a process called NAT traversal. NAT traversal is a standard technique for establishing and maintaining connections between remote devices on different networks, i.e. the softphone and the PBX.

This is important because there is no single method for working with NAT that is successful in every scenario. There are several different options that the softphone supports. Essentially each method is trying to establish which public IP address to use as the destination for the voice packets.

Session Traversal Utilities for NAT (STUN) is a standardised set of methods, including a network protocol used in NAT traversal for applications of real-time voice, video, messaging, and other interactive IP communications. STUN is an acronym for Session Traversal Utilities for NAT, and is documented in RFC 5389.

Traversal Using Relays around NAT (TURN) is a protocol that allows for an element behind a Network address translator (NAT) or firewall to receive incoming data over TCP or UDP connections. It is most useful for elements behind symmetric NATs or firewalls that wish to be on the receiving end of a connection to a single peer. TURN does not allow for users to run servers on well known ports if they are behind a NAT; it supports the connection of a user behind a NAT to only a single peer.

None where no NAT traversal method is used but this can only be used for connections where the server and client are on the same local network.

Manual where the public IP address to use is manually configured.

Auto Detect where the softphone attempts to automatically determine the type of method to use but if this fails then will fall back to the configured option.

> This is not just an issue with the built in softphone but any SIP extension.

7.4.7 Keep-Alives

Overview

The softphone supports sending keep-alive requests back to the PBX. This prevents the network connection from being closed by any firewalls/routers that may cause the softphone to lose communication when connecting via NAT.

There are three keep-alive options available that can be used depending on the network configuration.

Do not send keep alive messages: This disables any keep alive messages from being sent.

Re-register the softphone: This re-sends a SIP Register request to the PBX.

Send Options message: This sends a SIP Options request to the PBX.

When keep alive requests are being sent, the time interval can be set to determine how often they are sent out. The default is every 300 seconds or 5 minutes.

7.4.8 Softphone Limitations

Overview

The softphone does not have access to all of the same features as a Mitel MiNet device (or desk phone). The following limitations apply to the all SIP devices on the MiVoice Office 250 PBX:

- Redial is not supported (feature code 380).
- Mute causes both parties audio to be muted out, unlike with a MiNET device where only the Mitel extension audio is muted.
- Mitel Hot Desk
- Unable to transfer a connected call straight to a Voicemail box

In addition to this the following restrictions apply to using a third party SIP extension (i.e. not the in built softphone):

- Cannot make a call using Phone Manager, this means features like highlight and dial and TAPI will not work.
- Cannot place a call on hold or retrieve using Phone Manager.
- When making a call via the SIP extension the dial prefixes need to be set by the User, i.e. a user has to manually enter the digits for an outside line.

7.5 Hot Keys

Overview

Hot Keys enable Users to set a combination of keystrokes to access commonly used features within Phone Manager. The configuration of the hot keys is specific to each User. The following list of hot key actions are supported:

Action	Description
Answer call	Answers the call currently ringing. If there are any calls in progress then this is ignored.
Clear call	Clears the call that is connected to the extension.
Directory search	Brings the main window to the front and sets the focus and cursor to the *Search or Dial* field.
Do not disturb	Toggles the DND state at the extension. If no message is pre configured then it will prompt for the message to use.
Highlight and dial	Dials the number that is currently highlighted in other applications.
Hold or retrieve	If a call is on hold then retrieves the call otherwise puts it on hold.
Launch call history	Brings the main window to the front and sets the call history tab in focus.
Launch dial pad	Shows the dial pad window.
Mute	Mutes the audio for the current call. If this is a softphone then both sides of the call are muted otherwise only the audio from the Users extension is muted. See Softphone Limitations.
Redial	Redials the last number using the Mitel feature (default code 380). Not supported on softphone (use call history instead), see Softphone Limitations.
Restore Phone Manager	Brings the main window to the front.
Volume up	Increases the volume level. See the Volume Control section for details.
Volume down	Decrease the volume level. See the Volume Control section for details.

Configuration

To configure the hot keys:

1. Open the *Settings* window.
2. Select the *Hot Keys* tab.
3. Double click on the hot key entry to configure.
4. Each hot key needs to be enabled, check the **Enabled** option to do this.
5. Select the **Key** to use for the hot key.
6. Check the **Alt**, **Ctrl**, **Shift** and/or **Win** checkbox's that will be used in combination to the **Key** selected.
7. Click on **Apply** to save the changes/

⚠ Always configure the hotkeys to use at least 3 combinations, for example Alt + Ctrl + D. Using simpler combinations may result in conflicts with other application that are running at the same time.

7.6 Macros

Overview

Phone Manager Professional license supports a scripting interface to allow VBScript macros to be developed. They can then be configured to trigger on a manual User action, i.e. a toolbar button action, or automatically on pre-defined call events. The scripting interface provides access to the call information that can be used within the script and extra methods to control the extension and other features, i.e. call recording.

For example this VBScript example will display a message box when an incoming call is received and display the caller id:

```
MsgBox "Call from " & PhoneControl.CLI
```

> See the Phone Manager Macro API reference for more information.

Configuration

The macro design and configuration is available for Users who have the *Allow macro editing* option enabled on their *Client Profile* on the server. Without this option Users can only change the **Enable event-driven macros** option. This controls if the macros that have been assigned to the User will be triggered on the associated call events.

When creating new macros they are first designed and tested from within this section. When this is complete they can be published and this makes them available on the server. Once published they can then be assigned to the relevant Users. A copy is made of the local version of the macro and this then cannot be edited. Any updates would need to be made on the original local version and then re published. Users would then need to be reassigned to this new published version. This provides a level of security to prevent macros being deployed without permission.

The list of macros shown in the *Macro Configuration* section only shows the local macros not published to the server for this User. To see the list of published macros see the *Macros* section on the server user interface.

To create or edit a new macro:

1. Click on the *New* or *Edit* button.
2. Enter a **Name** that will be used on the server to identify this macro.
3. Enter a **Description** that can be used to detail what this macro is for.
4. Select the call event to automatically trigger the macro.
    - 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.
5. Enter the macro text in the **VB Script** section.
6. Use the **Test** button to validate the syntax. If there are any errors then a message box will be displayed indicating the error.
7. Click on **Save** to save this macro.

To publish a macro:

1. Select the macro from the list of macros available.
2. Click on **Publish**.
3. Enter a new name for the macro, it is recommend to include a version or revision number.
4. Click **Ok**
5. From the server user interface, assign this to the relevant Users.

To delete a published macro:

1. From the server open the Site -> Features -> Phone Manager -> Macros section
2. Select the macro and click on **Delete**.

7.7 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.

Configuration

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**.

7.7.1 Goldmine

Overview

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

Supported Versions

The following Goldmine versions are supported.

Version	Supported
Goldmine v7.0 (SQL)	✔
Goldmine v8.0 (SQL)	✔
Goldmine v9.2 (SQL)	✔
Goldmine v2013.1 (SQL)	✔
Goldmine v2014.2 (SQL)	✔

Features

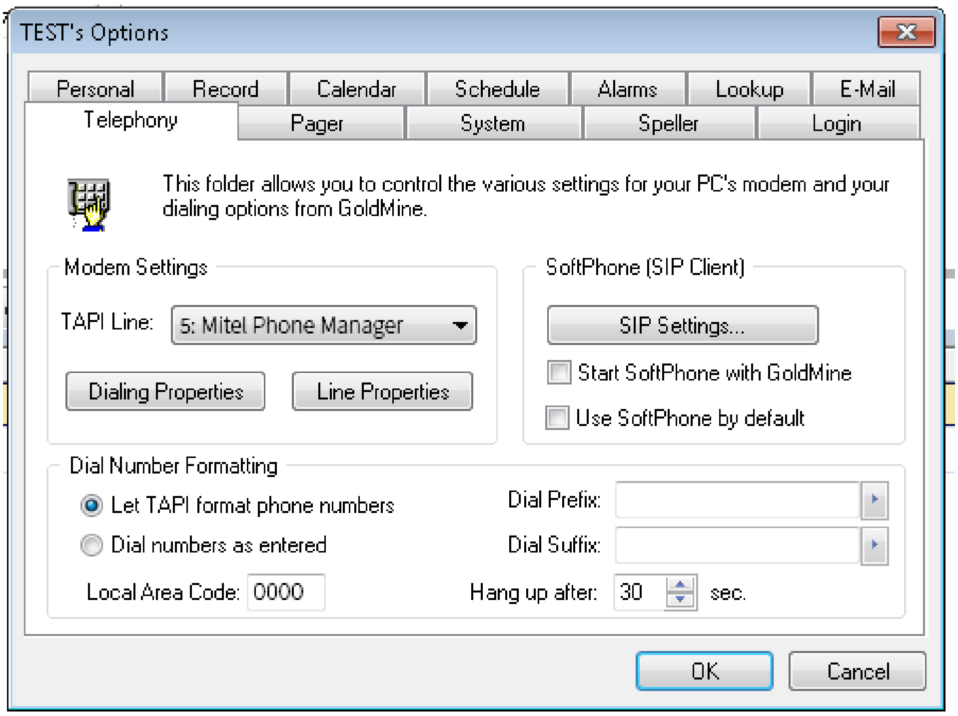
Integration supports the features listed below:

- 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.

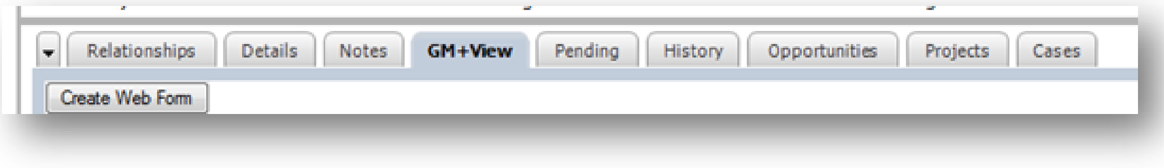
> ⚠ See the Phone Manager User Guide for TAPI requirements

Click to dial - GM+

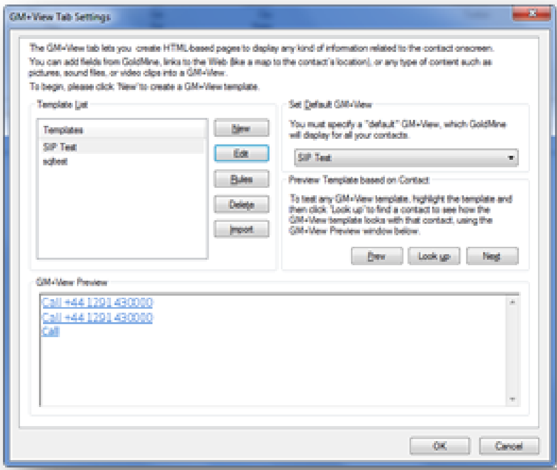
Goldmine supports dialling out directly using a GM+ View that converts the telephone numbers into clickable hyperlinks that call the number when selected.

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.

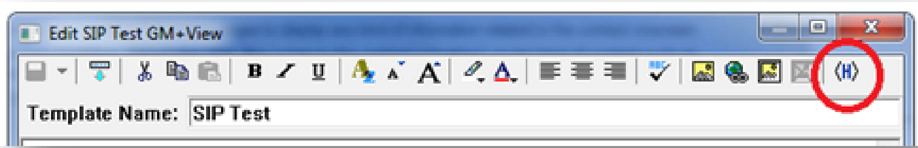
GM+ Views once created change their content based upon the currently selected contact within Goldmine making it ideal for creating hyperlinks. GM+ View tab will need to be enabled by a Goldmine system administrator for clients, and can only be edited / created by a Goldmine Administrator.



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.



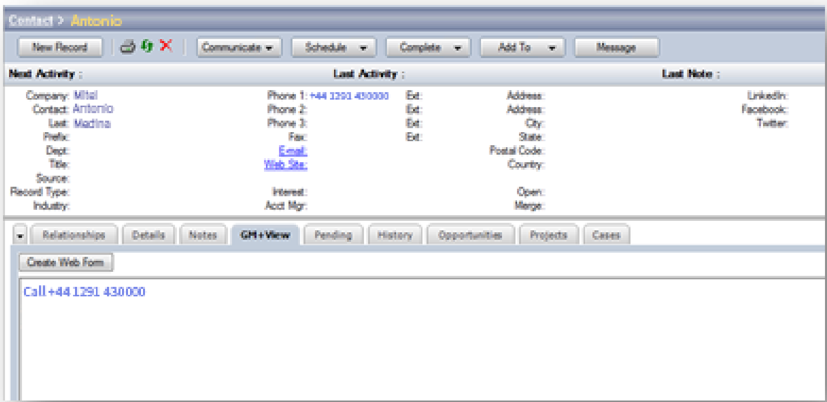
When creating a template you will be provided with the Goldmine template editor, the first step should be to click the HTML editor button to change it to its HTML editing view (Highlighted in red in the image below).



The following HTML snippet can be pasted into the editor:

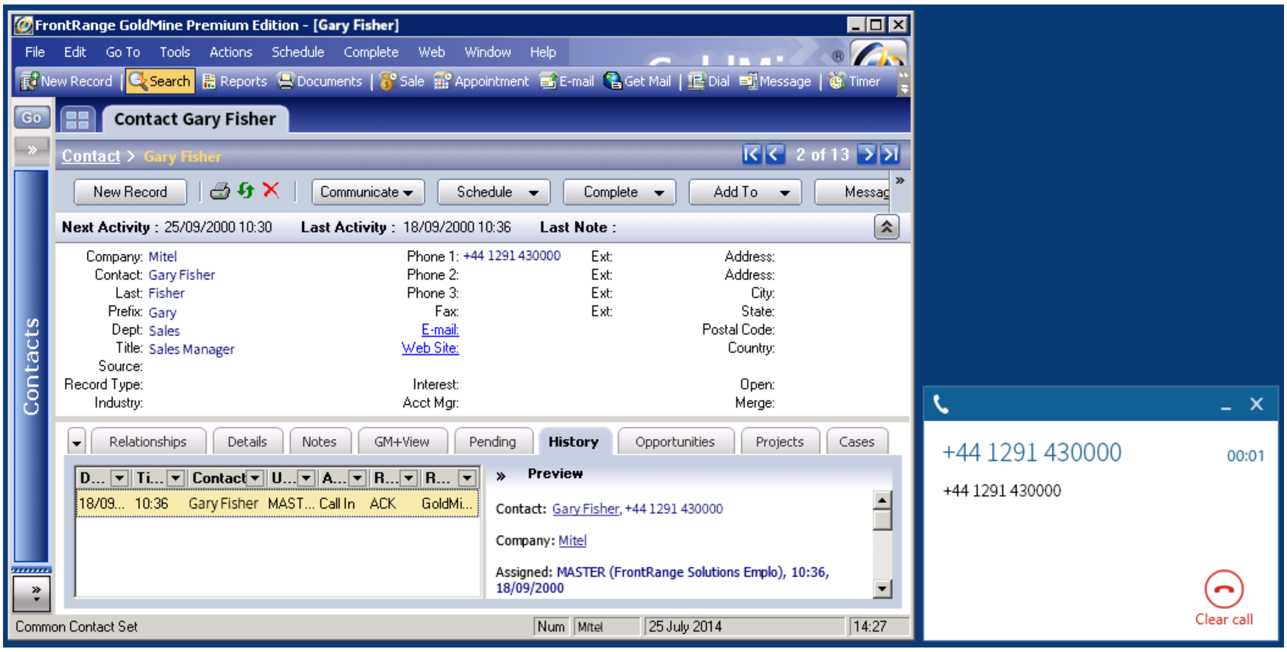
```
<a href="sip://&lt;&lt;&amp;phone1&gt;&gt;">Call &lt;&lt;&amp;phone1&gt;&gt;</a>
```

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.

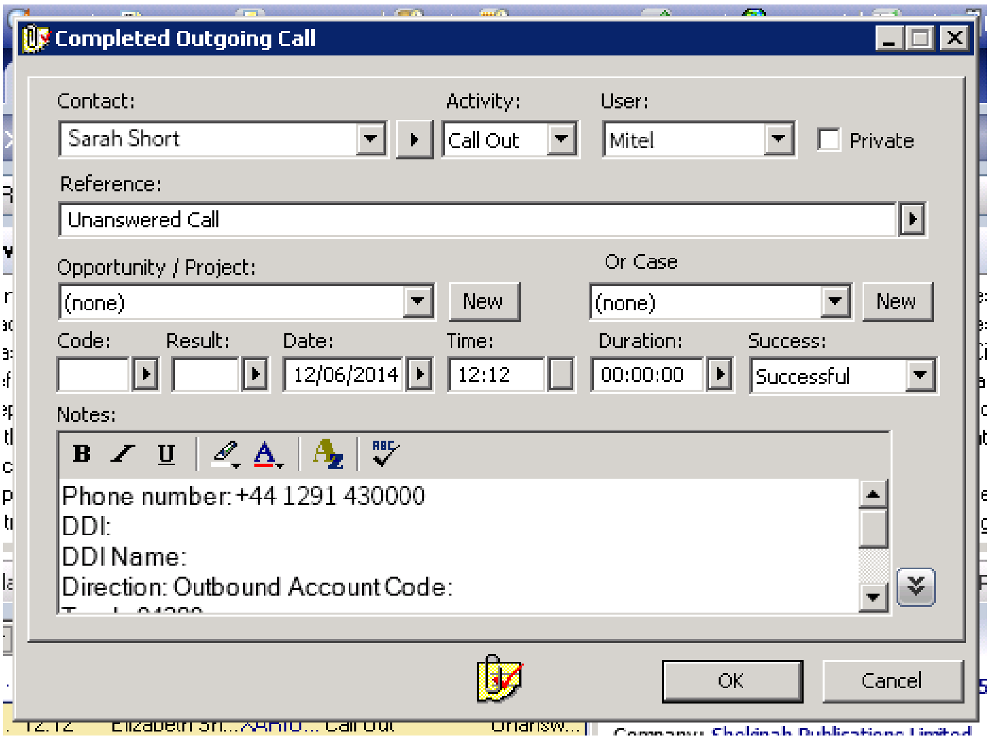
US Telephone Formats			

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.

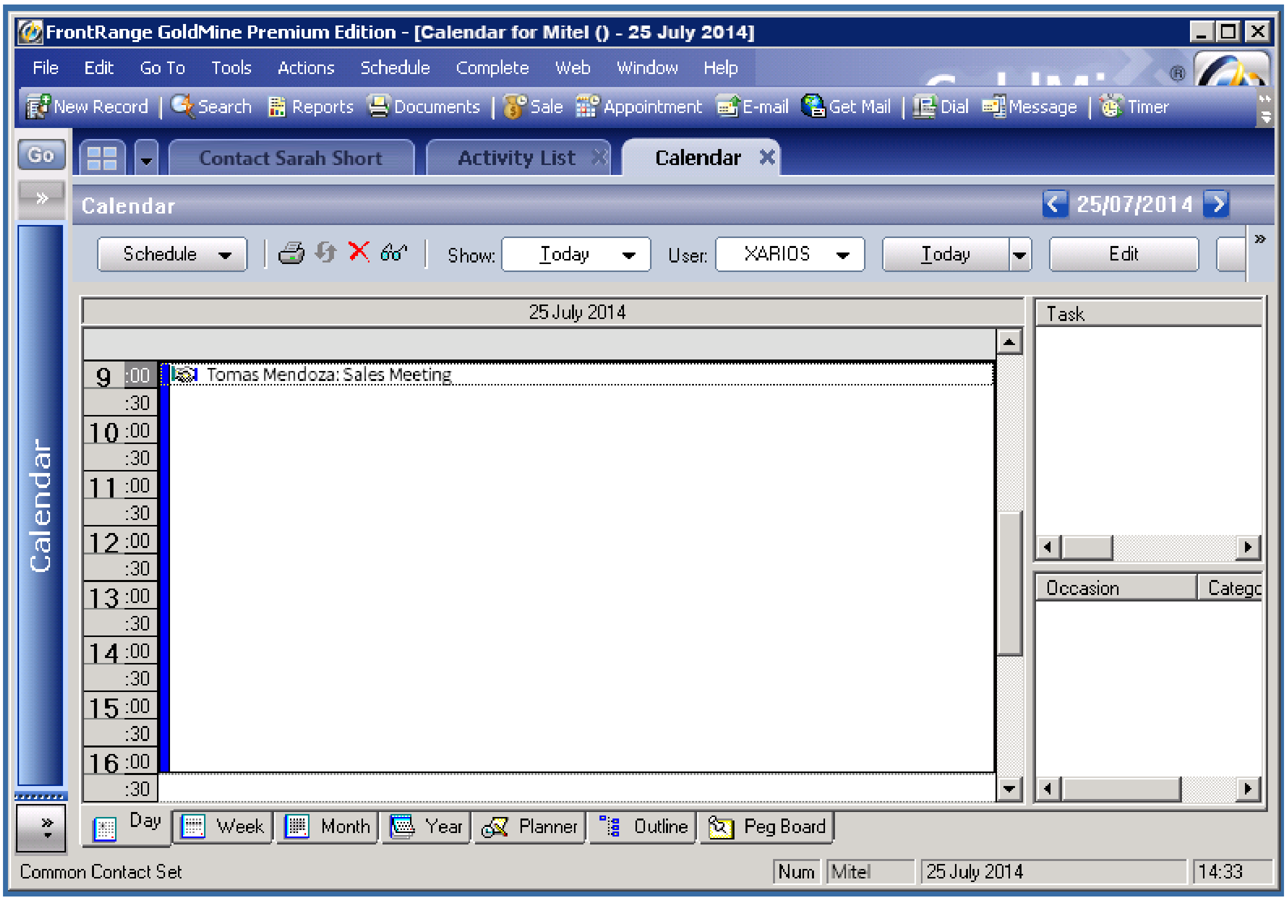


Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction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

7.7.2 Maximizer

Overview

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

Supported Versions

Version	Supported
2015 (v13.0) Desktop Client	

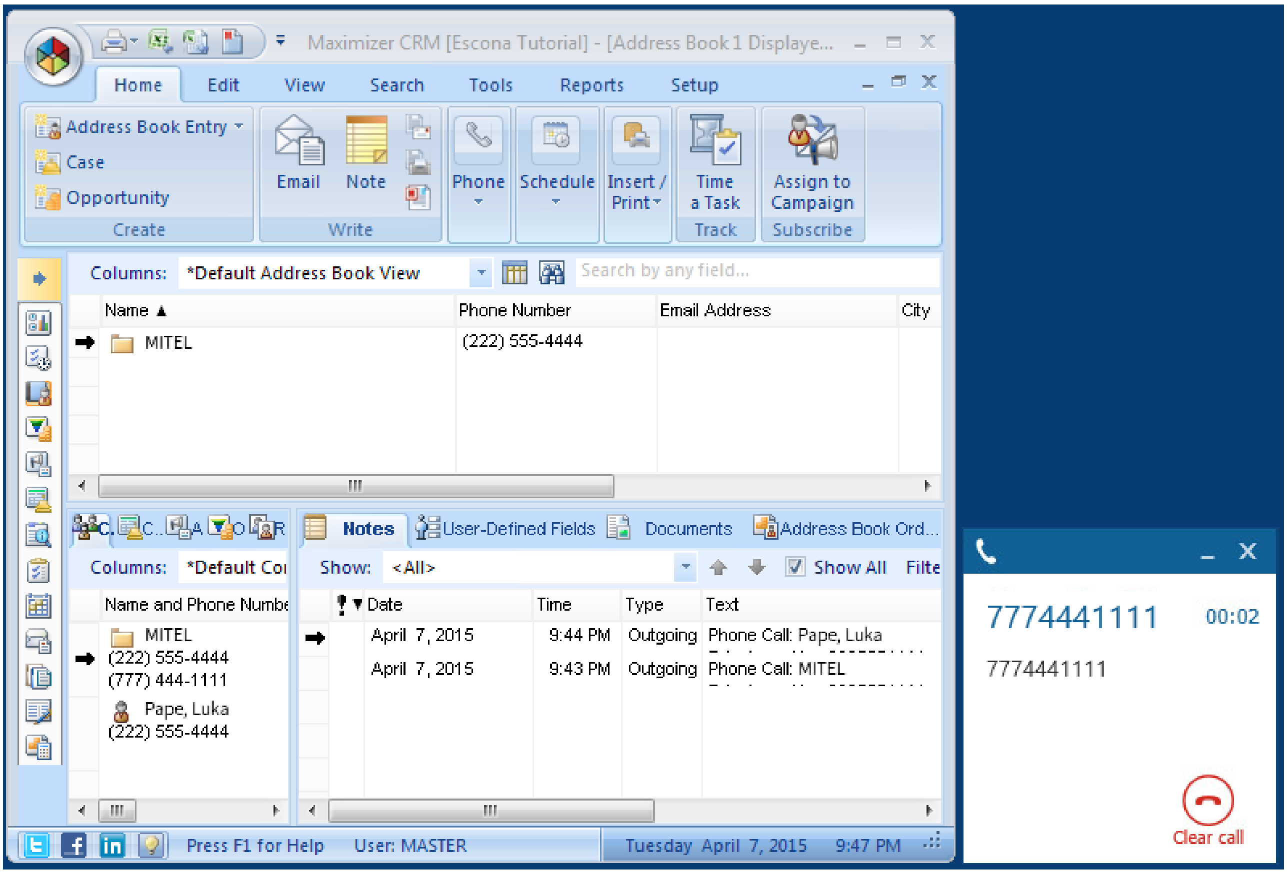
Features

Integration with Maximizer supports the features listed below:

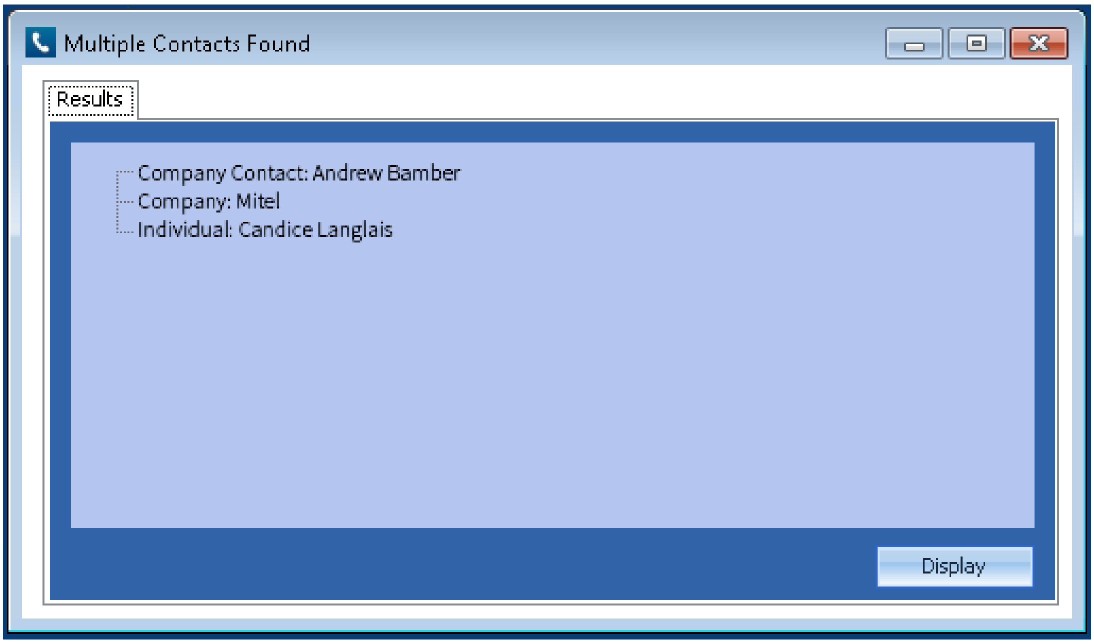
- Screen pop
- Automatic call history entry

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.

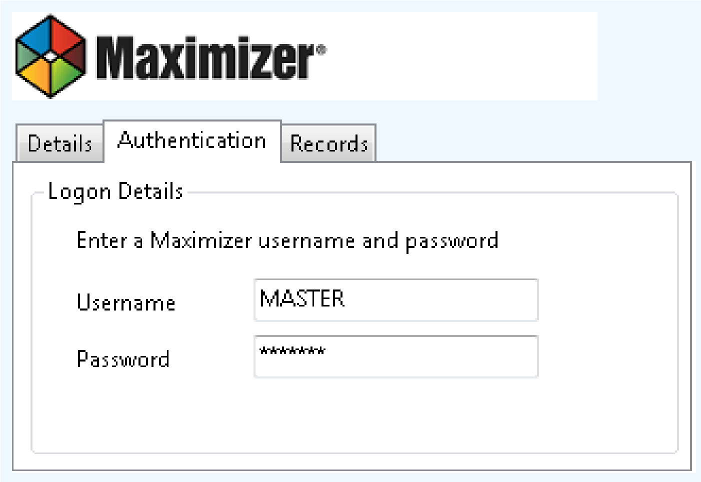
The record is automatically created with the information relating to the call entered into the relevant fields.

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

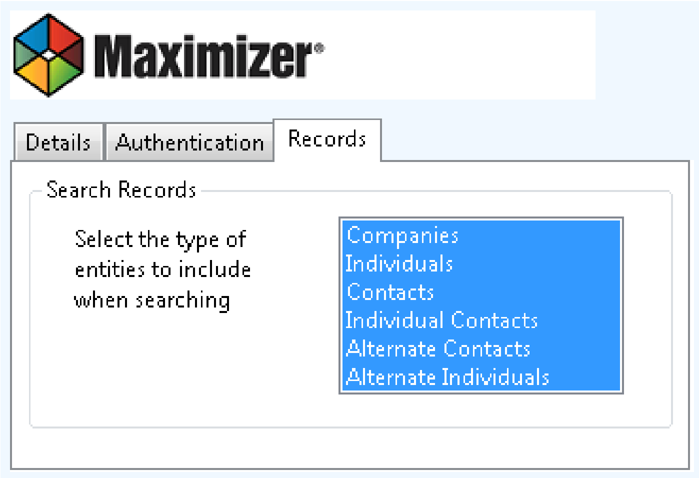
The database authentication details used to connect to the Maximizer database are configured on the *Authentication* tab.



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.



7.7.3 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

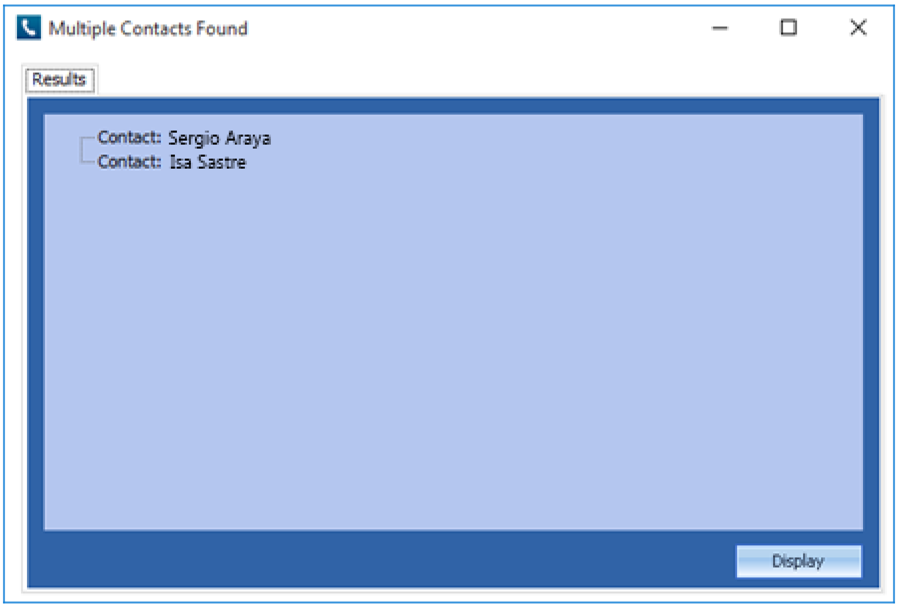
Integration with Microsoft© Office 365© supports the features listed below:

- 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		

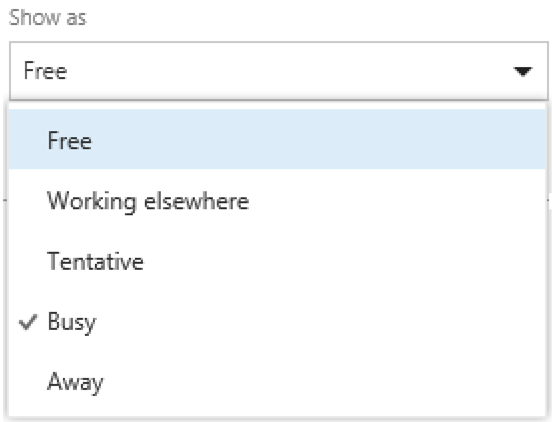
The default formats for the US are shown below. This is based on the number 9876543210 being searched for.

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		

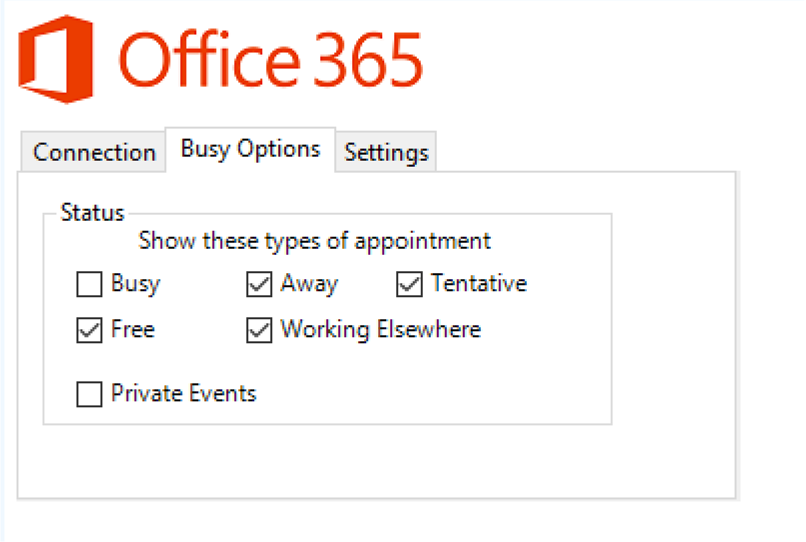
Calendar & DND synchronisation

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.

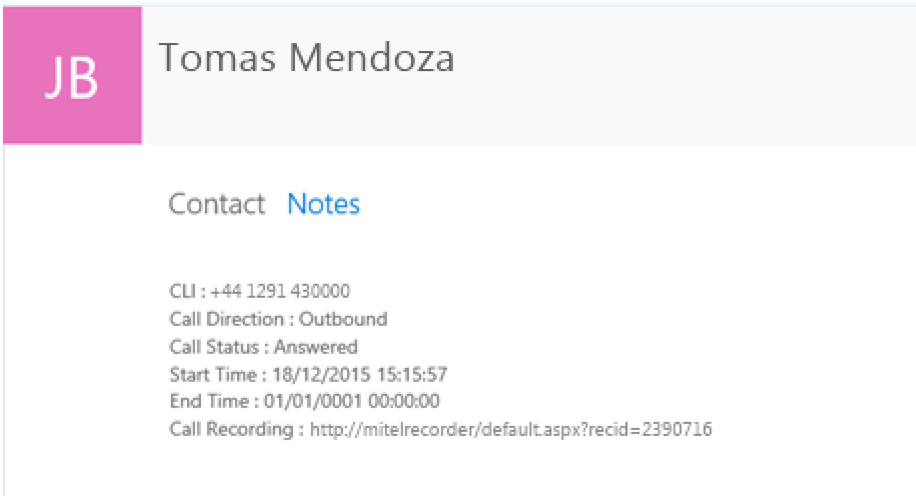


From the Busy Options tab check each entry to include this type of busy status.



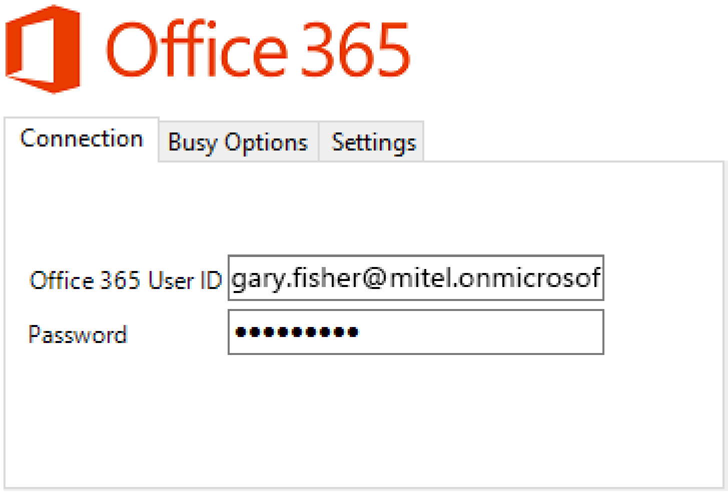
CallHistory Entry

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.

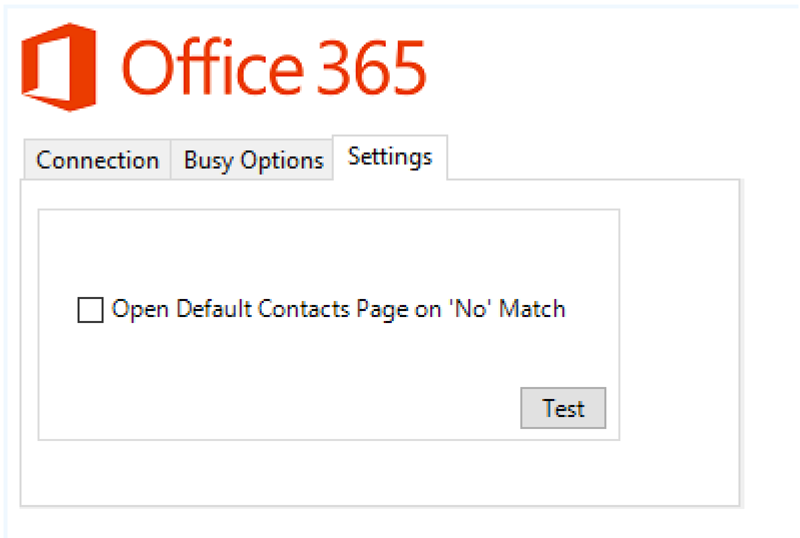


Configuration

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.

7.7.4 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

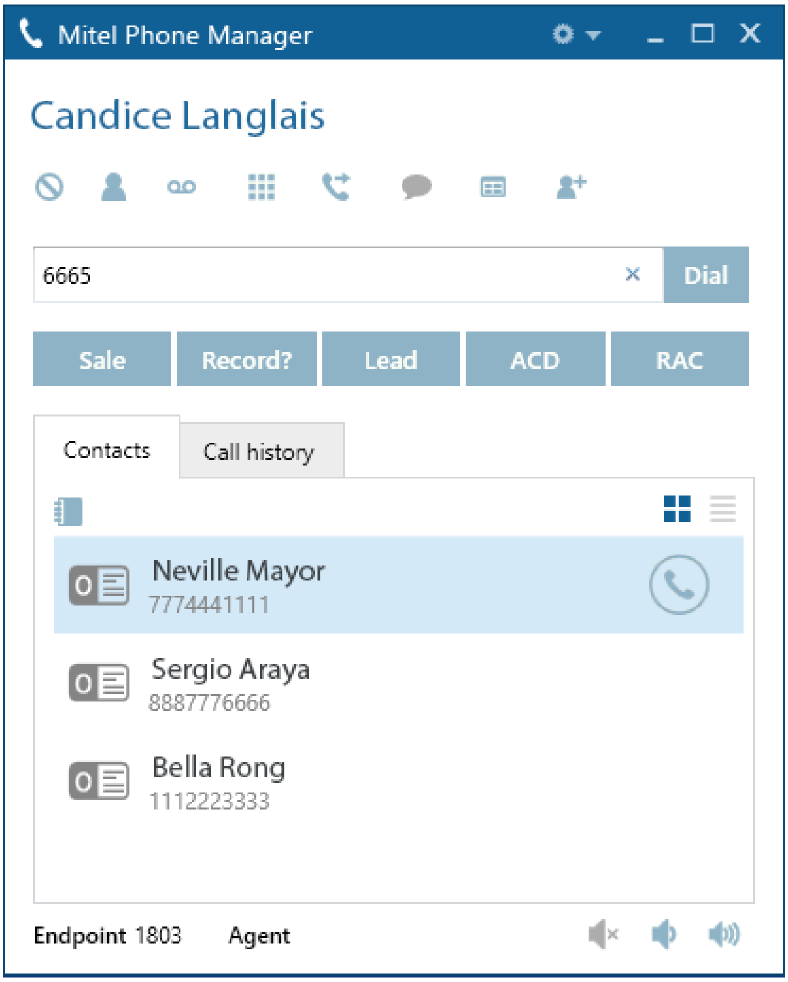
Features

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

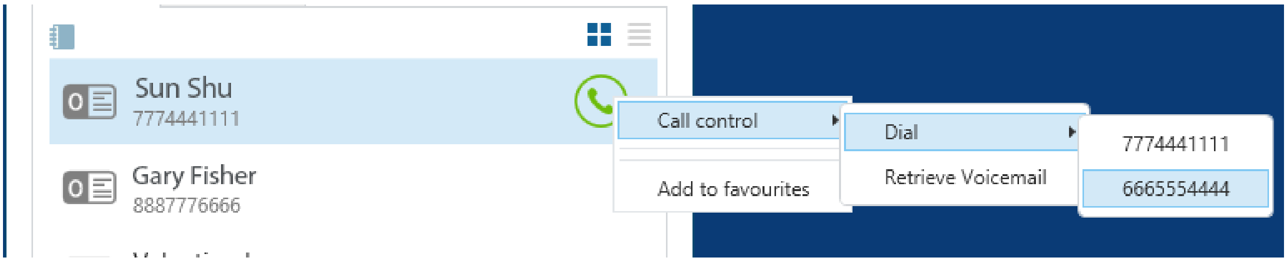
- Directory import for contacts
- Click to dial
- Meet-Me conference creation
- Screen pop for contacts
- Automatic journal entry
- Calendar & DND synchronisation
- Business Contact Manager for Outlook

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.

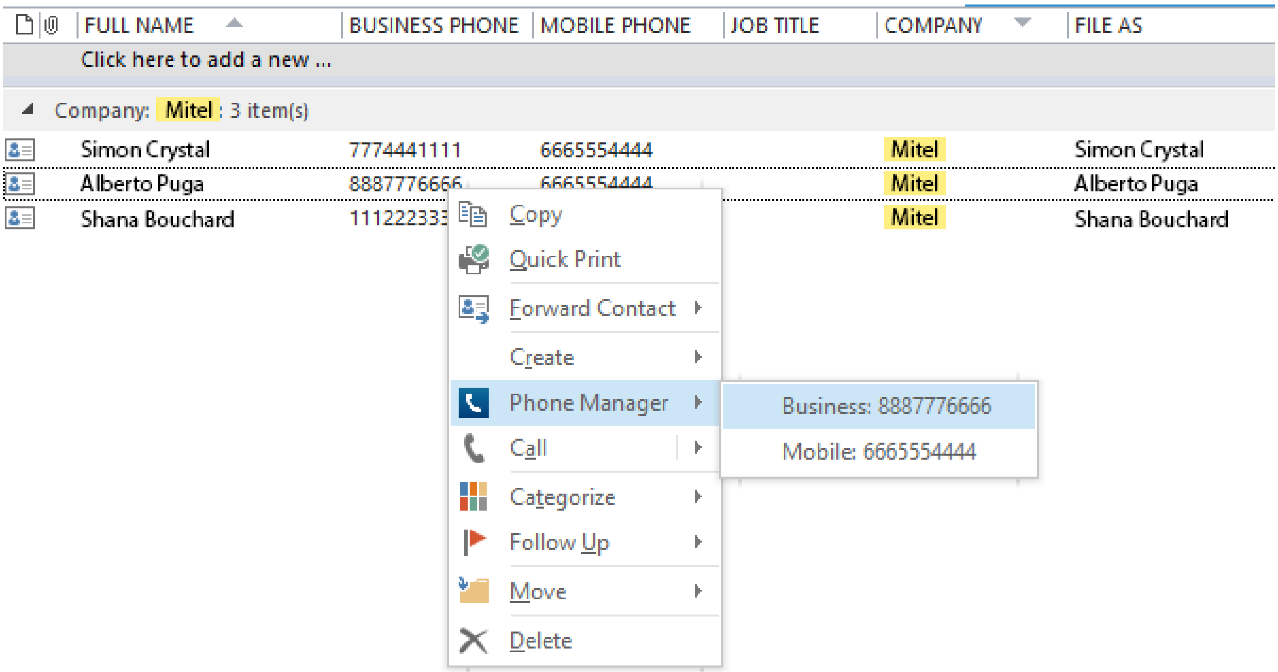


Frequently accessed contacts can be pinned to the Users favourites directory, by right clicking on the contact entry and selecting *Add to favourites*, so that they permanently appear on the contacts tab.

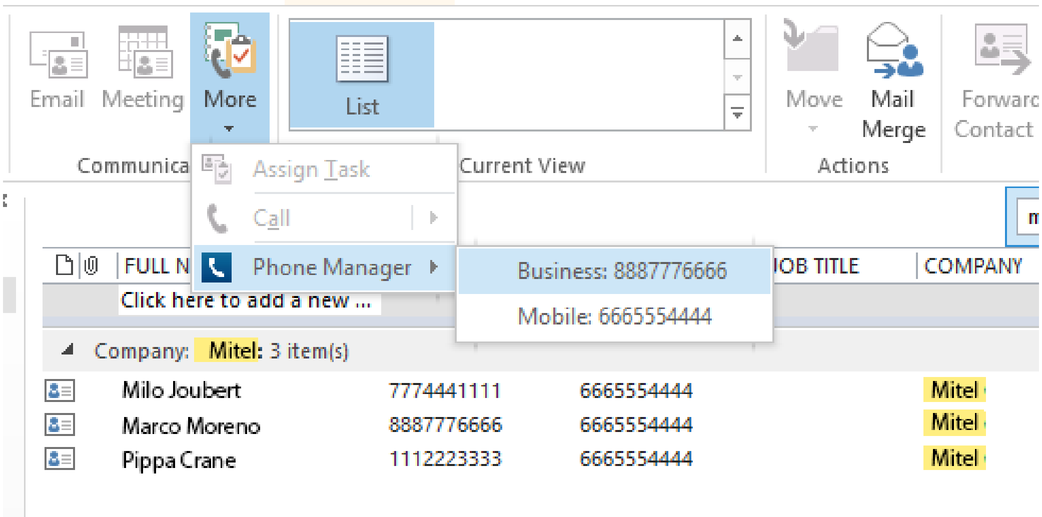
⚠ Only contacts in the users personal folder are available for directory searching and adding to favourites.

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.



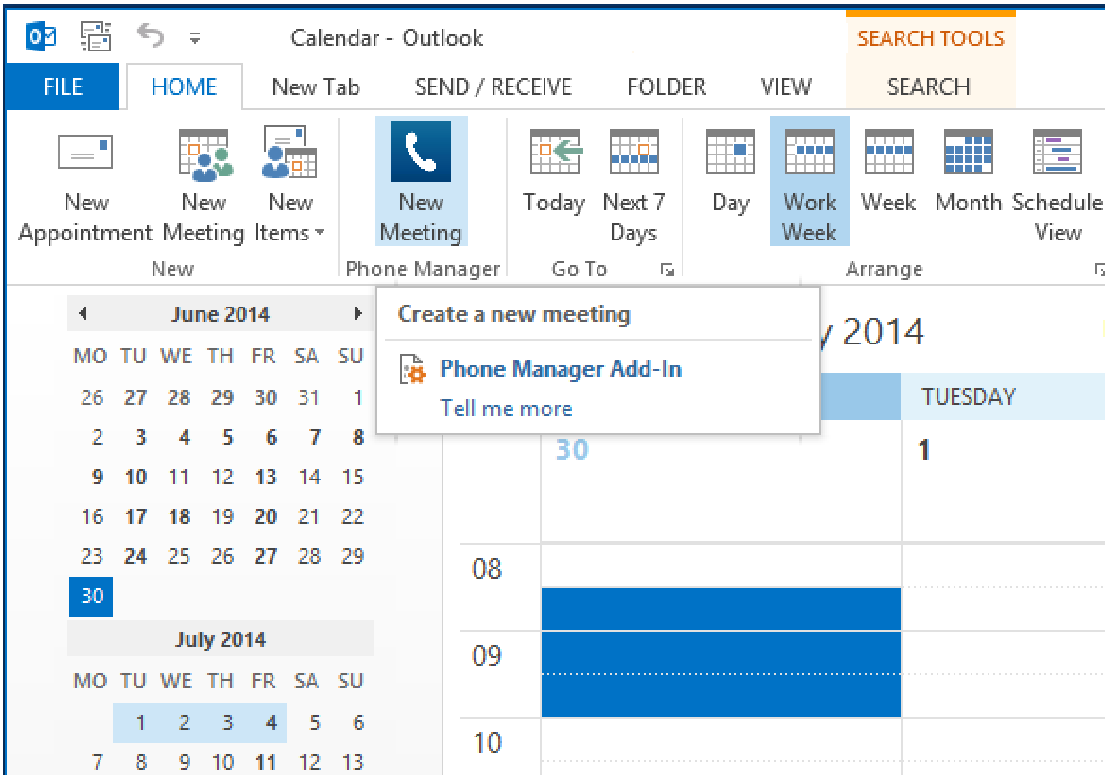
When in the contact list or contact details view at the top the ribbon bar can also be used. From the *Communicate* ribbon, select *More* and then *Phone Manager*.



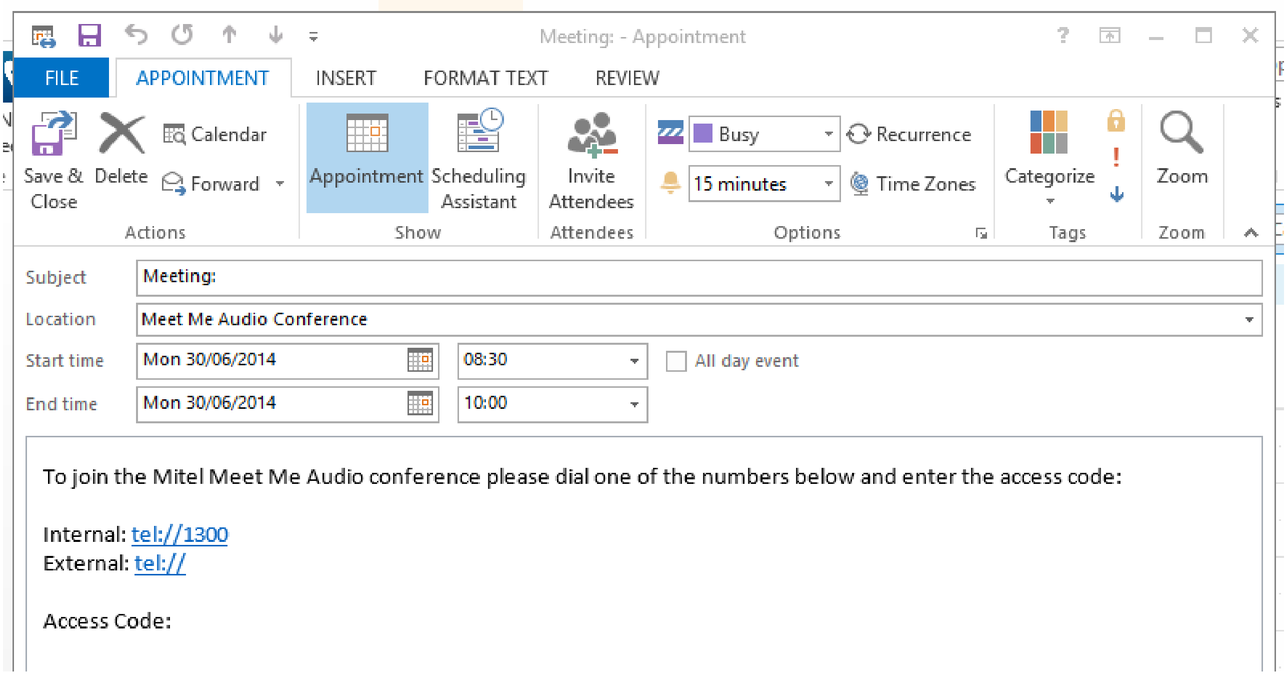
This requires Phone Manager to be running in the same Windows session as Outlook©.

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©.

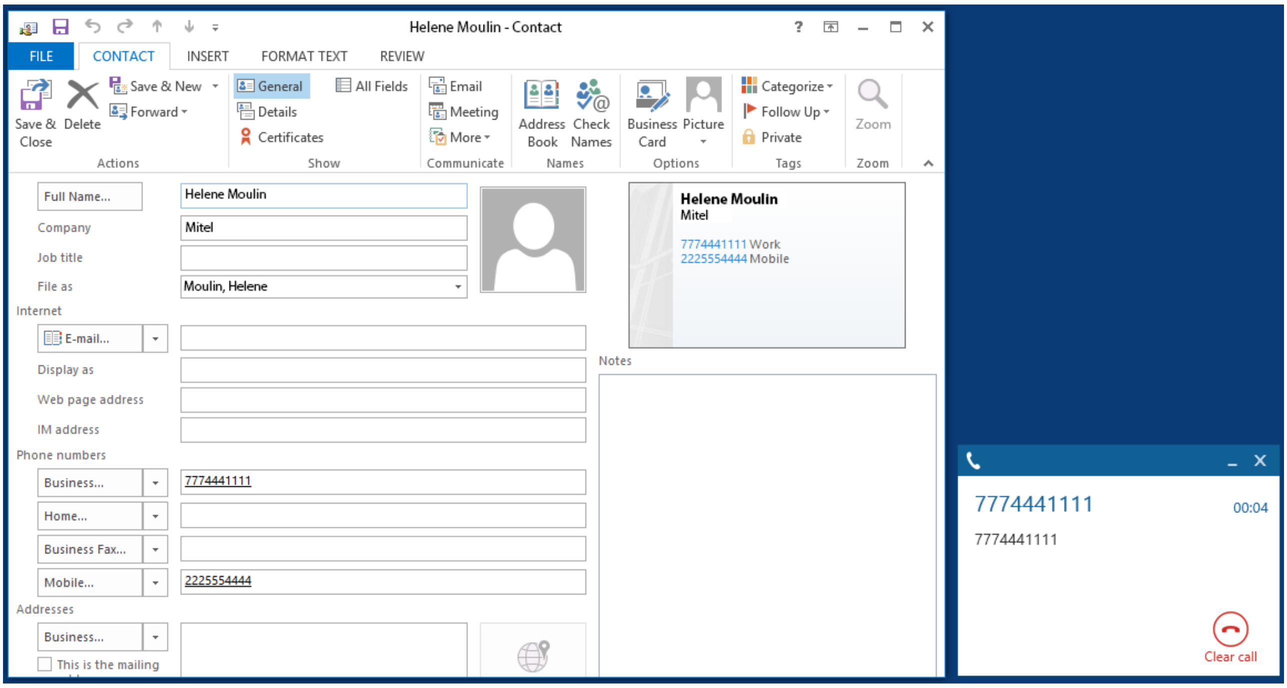


When selected, a new appointment is displayed that is pre populated with the telephone number and access code to dial into a Meet-Me conference.

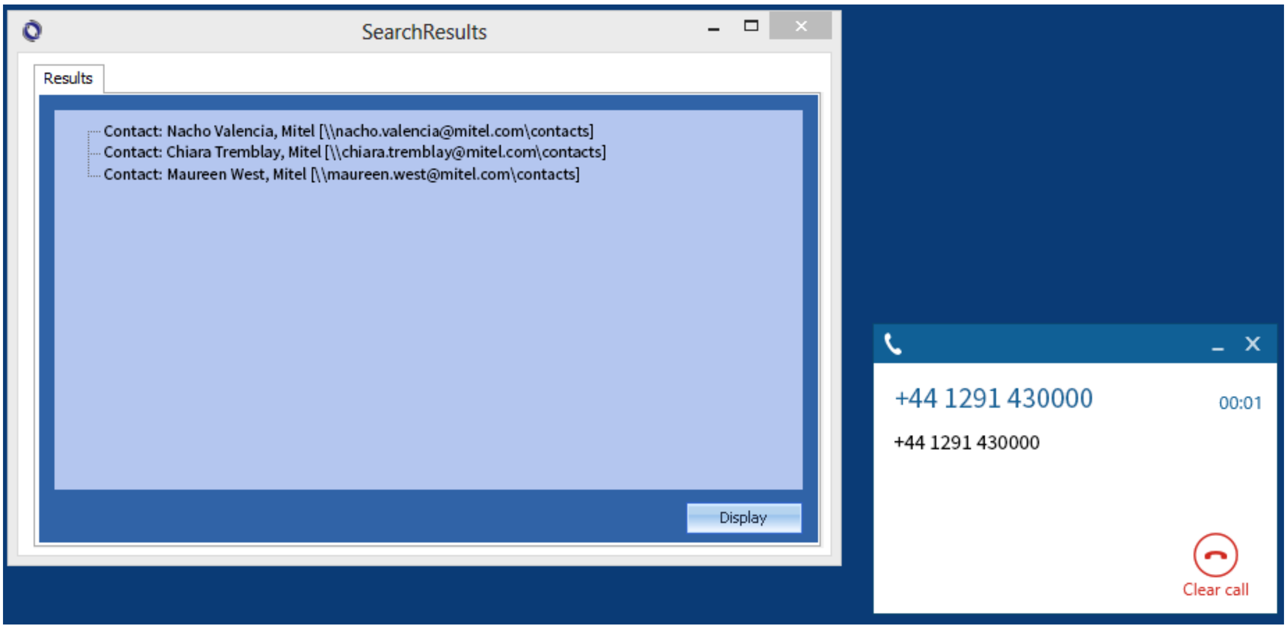


Screen pop for contacts

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

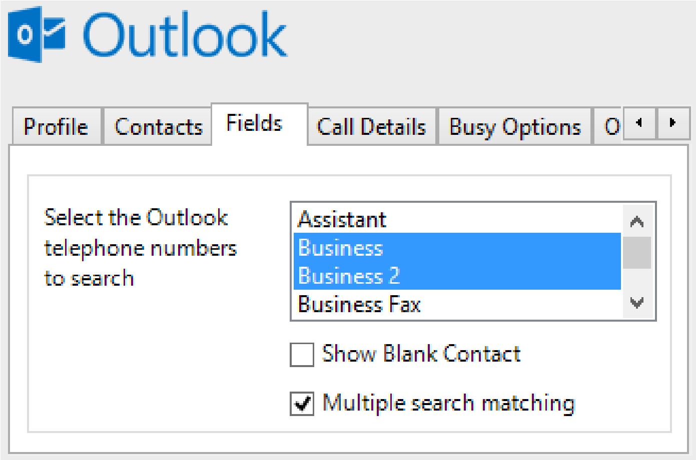
The Users local Outlook© contact folder is used when trying to find any matching contacts (**Default)**. Additional Outlook© Public folders can be added to the search from the *Contacts* tab in the configuration.

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.



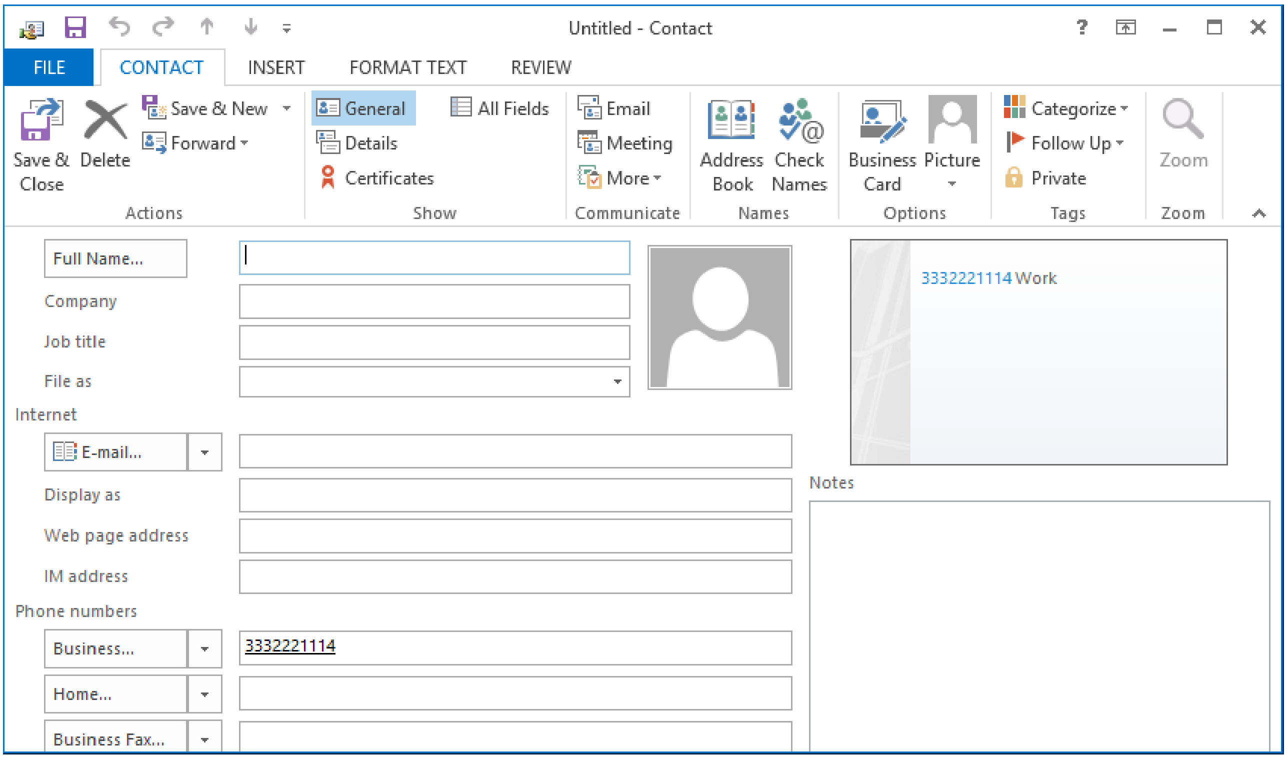
The list shows all of the available telephone number fields and if they are enabled for searched by default. These are the default field names and descriptions and may be different from the ones shown in Outlook©.

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:

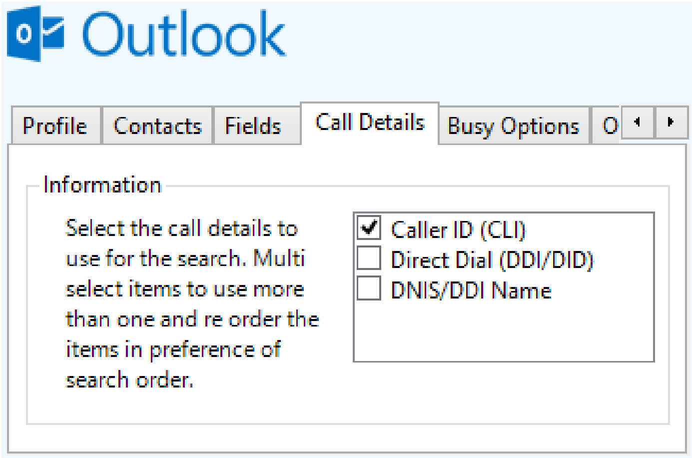
UK & International Telephone Formats			
08001831234	+44 (0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234
0800 1831234	0800-1831234	(0800)1831234	(0800)-1831234
(080)018-31234	0800 183 1234		

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		

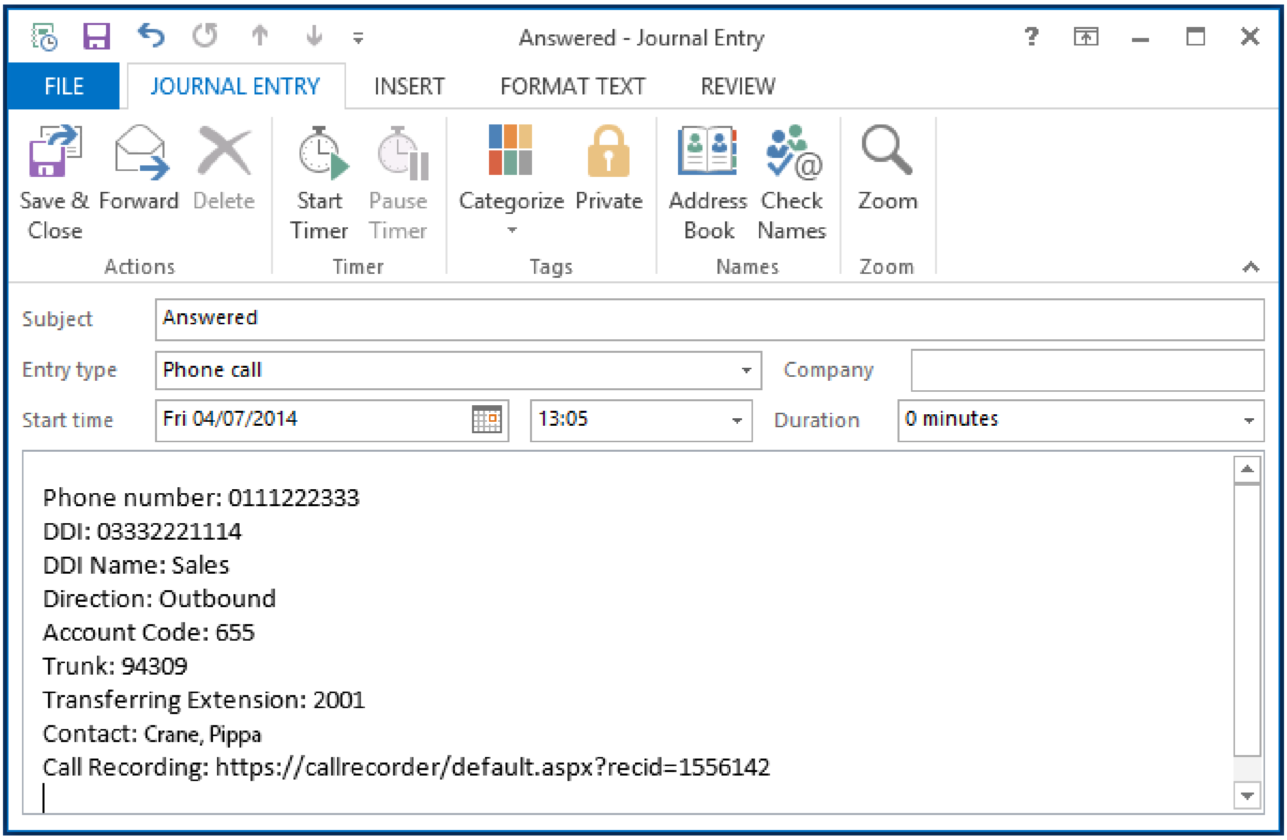
Call details

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.

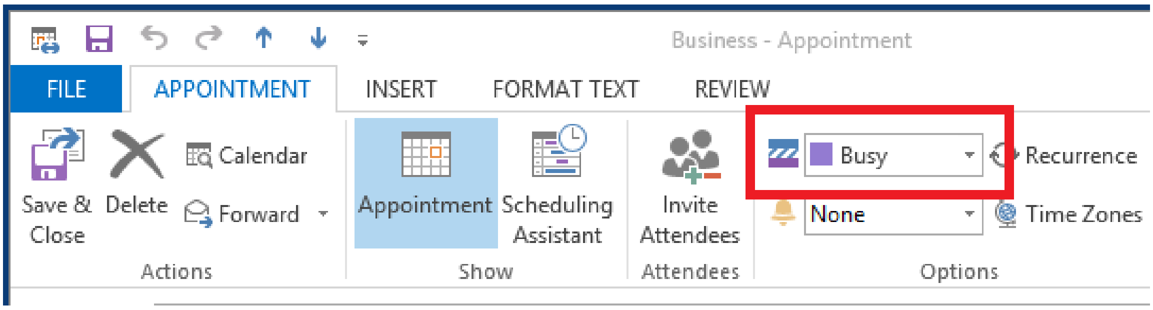
Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction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

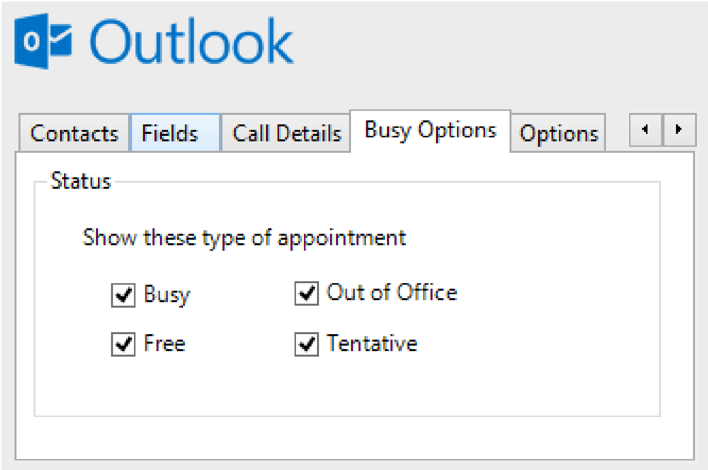
The calendar within Outlook© can be synchronised with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the subject of the appointment. When the appointment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

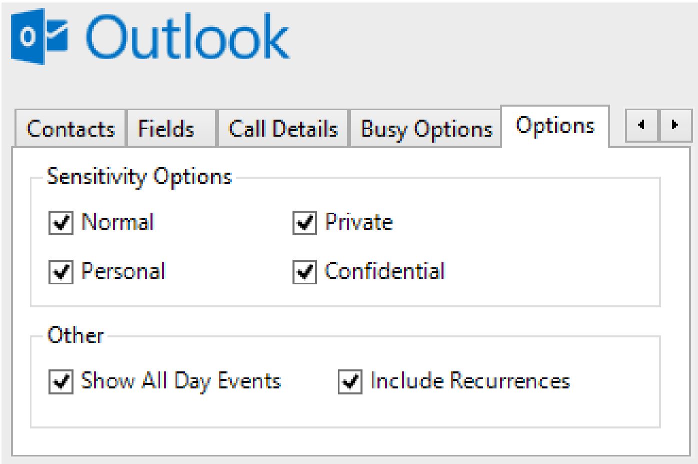


From the *Busy Options* tab check each entry to include this type of busy status.



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.

7.7.5 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)	✓	✓	✓

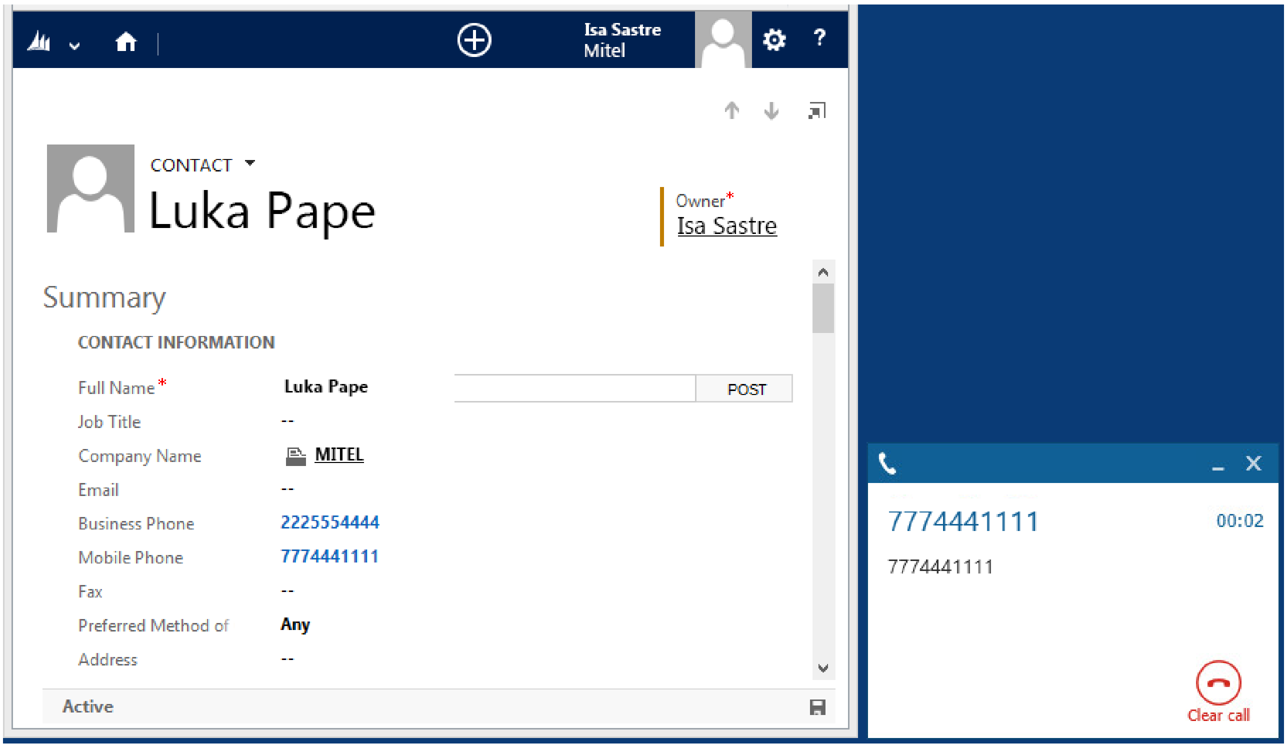
Features

Integration with Microsoft Dynamics CRM supports the features listed below:

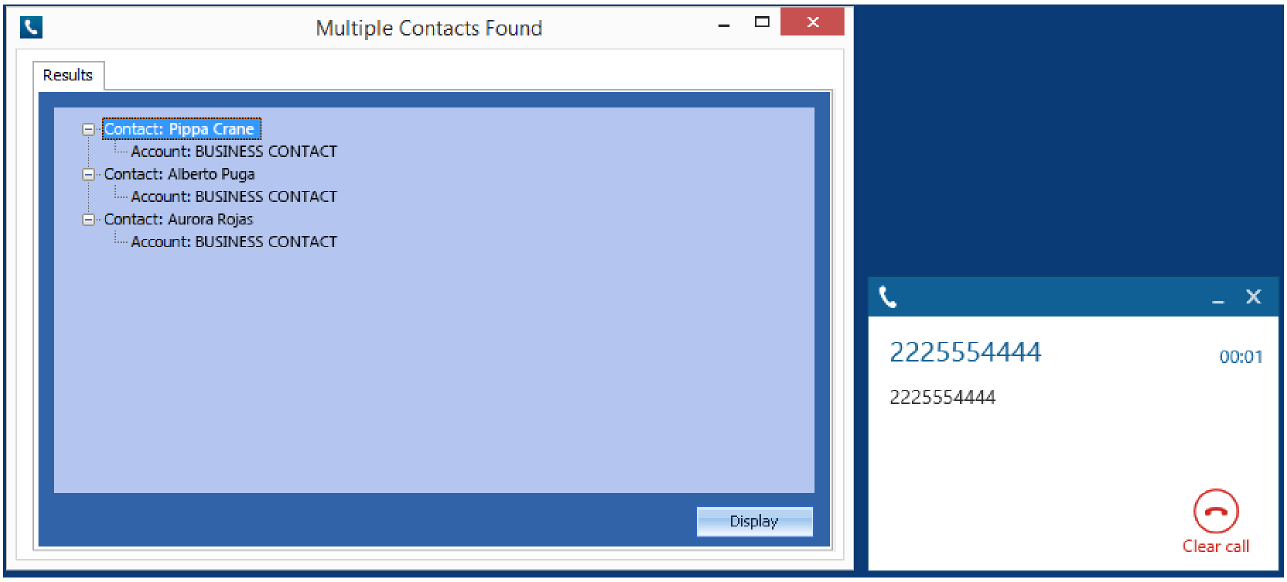
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

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.

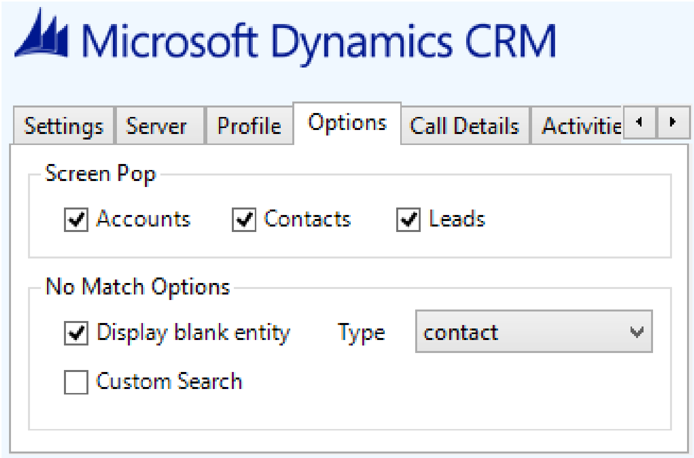


The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

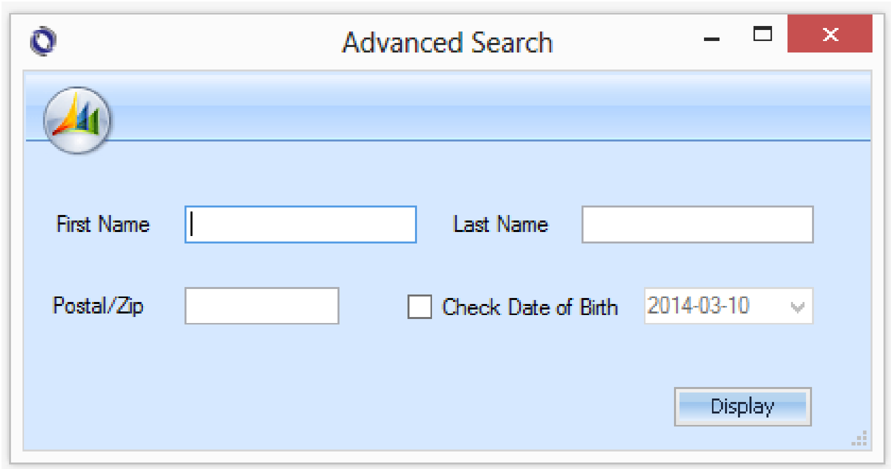
> The plugin will only search for *Accounts* and *Contacts* that are in the *Active* state. If any records have been *Deactivated* then they will not be displayed.

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



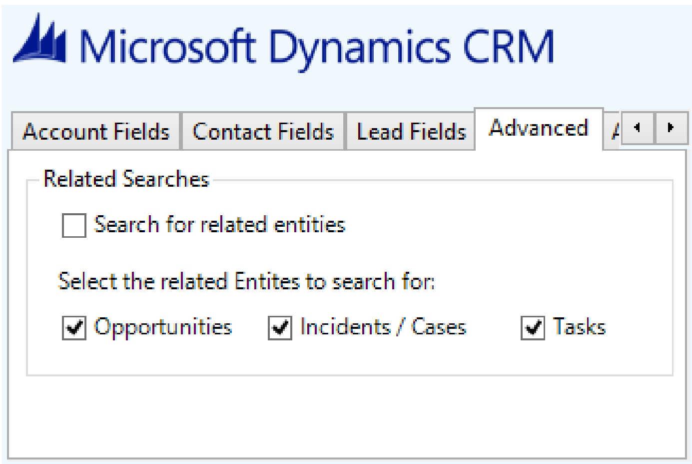
If no match is found then the *Custom Search* option can be selected and this will display a form to allow the user to enter the first name, last name, date of birth or post code and these values will then be used to try and find any matching records.



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

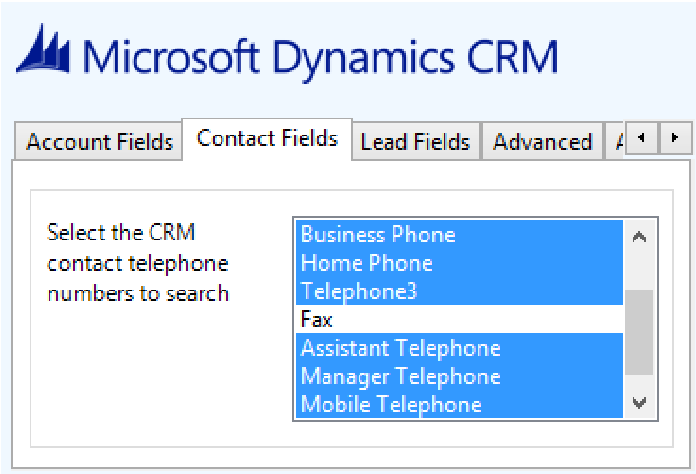
The *Advanced* tab allows control over if related Entities of a matching *Contact*, *Account* or *Lead* are shown in the *Multiple Contacts Found* window.



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.

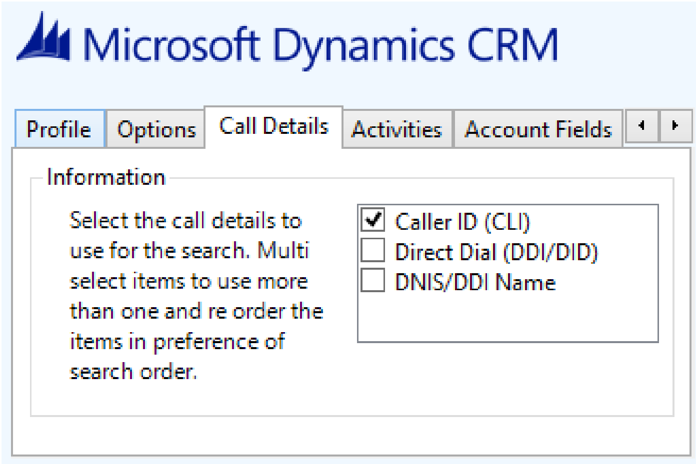
UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

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.

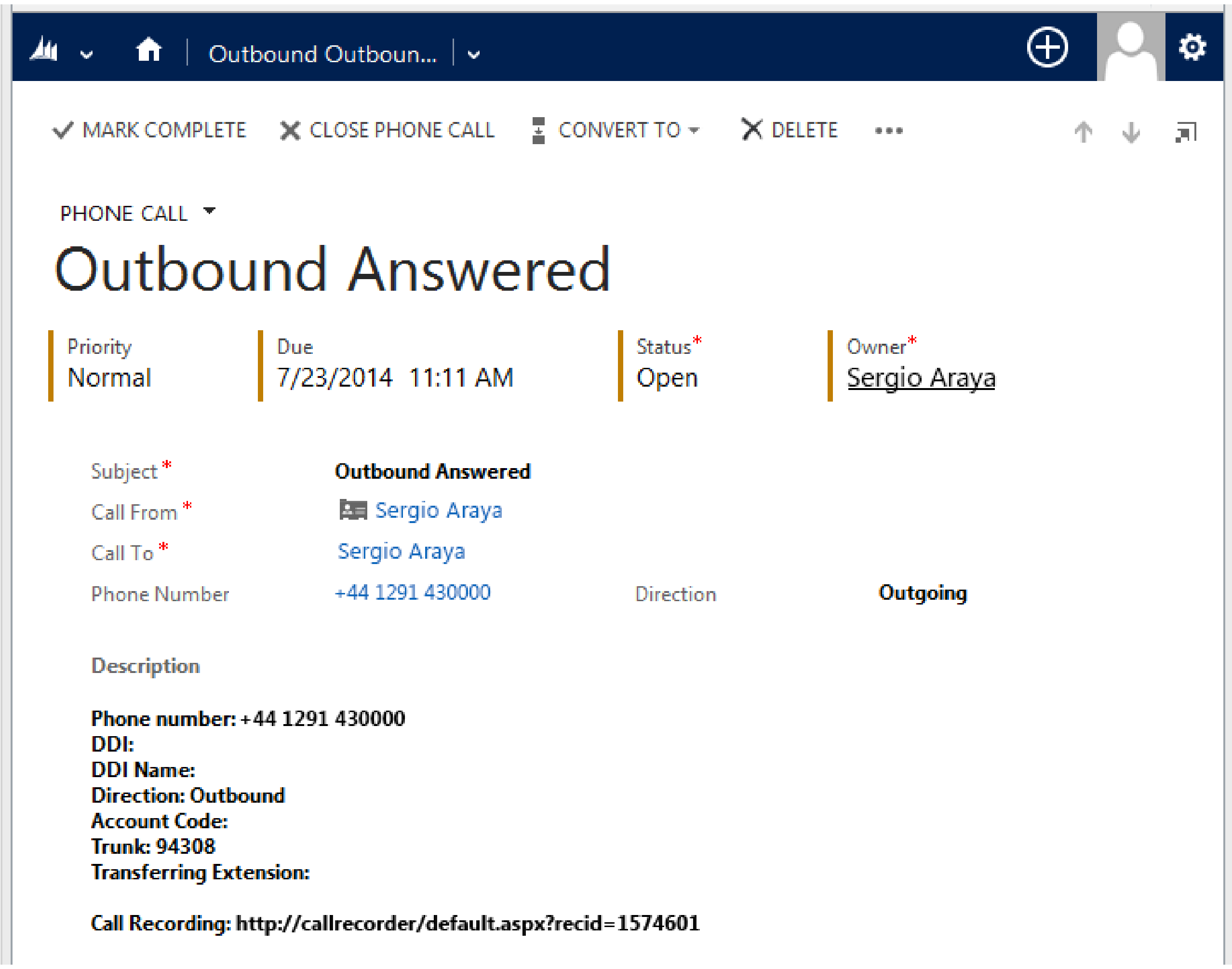
The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

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

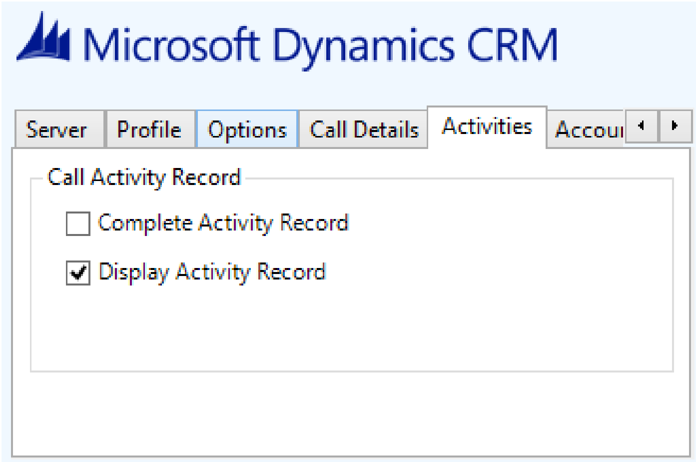
The plugin supports the ability to be able to automatically create and display a Microsoft Dynamics CRM Phone Call Activity entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window 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.



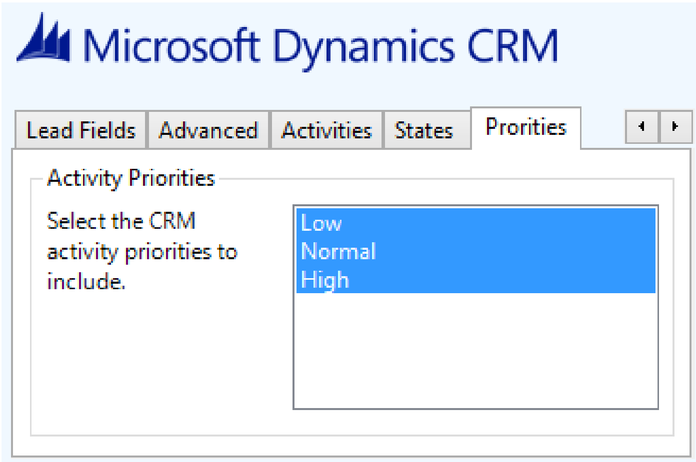
Complete Activity Record: This will set the status of the Activity to be Completed.

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.

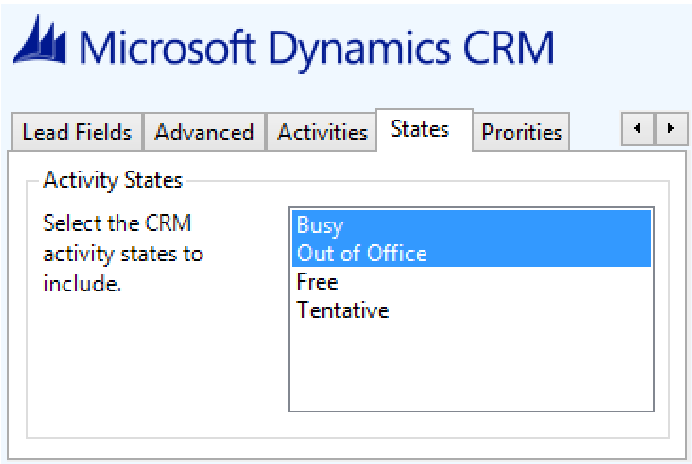
Calendar & DND synchronisation

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.

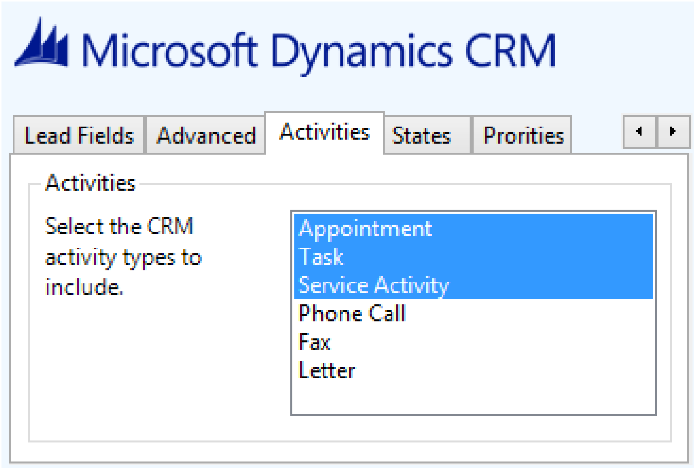
There are several options to be able to control the types of Activities that cause the extension to go into DND. The *Priorities* tab allows Activities with a specific priority to be included or excluded.



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.

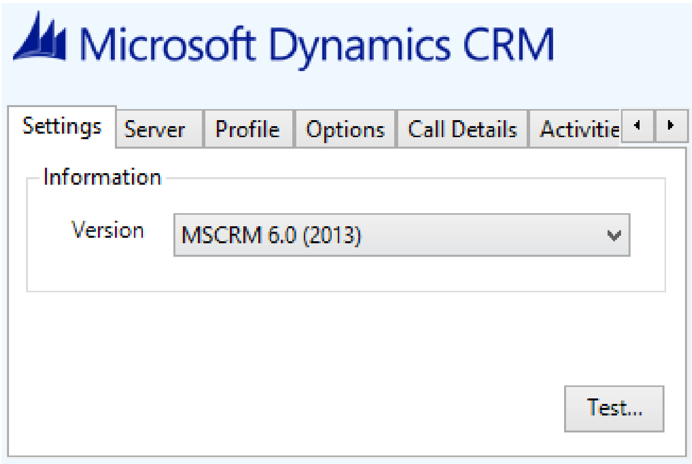


Configuration

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.

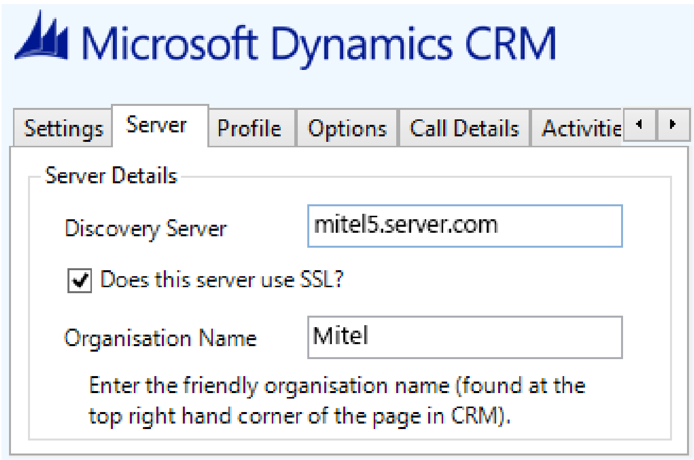
Settings and versions

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.

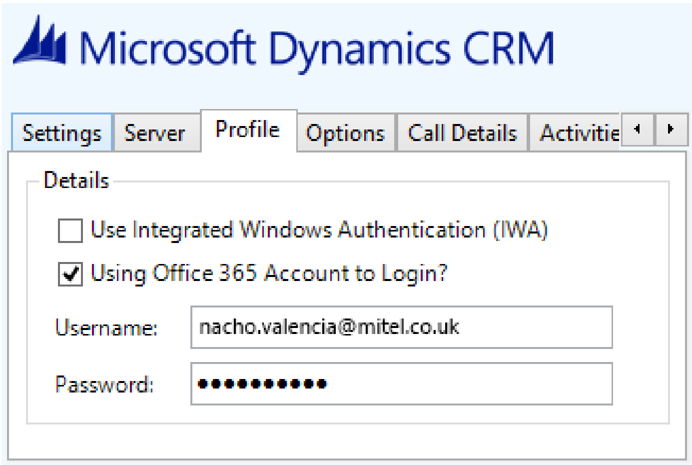
Location	Discovery Server
North America	crm.dynamics.com
North America 2	crm9.dynamics.com
Europe, Middle East and Africa (EMEA)	crm4.dynamics.com
Asia Pacific Area (APAC)	crm5.dynamics.com
Oceania	crm6.dynamics.com
Japan (JPN)	crm7.dynamics.com
South America	crm2.dynamics.com

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.

7.7.6 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

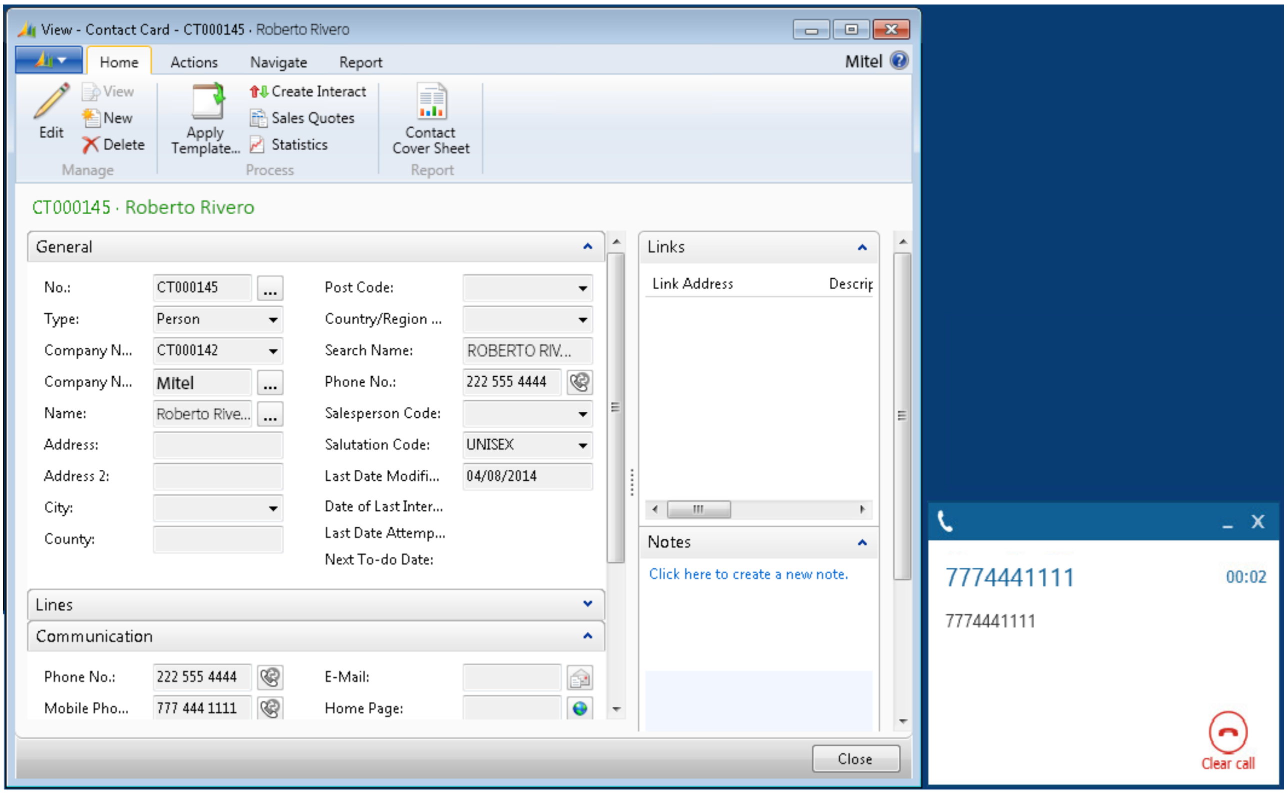
Integration with Microsoft Dynamics NAV supports the features listed below:

- Screen pop

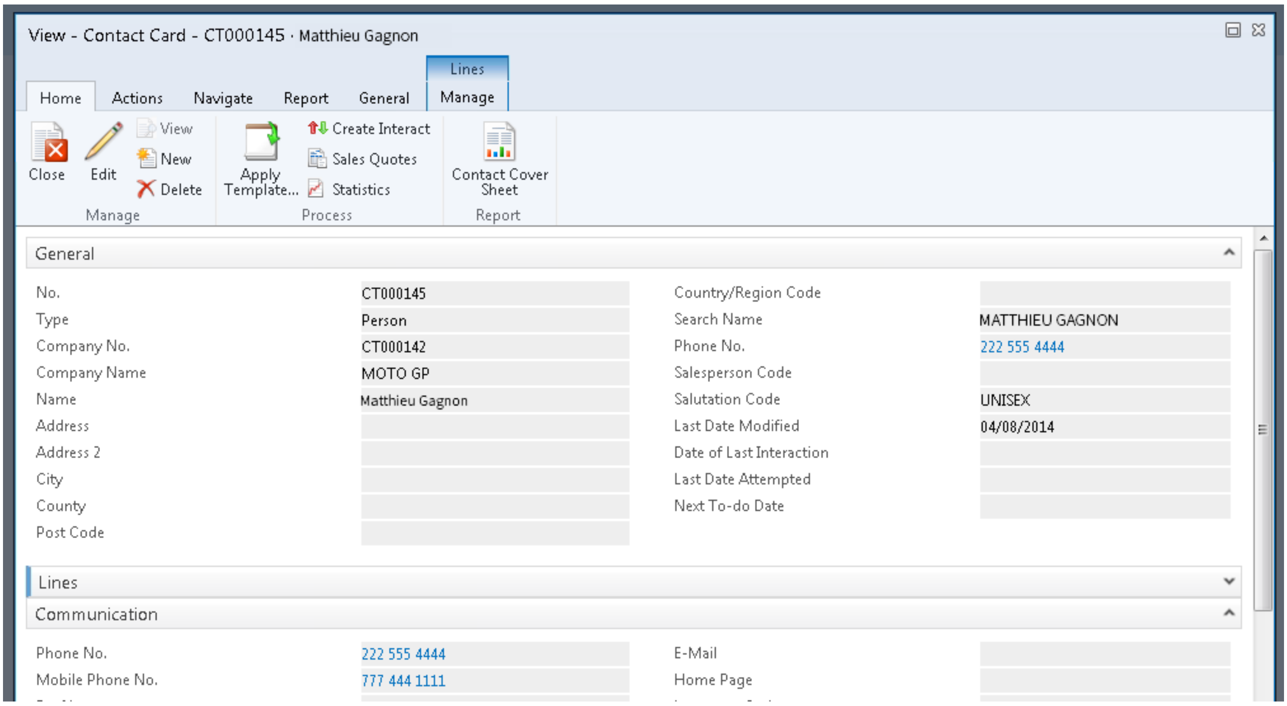
Screen pop

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.

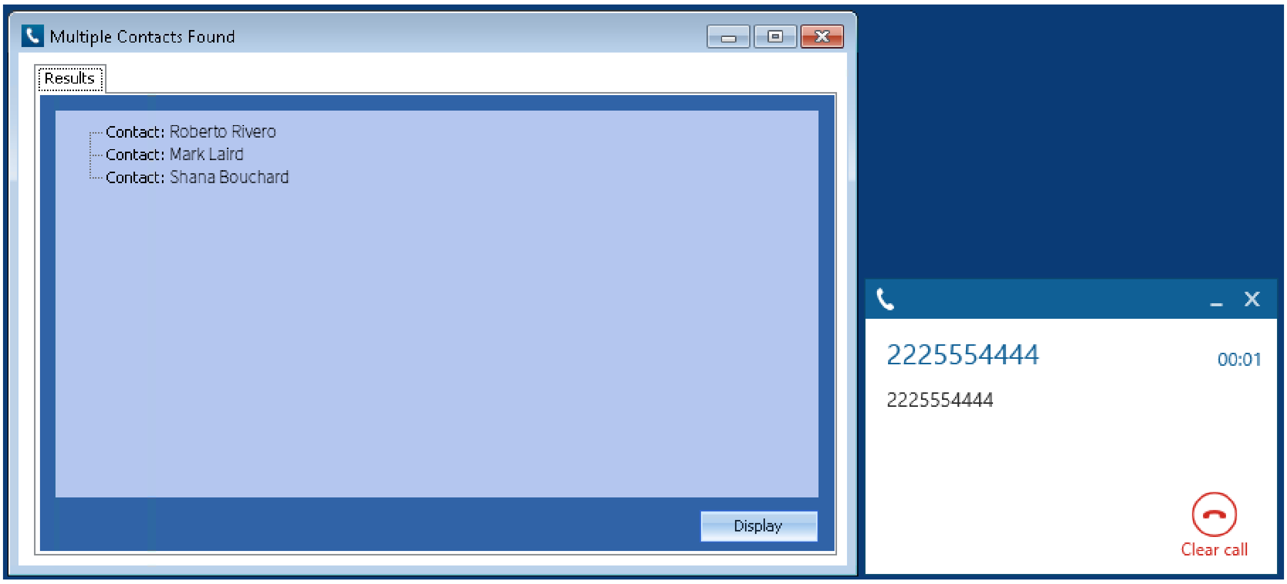
This example shows the RoleTailored Client.



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.

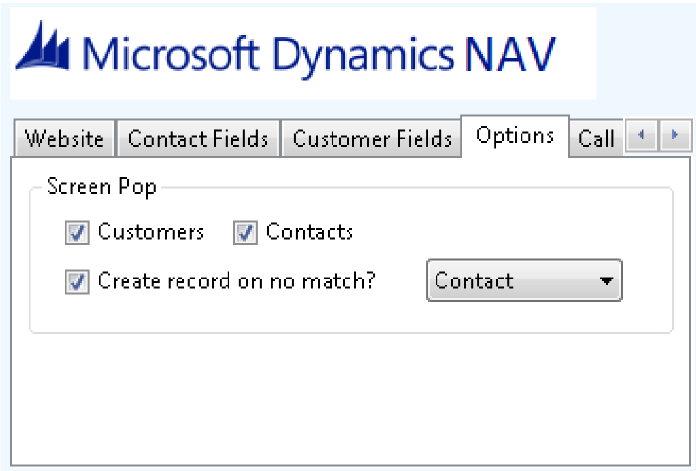


The correct entry can then be highlighted and then clicking on the *Display* button will open this card.

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.

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

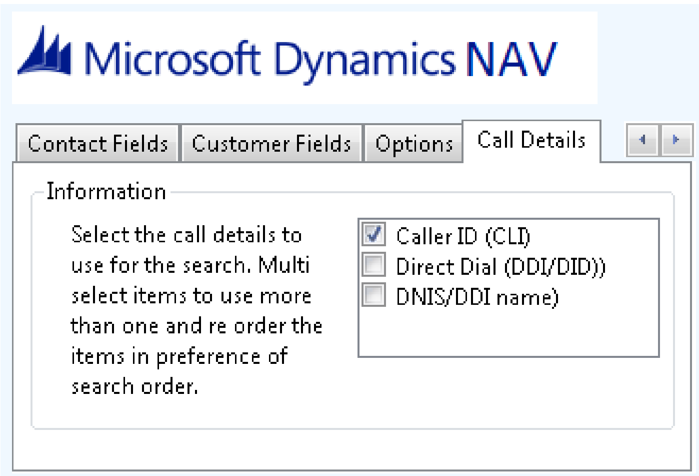
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

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.

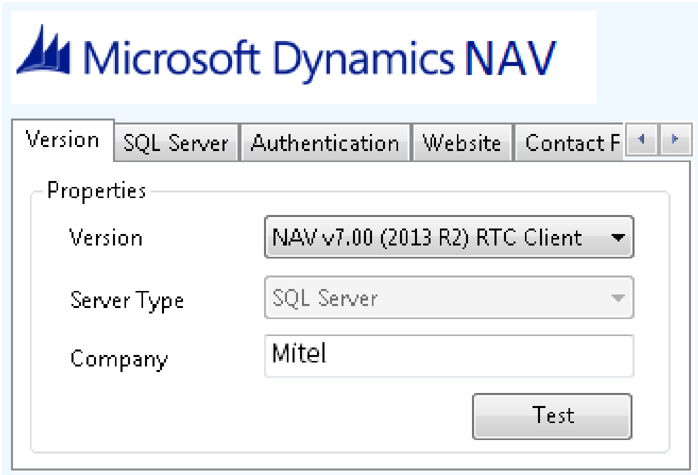
The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

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

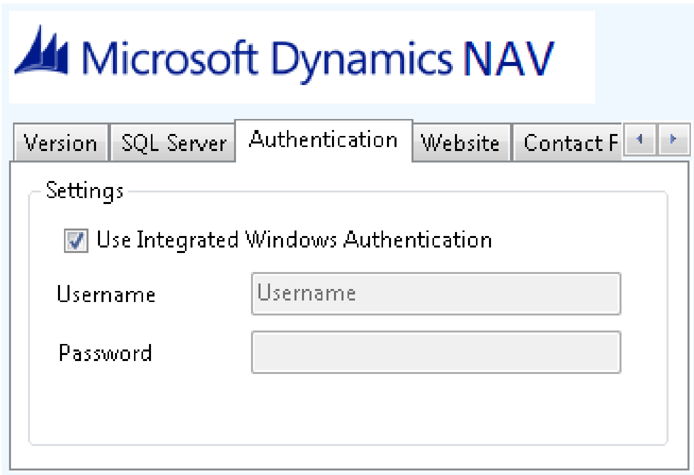
The integration needs to be configured for the correct version of Microsoft Dynamics NAV that is running.



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

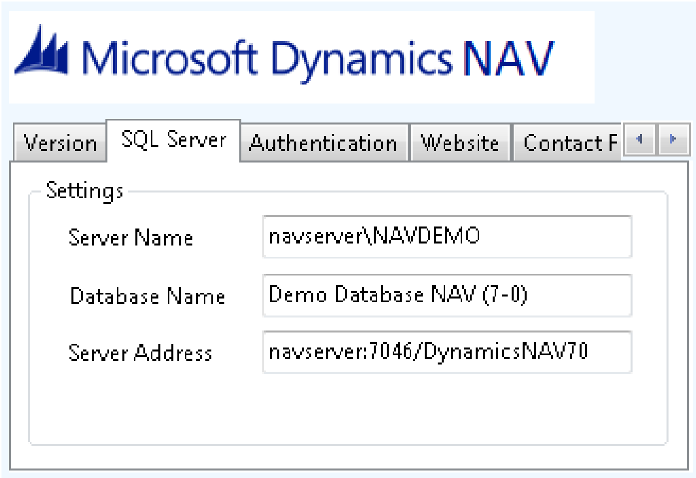
The *Authentication* tab enables the security credentials used to access Microsoft Dynamics NAV to be configured. Select the *Use Integrated Windows Authentication* option if the username, password and domain details from user who is logged on the computer will be used.



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.

SQL Server connection

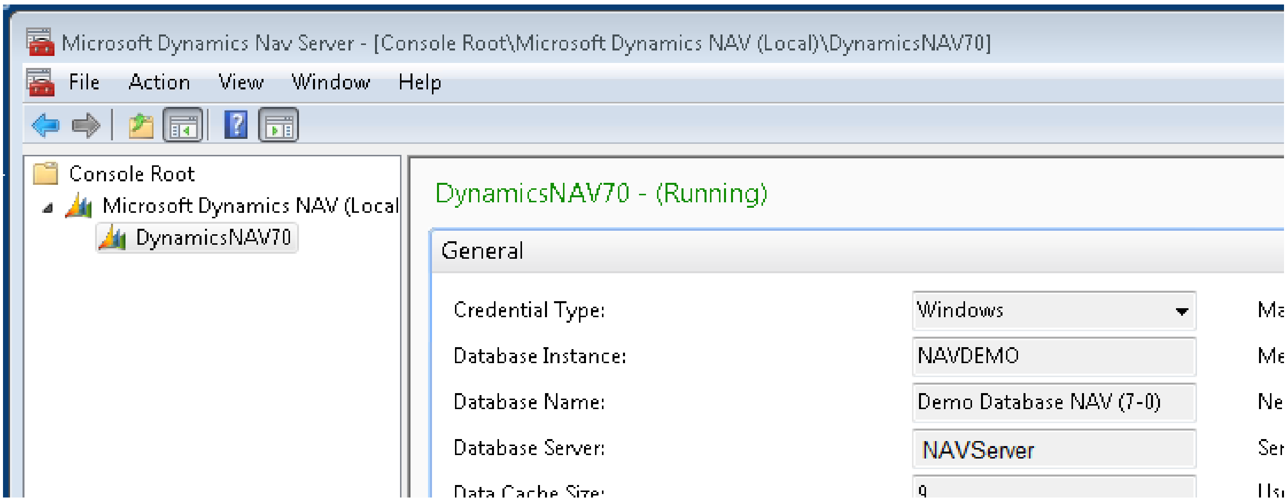
If the *Server Type* has been configured as *SQL Server* then the connection details for the SQL Server needs to be entered.



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

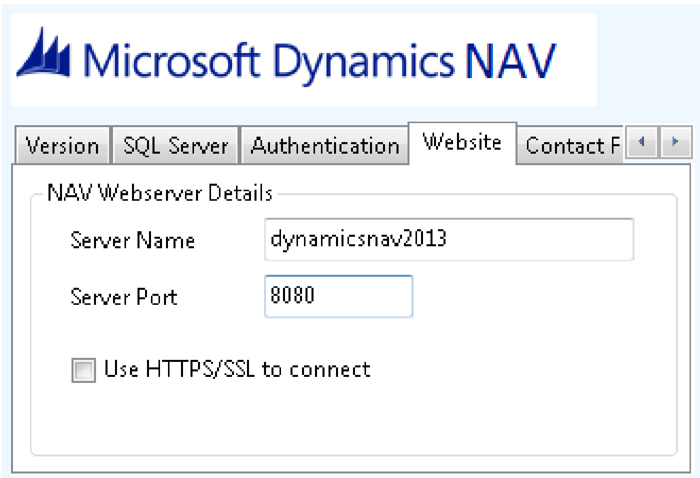
This will connect to the *NAVDEMO* database instance on the server with the hostname of *navserver*. This correct value for this can be found using the *Microsoft Dynamics NAV Administration* tool.



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.

7.7.7 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

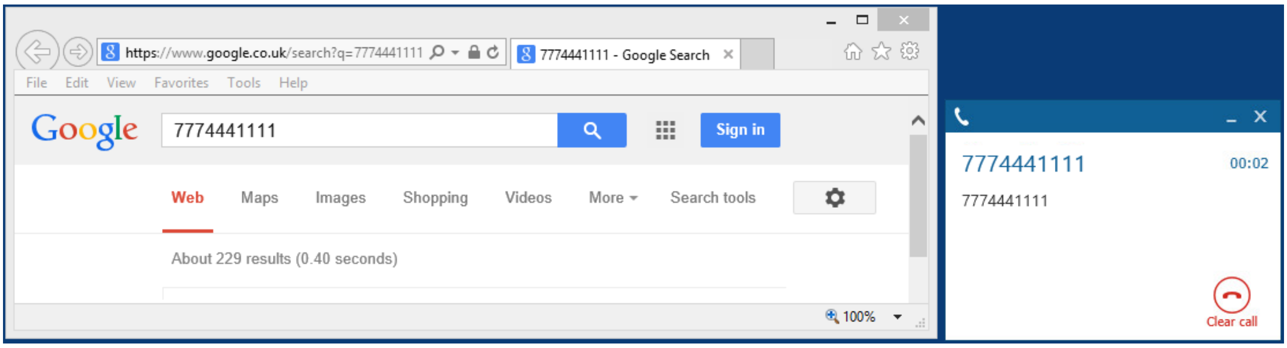
Features

Integration with Microsoft Internet Explorer supports the features listed below:

- Screen pop

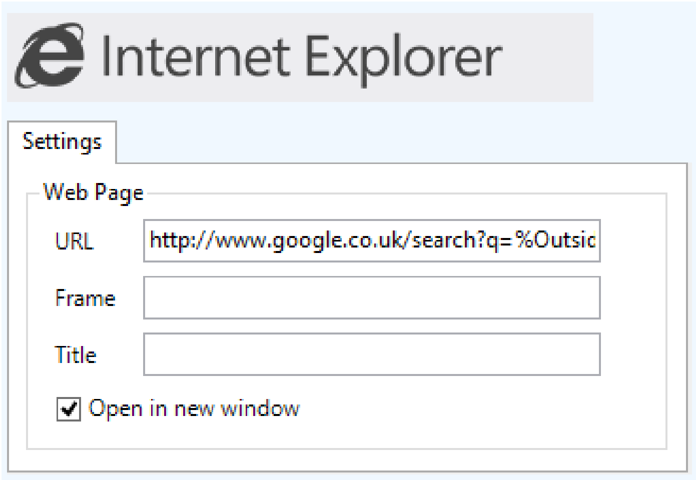
Screen pop

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 Campaign Manager campaign if this is a dialler call.
DiallerField1	The Campaign Manager dialler field 1 for this campaign record if this is a dialler call.
DiallerField2	The Campaign Manager dialler field 2 for this campaign record if this is a dialler call.
DiallerField3	The Campaign Manager dialler field 3 for this campaign record if this is a dialler call.
DiallerField4	The Campaign Manager dialler field 4 for this campaign record if this is a dialler call.
DiallerField5	The Campaign Manager dialler field 5 for this campaign record if this is a dialler call.
DiallerField6	The Campaign Manager dialler field 6 for this campaign record if this is a dialler call.
DiallerField7	The Campaign Manager dialler field 7 for this campaign record if this is a dialler call.
DiallerField8	The Campaign Manager dialler field 8 for this campaign record if this is a dialler call.

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

7.7.8 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.

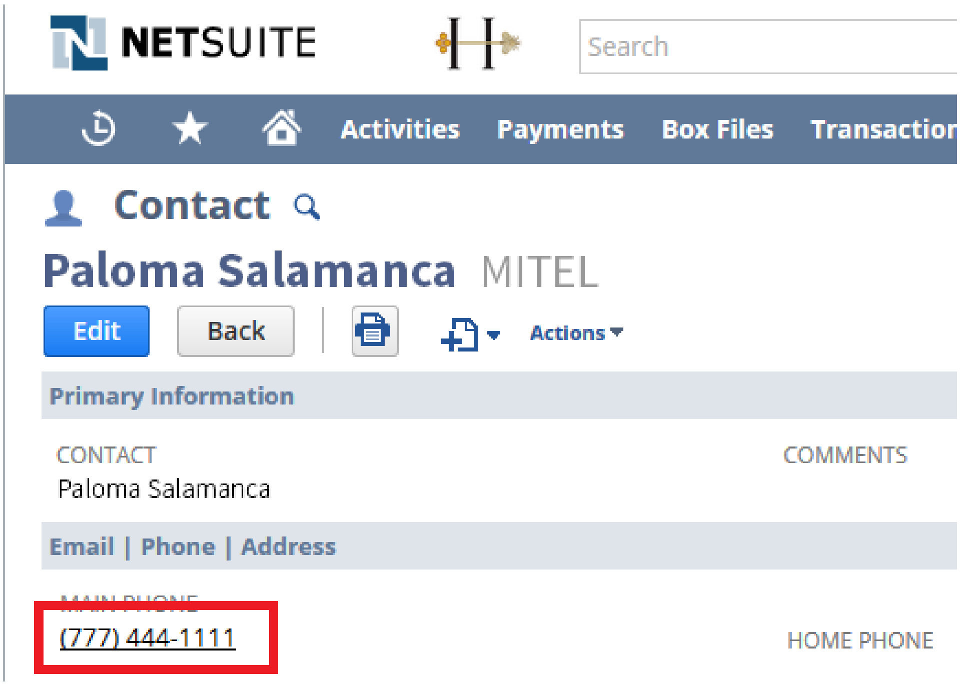
Features

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.



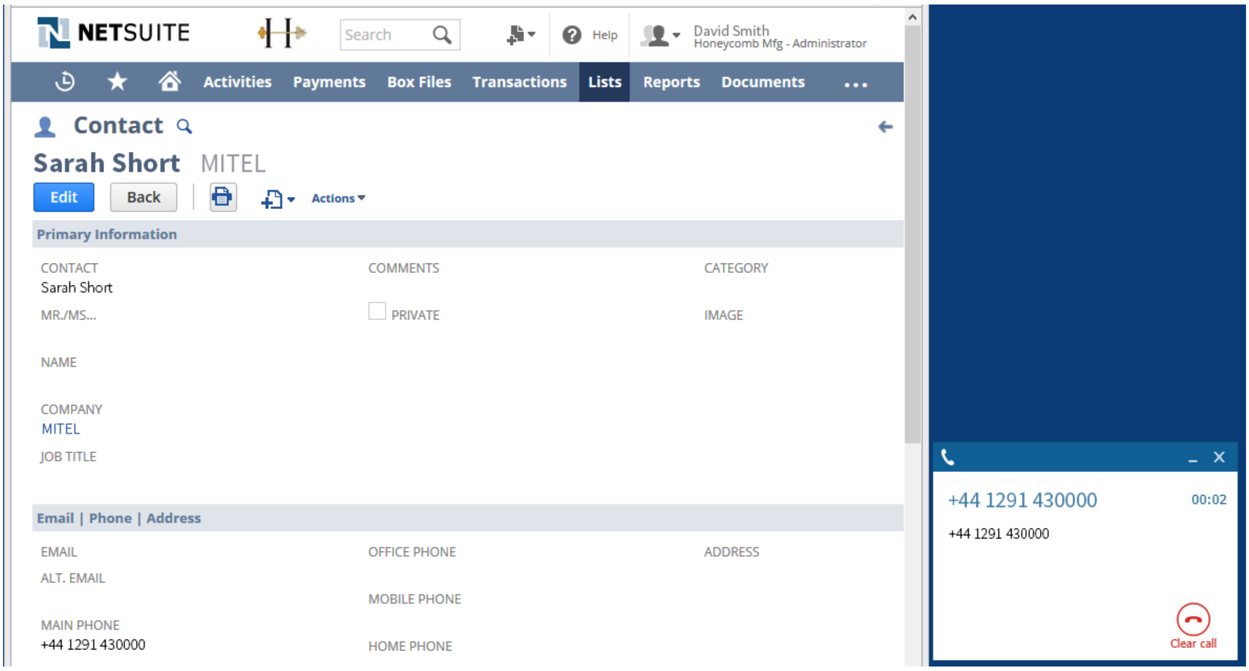
See the Click to dial configuration section for details.

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

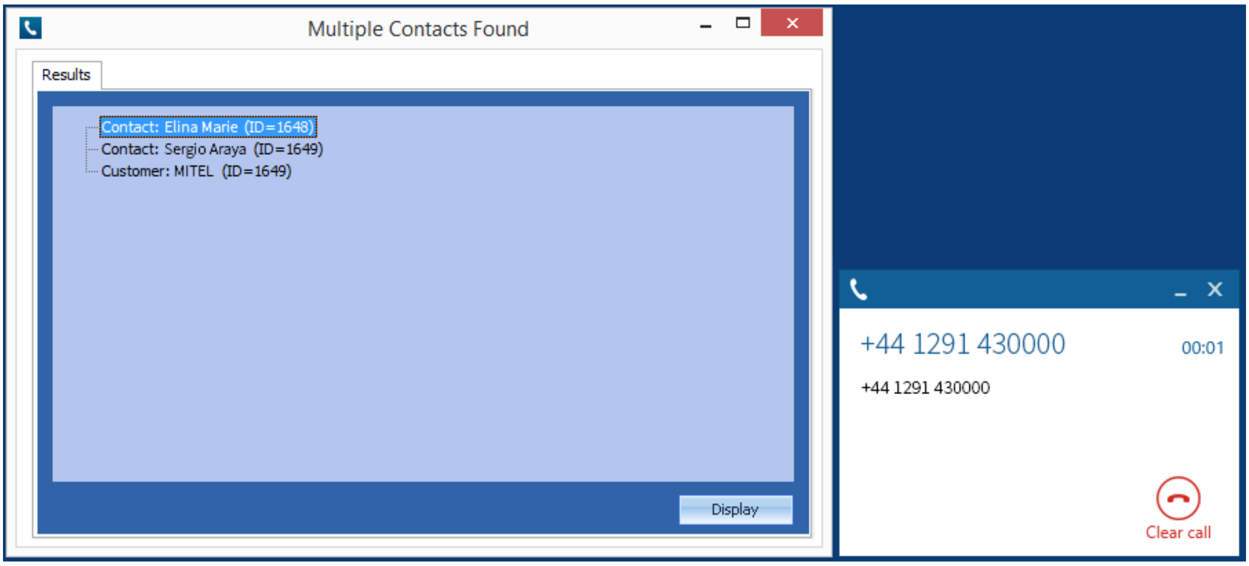
> If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

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.

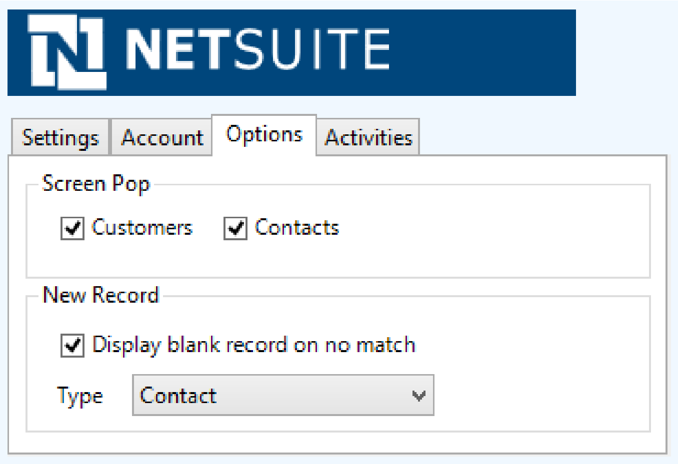


The correct record can then be highlighted and then clicking on the *Display* button or double clicking the entry will open this record.

> 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.

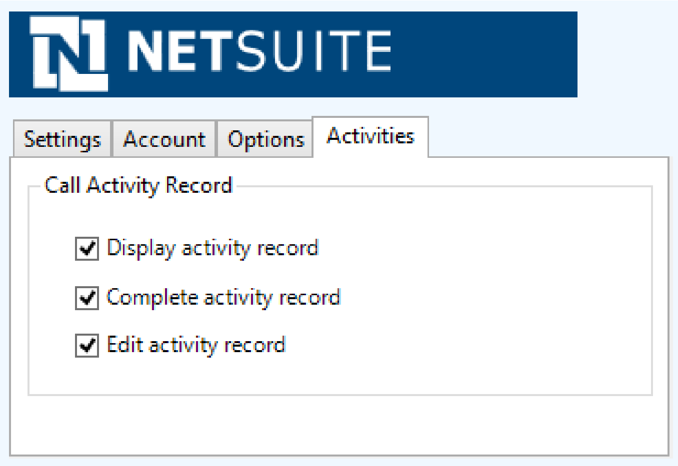
Automatic call history entry

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.

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.

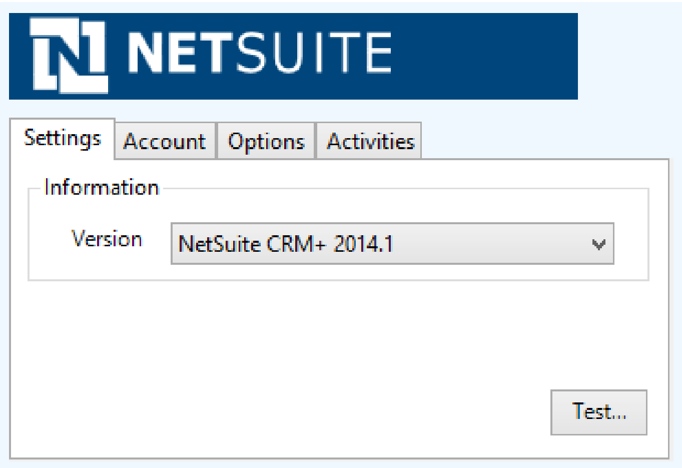
Edit activity record: This will open the *Activity* record in edit mode.

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.

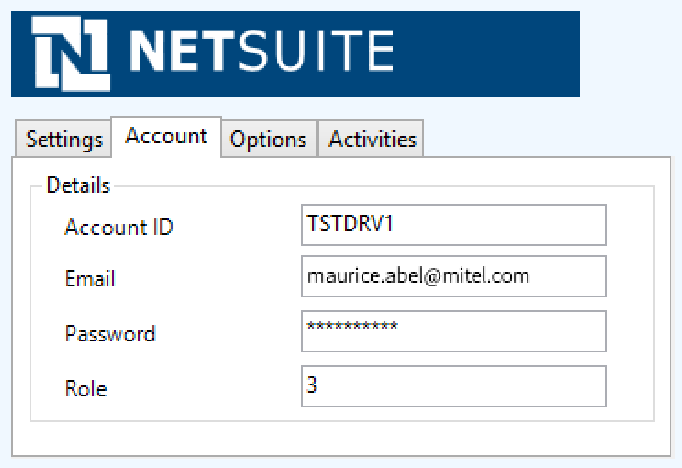
Settings and versions

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

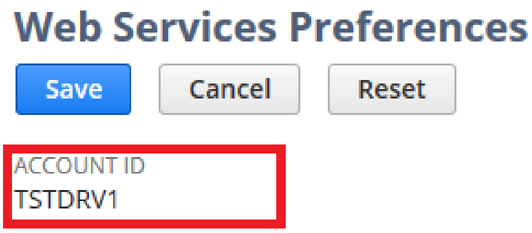


Account details

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.

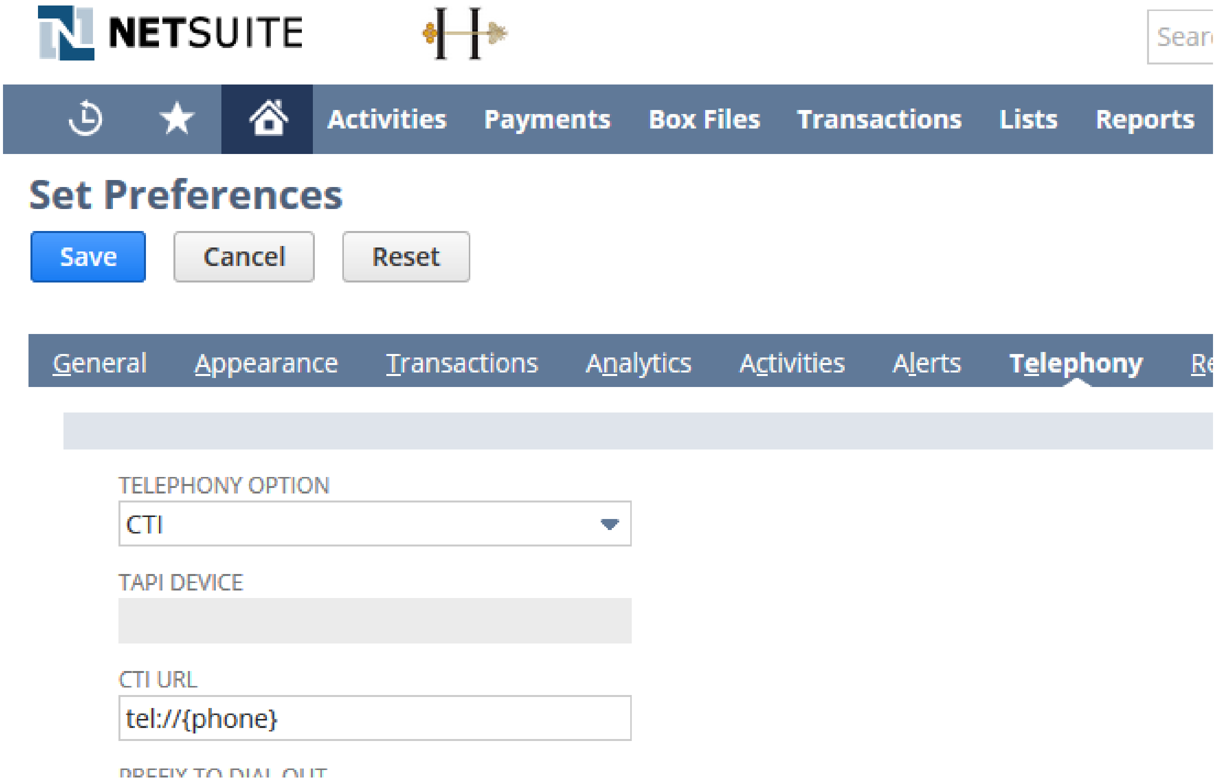
Each User that is connecting to NetSuite needs to have the Web Services permission set against their role. To assign the Web Services permission to a role:

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.


NETSUITE
Activities Payments Box Files Transactions Lists Reports
Set Preferences
Save
Cancel
Reset
General Appearance Transactions Analytics Activities Alerts Telephony
TELEPHONY OPTION
CTI
TAPI DEVICE
CTI URL
tel://{phone}

7.7.9 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	✓

Editions	Supported
Sage CRM Professional Edition (Cloud)	✓
Sage CRM On-Premise Edition	✓
Sage CRM Essentials Edition (Cloud)	✗

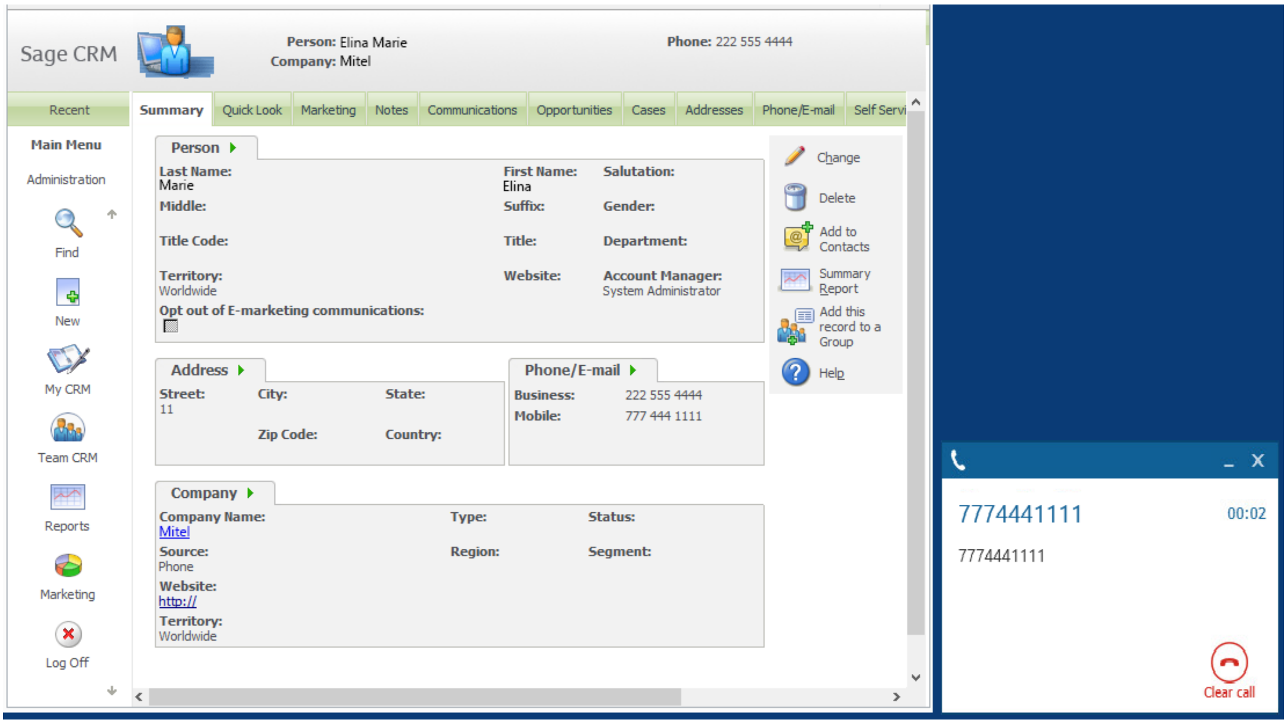
Features

Integration with Sage CRM supports the features listed below:

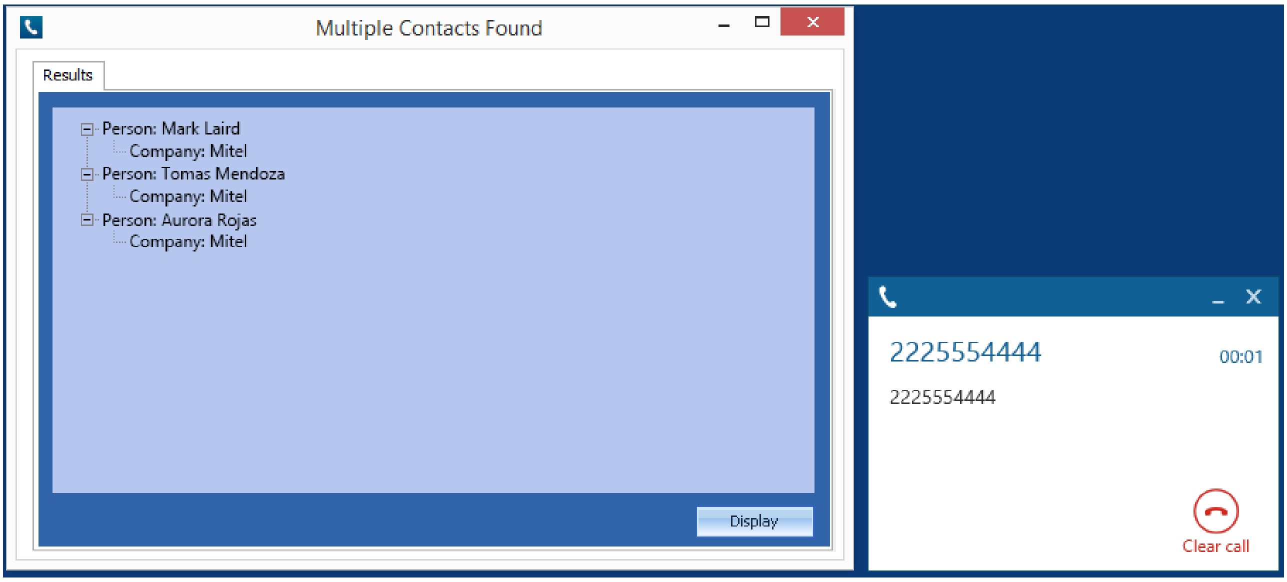
- Screen pop for contacts

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.

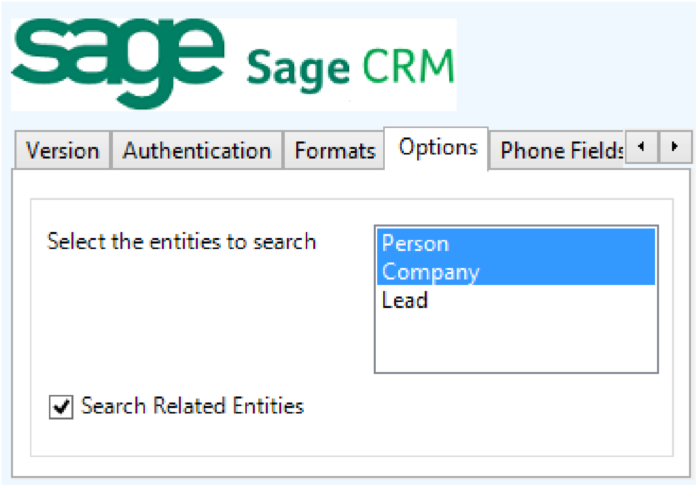


The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

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.

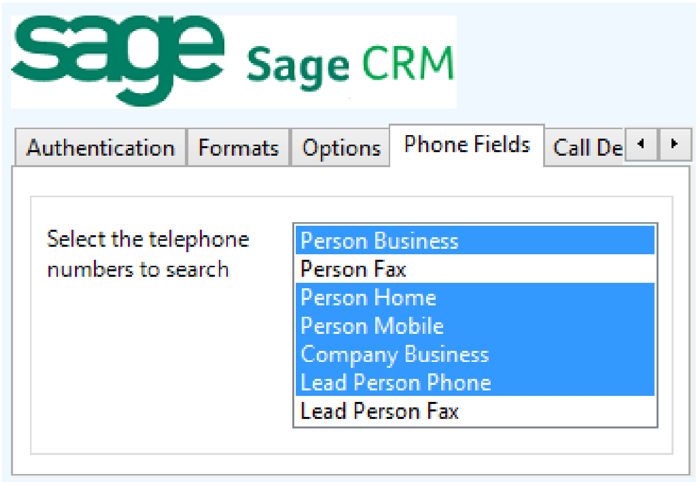
Selecting the *Search Related Entities* option will enable any matching records that have a related entity to be displayed on the *Multiple Contacts Found* window.



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

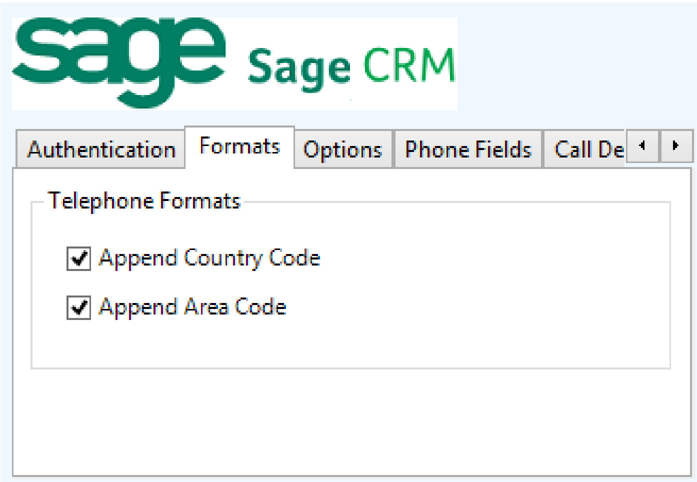
Sage CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is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

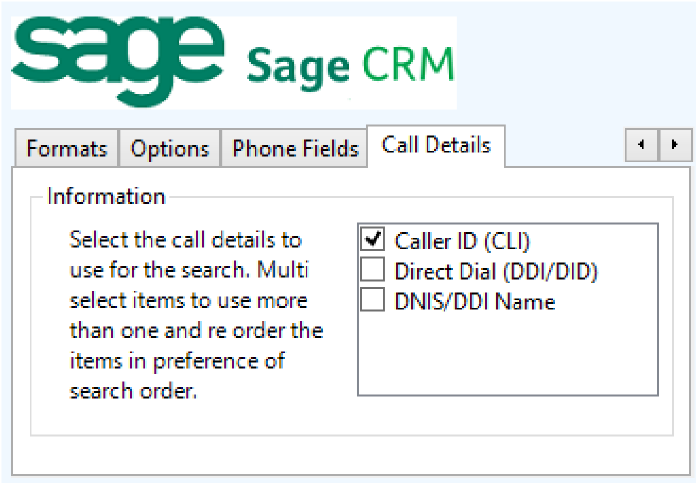
- Country Code: 44
- Area Code: 0161
- Number: 1234567

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.



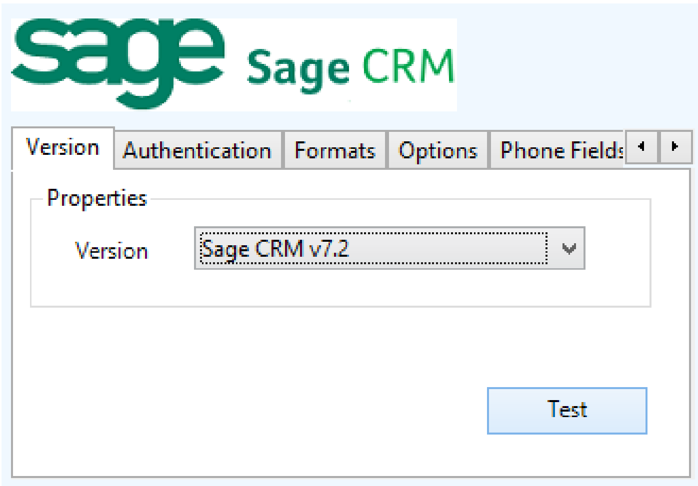
Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

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.

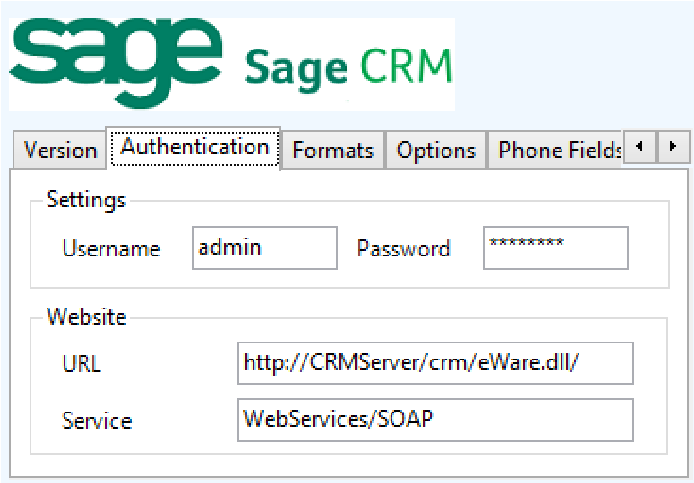
When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

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.

7.7.10 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

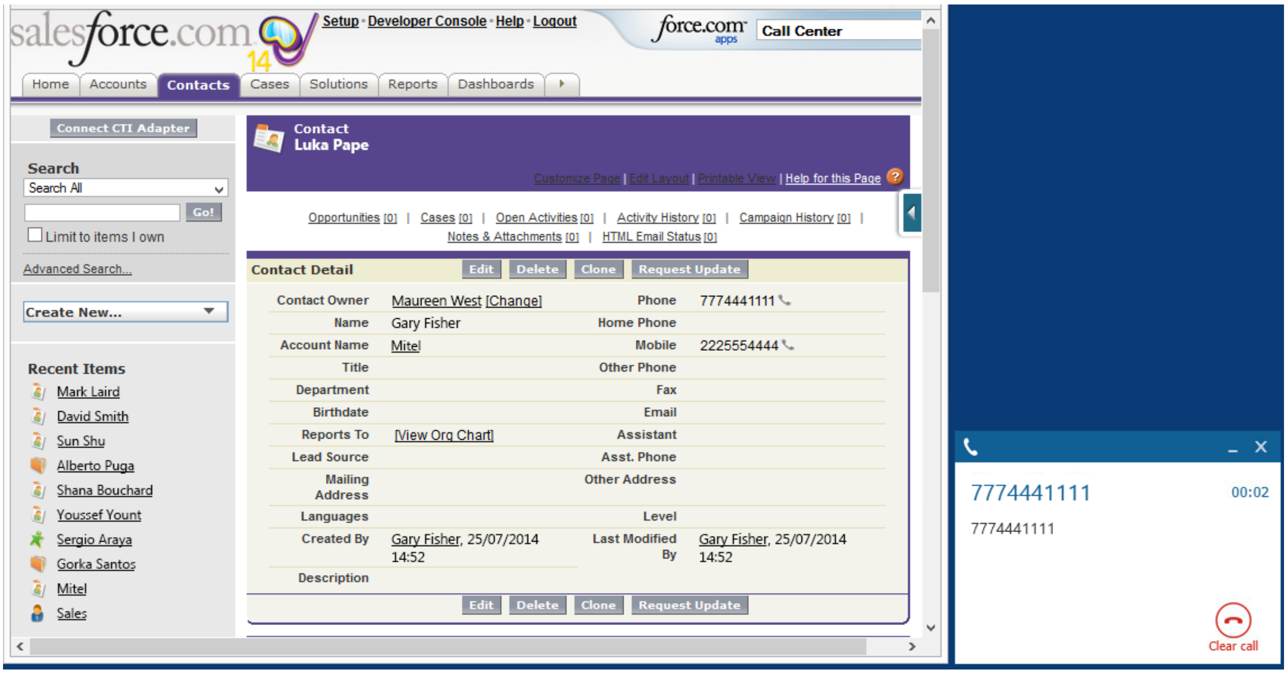
Features

Integration with SalesForce supports the features listed below:

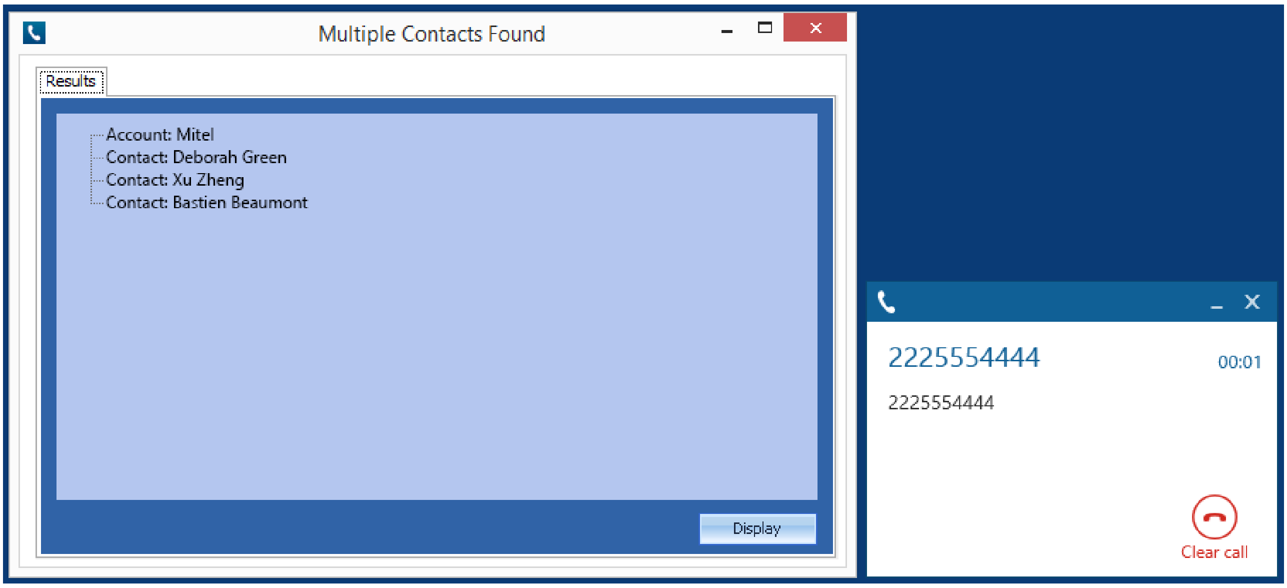
- Screen pop for contacts
- Automatic call history entry

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.



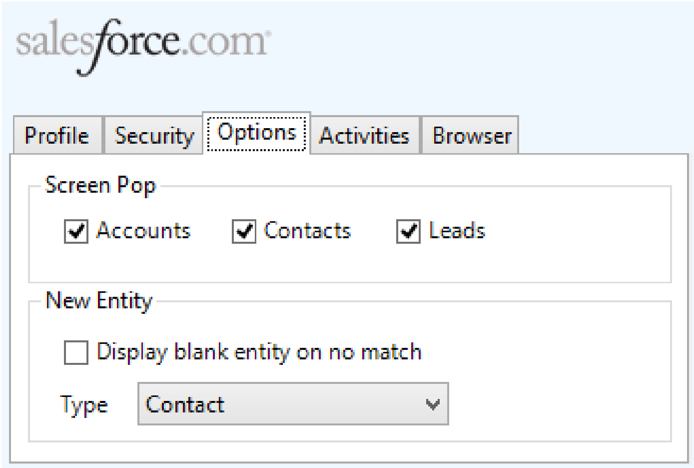
If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found one matching *Account* entity and three matching *Contact* entities that have this telephone number.



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

Entity and matching options

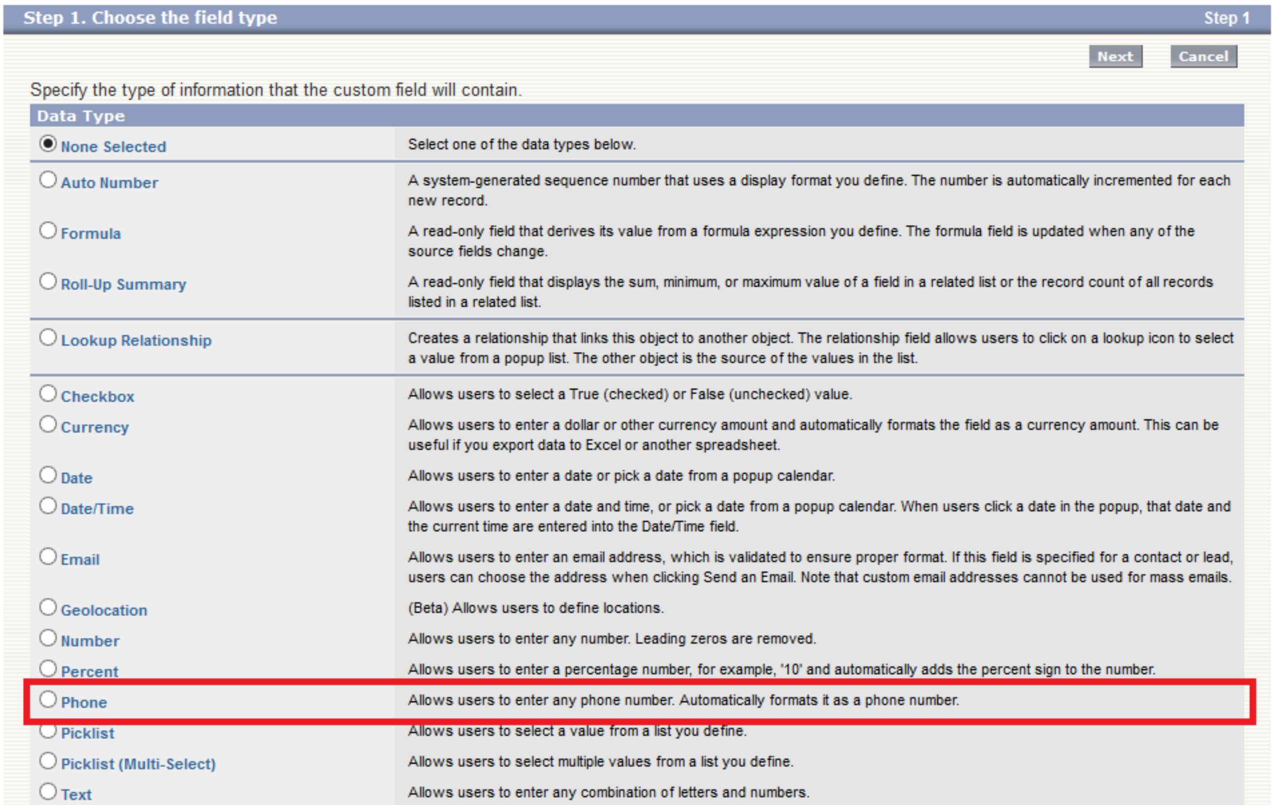
Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab



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.

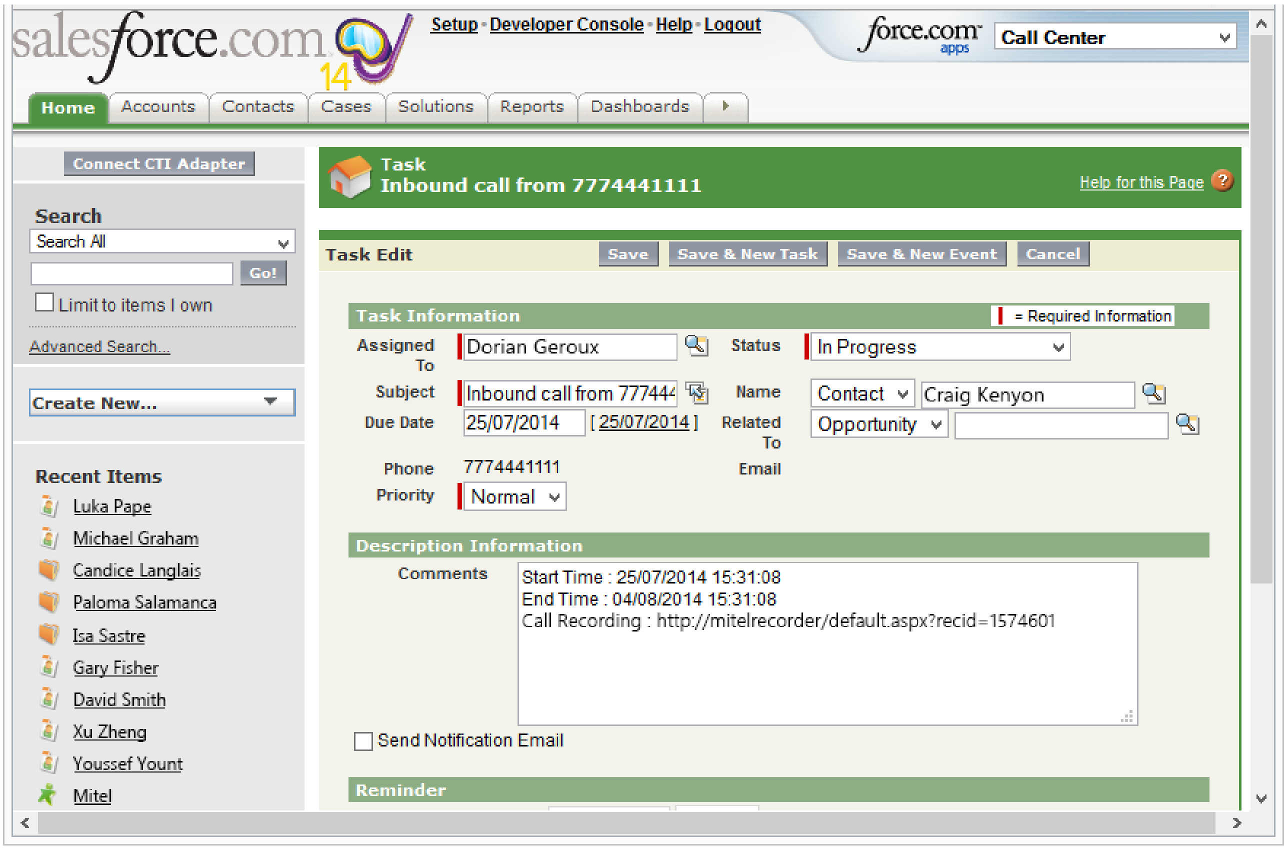


The format of the telephone number does not make any difference as any type of format is supported. The number dialled/received is used for the searching.

Automatic call history entry

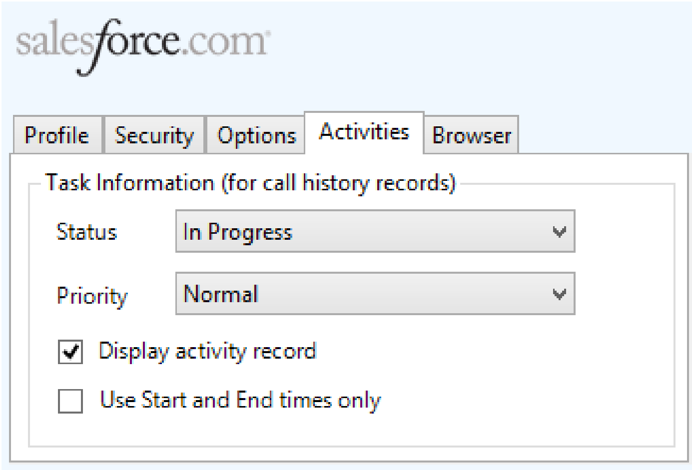
The plugin supports the ability to be able to automatically create and display a SalesForce Phone Task entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the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

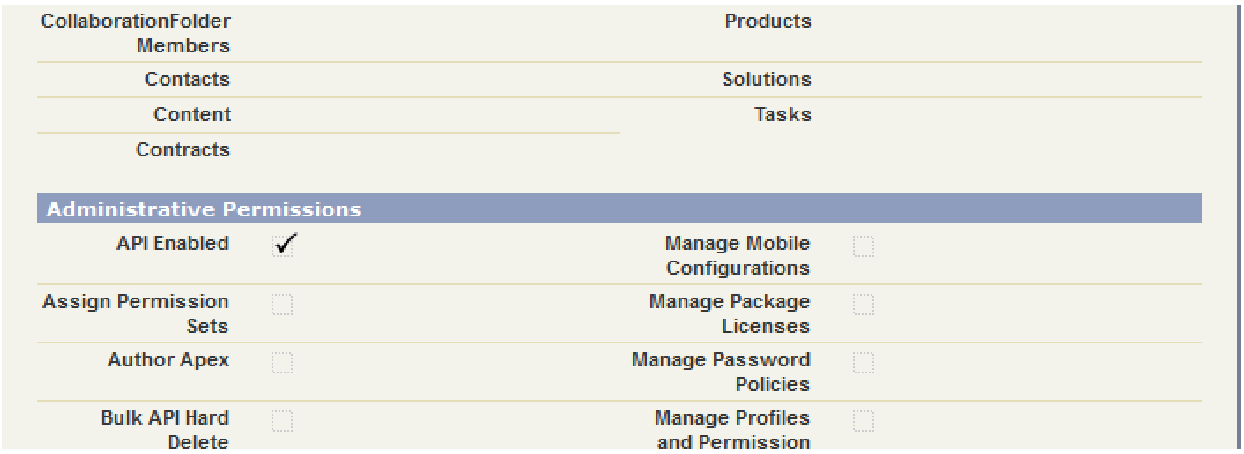
Use Start and End times only: If this is set then only the start and end time will be populated into the *Comments* section for a call history entry.

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.

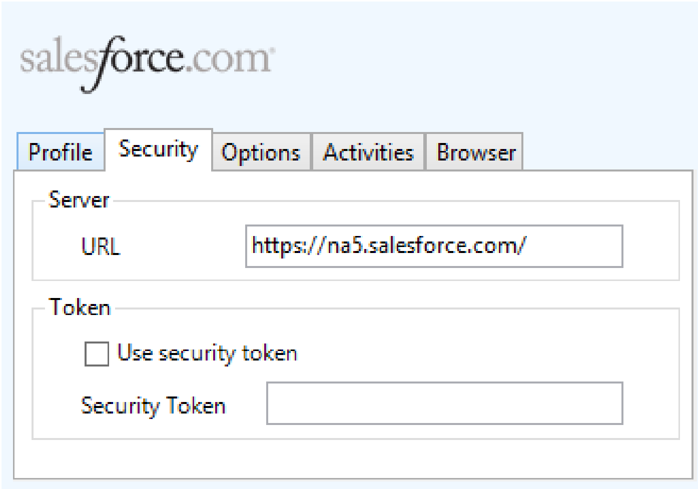
User authentication

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*.

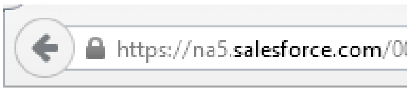


Security

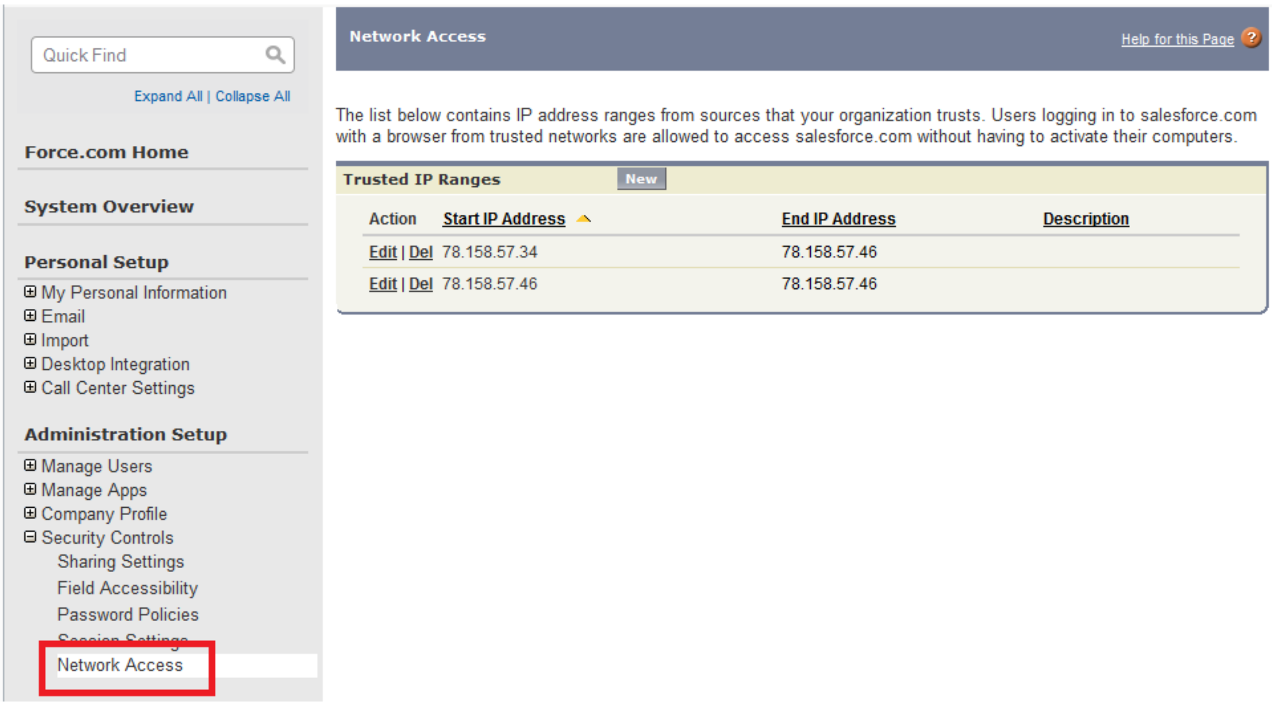
The Security tab enables the type of access and location of the Salesforce services to be set.



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.

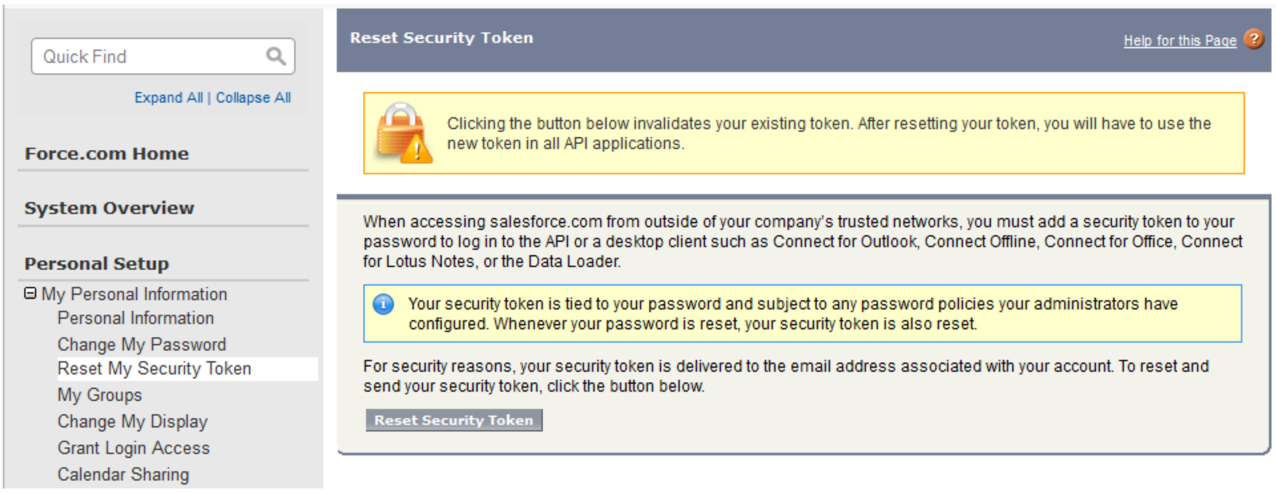


Token: Depending on the security configuration of SalesForce and how it is accessed will dictate what options are required. To connect to the SalesForce API requires that the public IP address that the user is connecting from is configured in the *Administration Setup* -> *Network Access* section under *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.

7.7.11 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

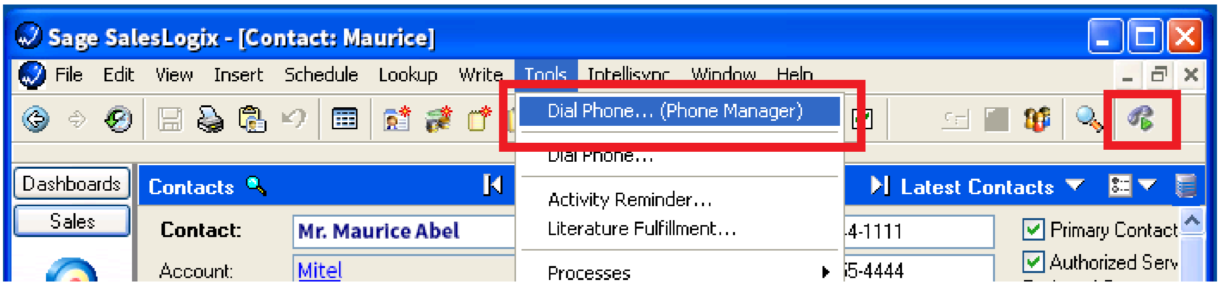
Features

Integration with SalesLogix supports the features listed below:

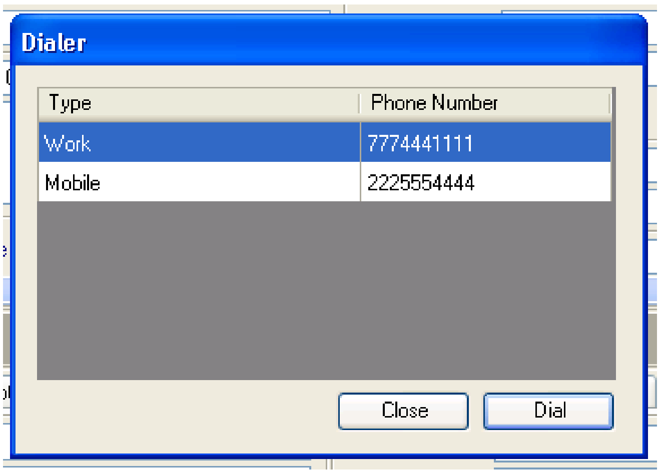
- Click to dial
- Screen pop
- Automatic call history entry
- Calendar & DND synchronisation

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.

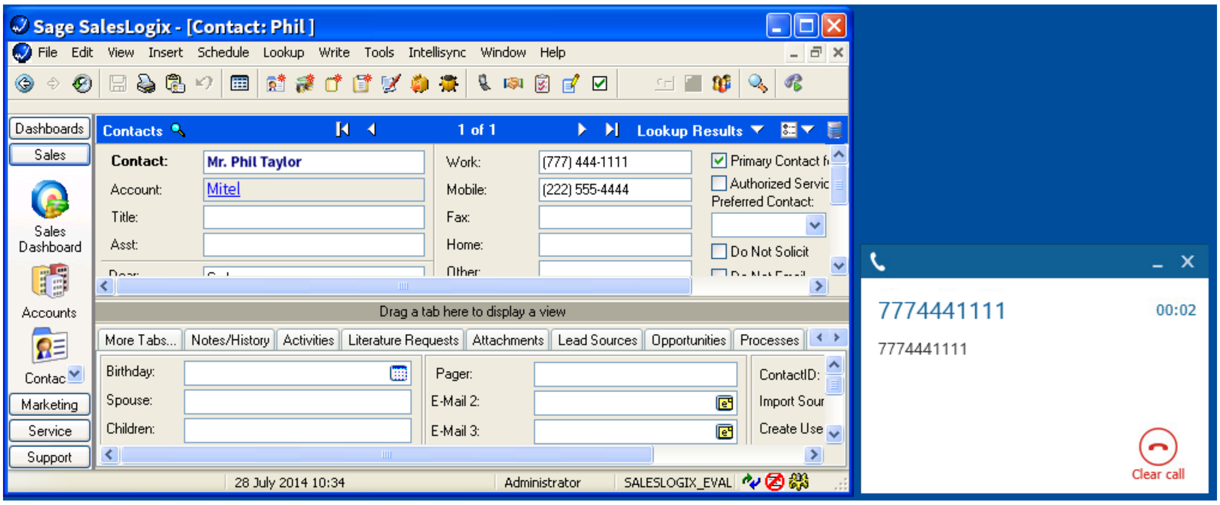
If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

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

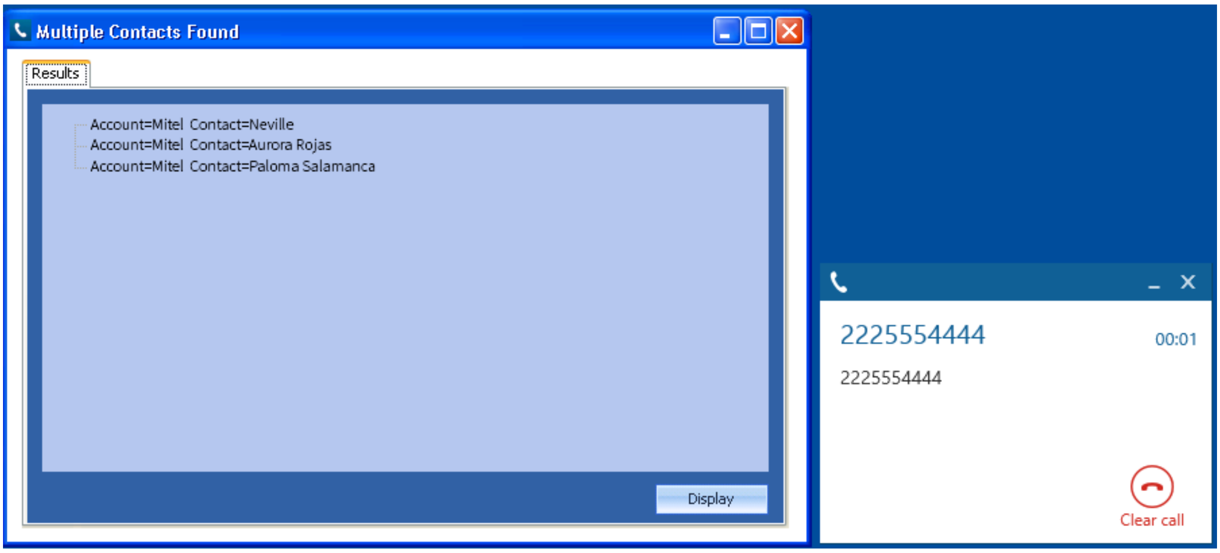
The SalesLogix bundle is available on request and needs to be installed by your SalesLogix administrator (see the SalesLogix Bundle section for details)

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.



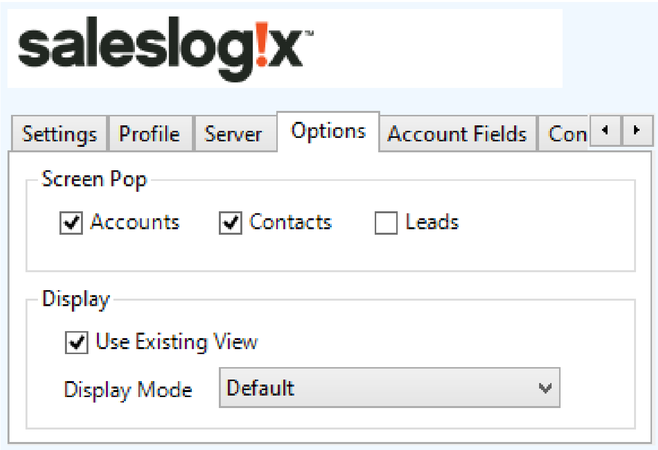
If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Contact* entities that have this telephone number.



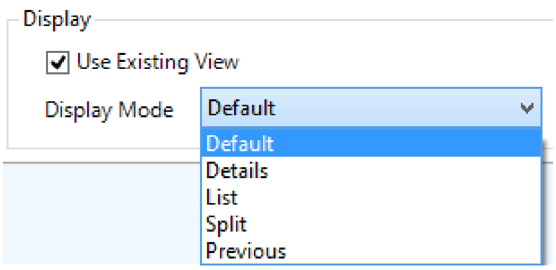
The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

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.



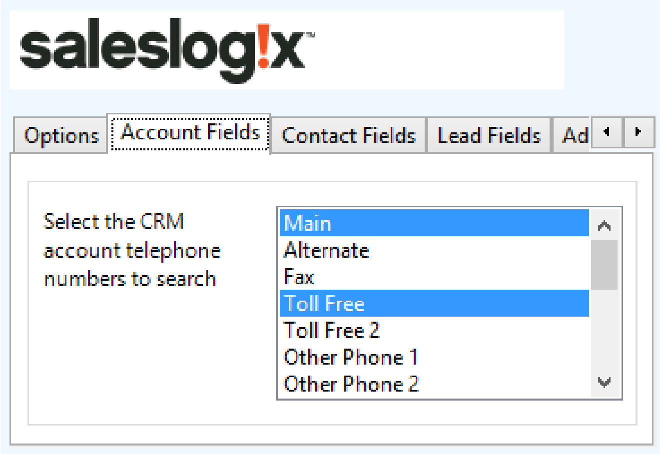
When SalesLogix is screen popped the display mode for how any matching records are shown can be configured as shown.



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

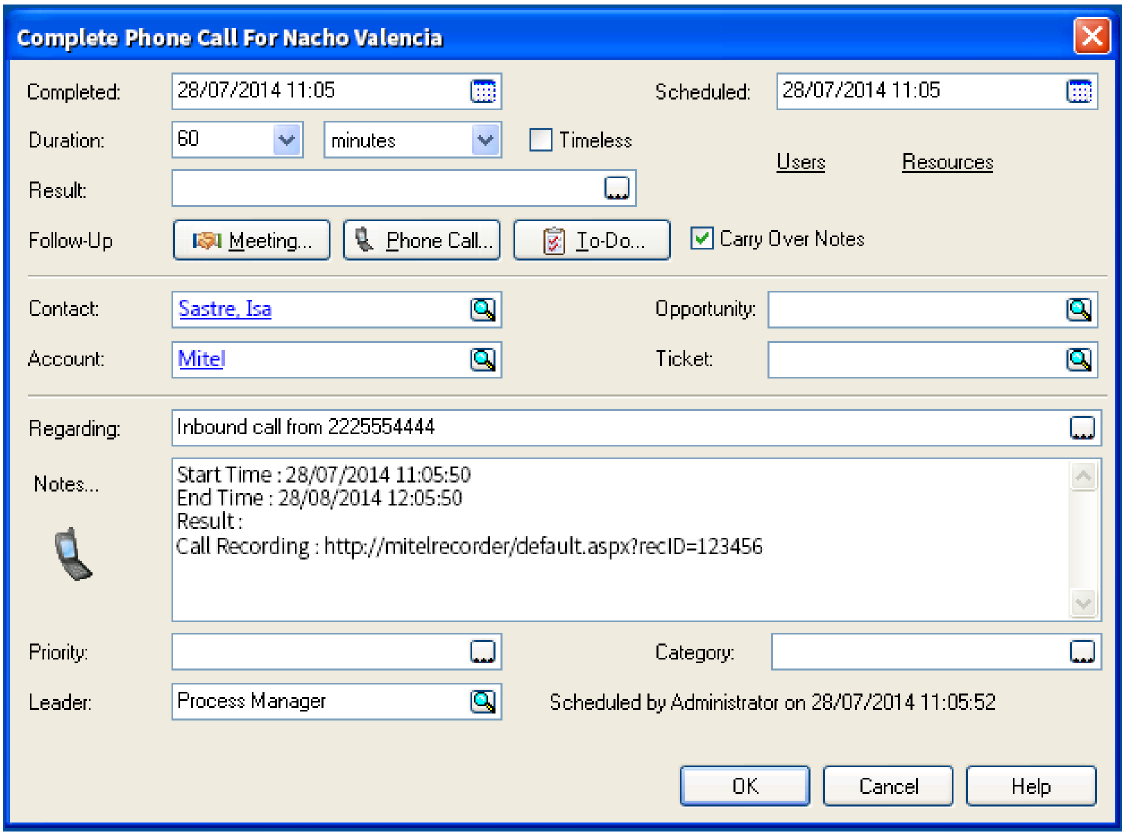
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

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.

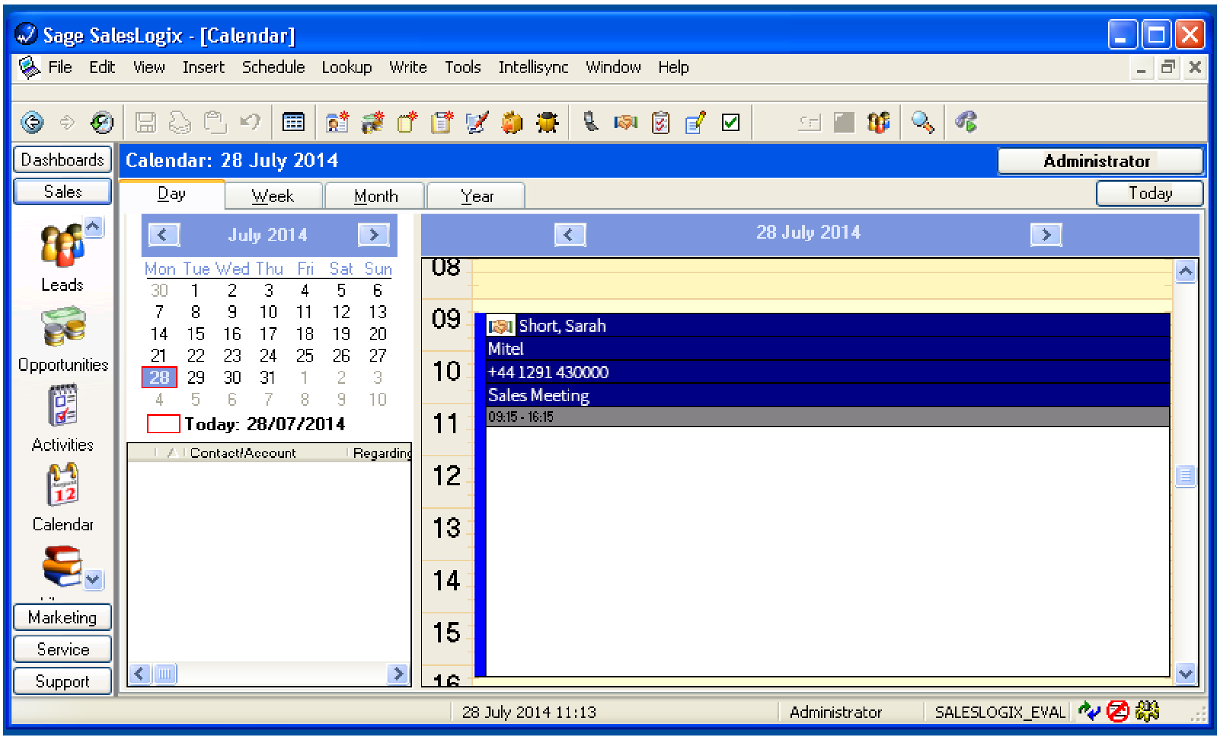


Start Time	The date and time when the call was started.
End Time	The date and time when the call was ended.
Result	The account code entered on the call.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can 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".

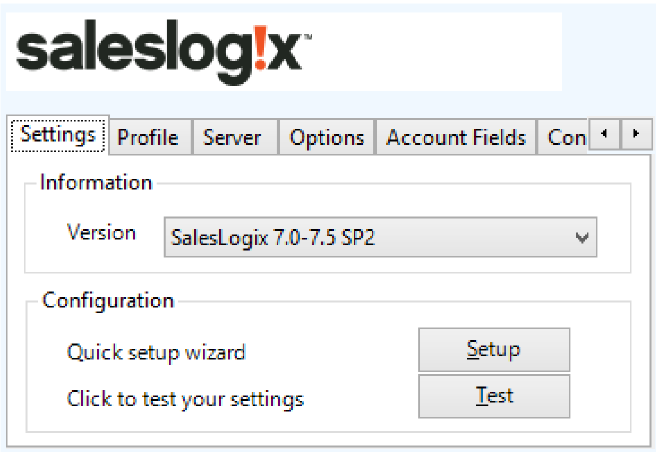


Configuration

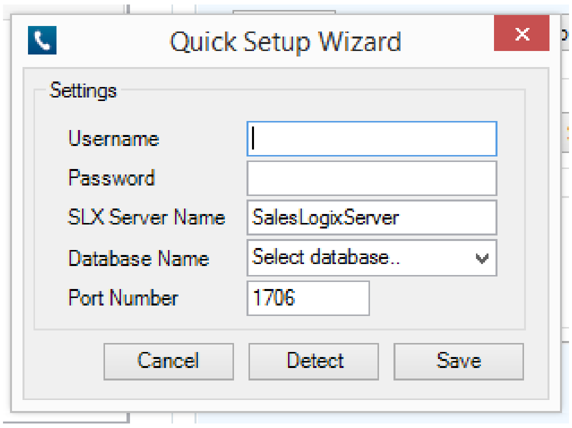
For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to SalesLogix.

Wizard

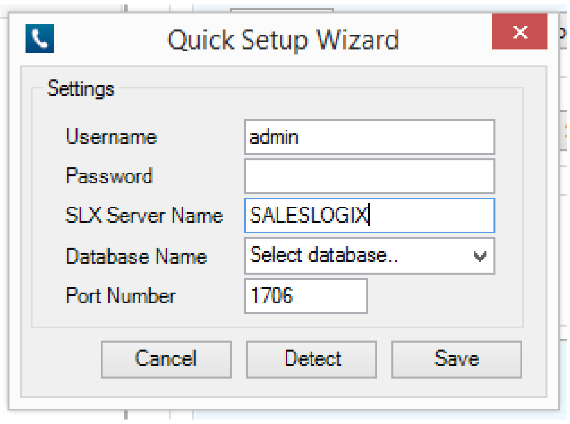
The *Settings* tab provides a *Quick Setup Wizard* to enable these to be easily configured.



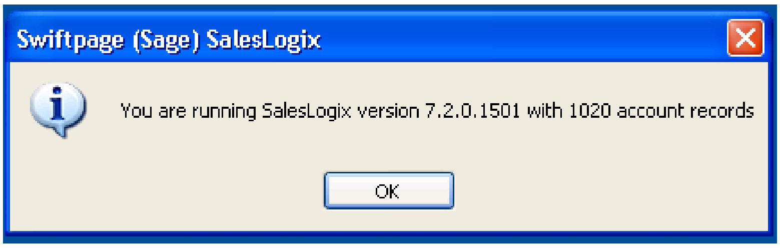
Click on the *Setup* button to start the wizard.



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



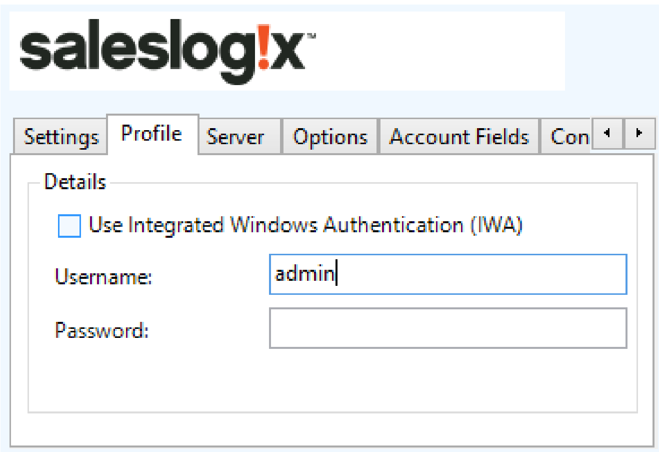
Select the *Database Name* for the SalesLogix database to use and then click *Save*. From the *Settings* tab click on the *Test* button to validate the details and a confirmation message will be displayed if the configuration is successful.



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.

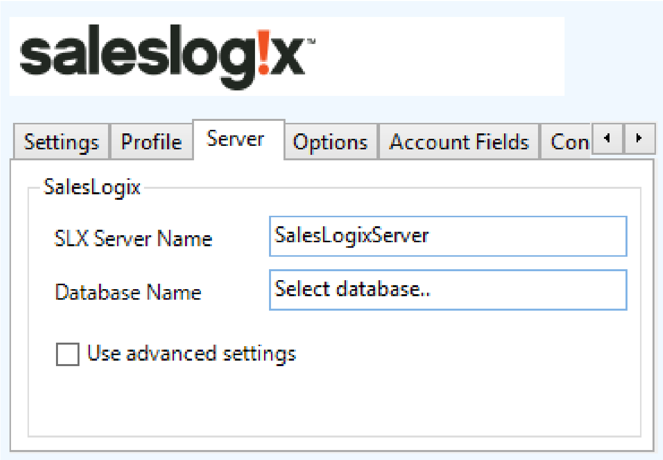


Use Integrated Windows Authentication: If this is set then the username, password and domain details from user who is logged on the computer will be used.

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.

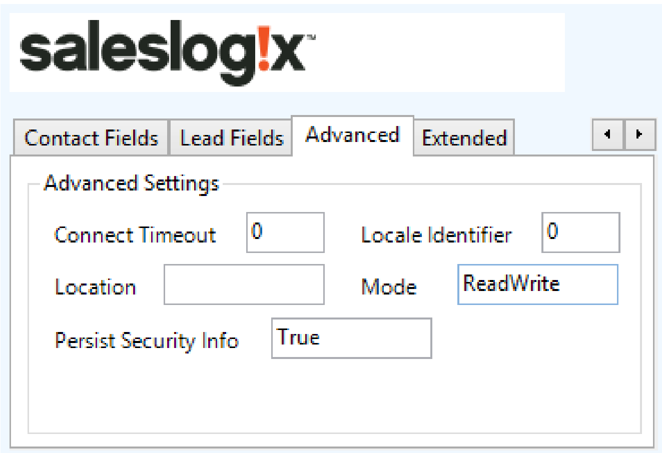
Database Name: The name of the SalesLogix database to use.

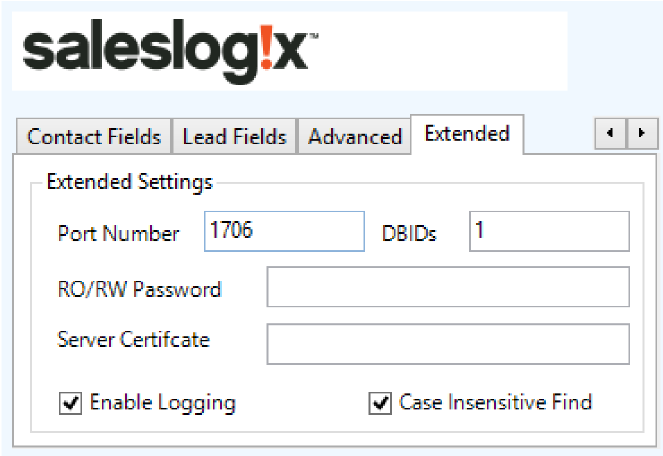
Advanced Settings: Enables the Advanced and Extended tabs for extra configuration options.

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.

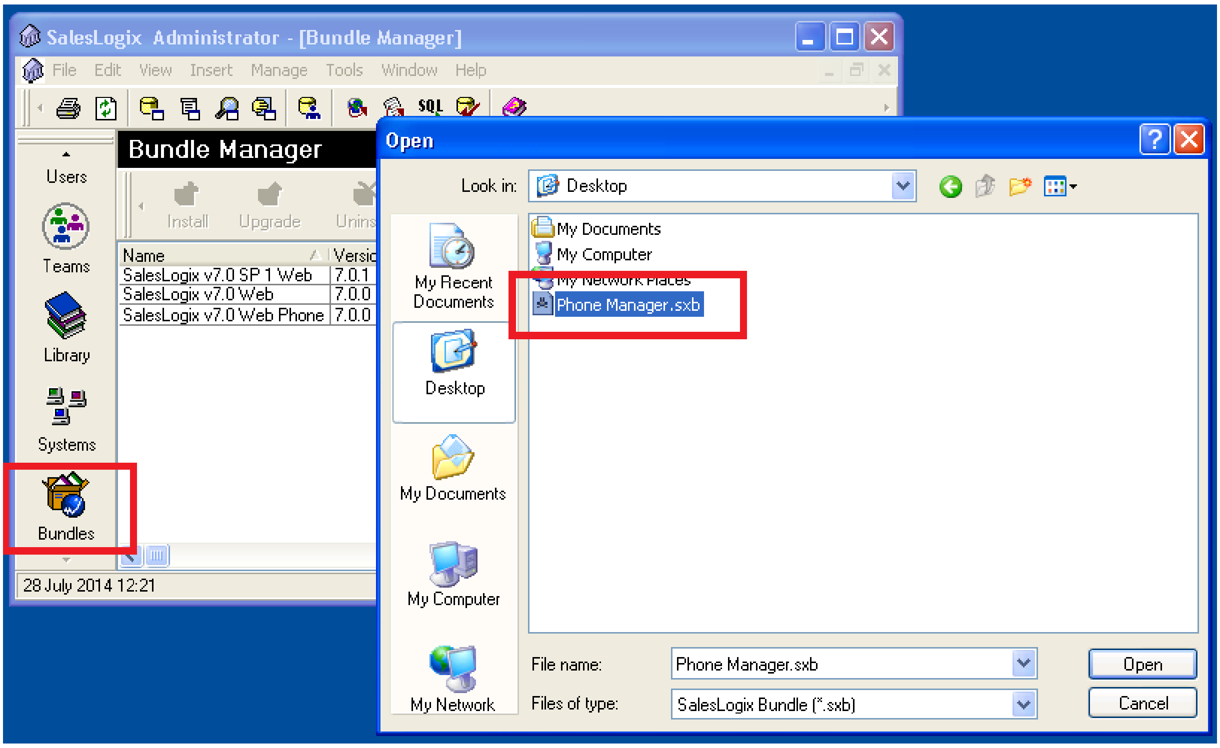




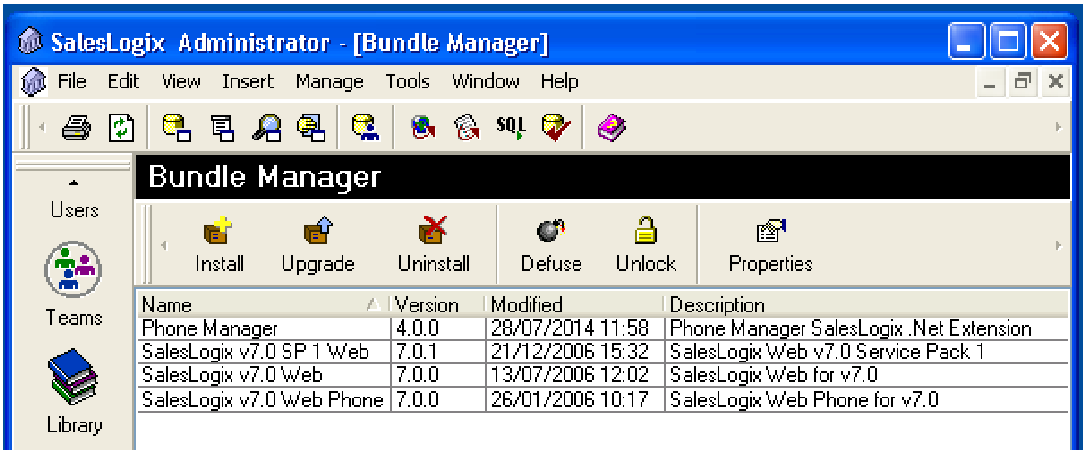
Sales Logix Bundle

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.

7.7.12 SugarCRM

Overview

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

Supported Versions

Version	On-premise deployment	Cloud
v6.4 - v7.6		

> 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.

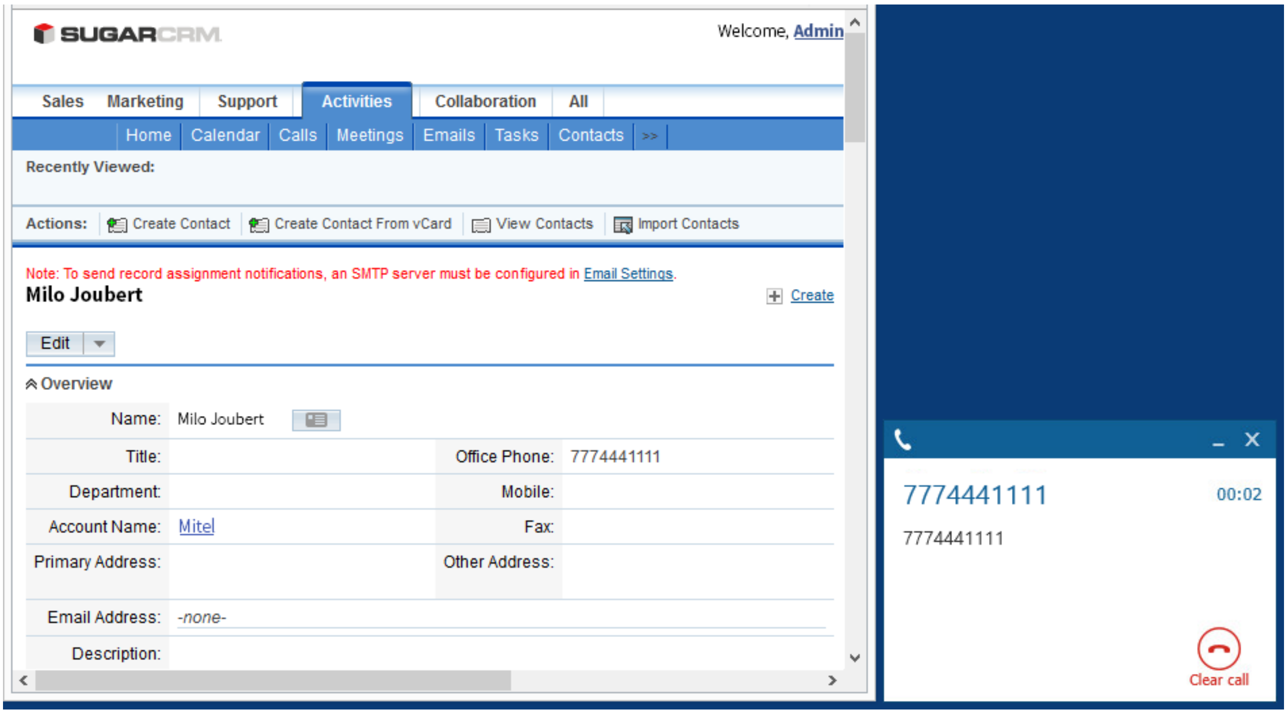
Features

Integration with SugarCRM supports the features listed below:

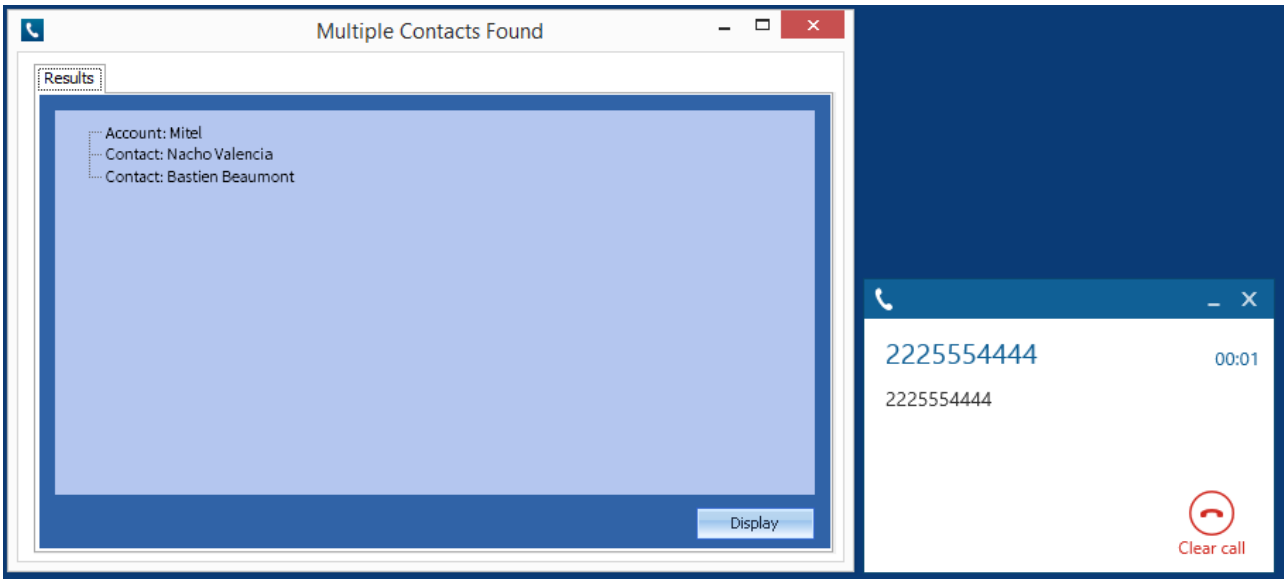
- Screen pop for account, customer and lead records
- Automatic call activity entry

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.

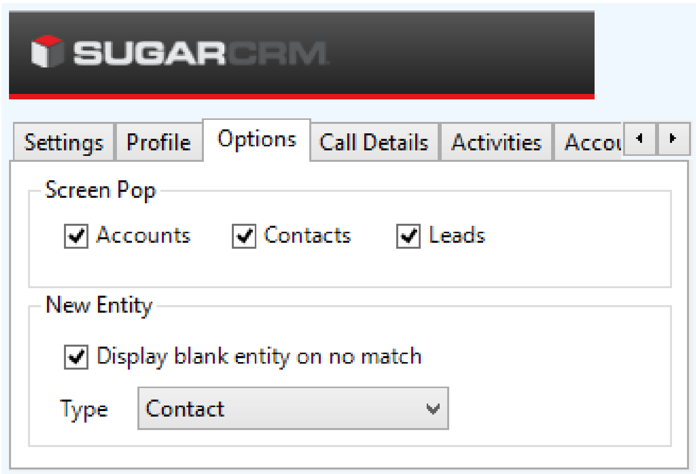


The correct record can then be highlighted and then clicking on the *Display* button or double clicking the entry will open this record.

> 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

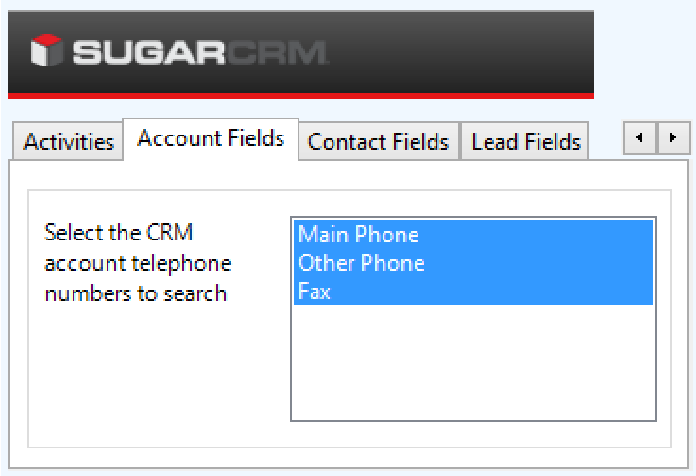
Configuration options are available on the plugin that allow the type of *Records* to be used in the searching to be set. For example it can be configured so that only the *Contact* records are searched. These options are set on the *Options* tab.



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 Microsoft Dynamics CRM 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.

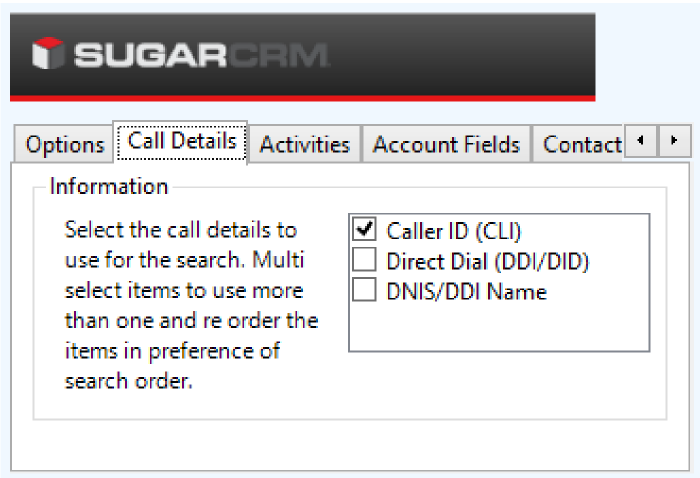
UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

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.

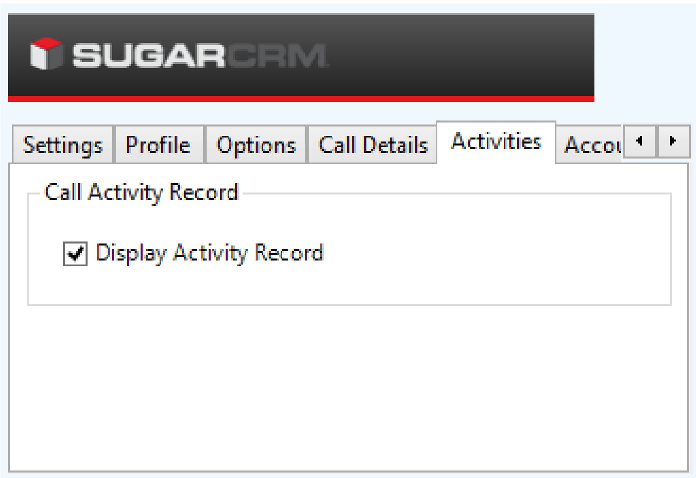
Automatic call history entry

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.



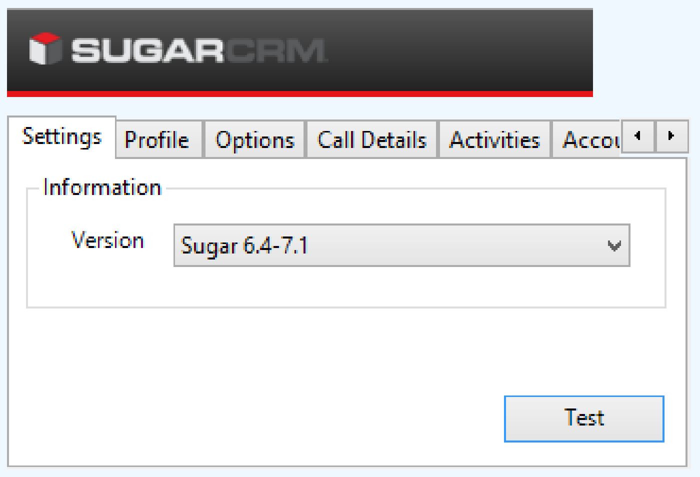
Display activity record: This will display the *Activity* form, if this is not set then the record will be created without the user seeing the form.

Configuration

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

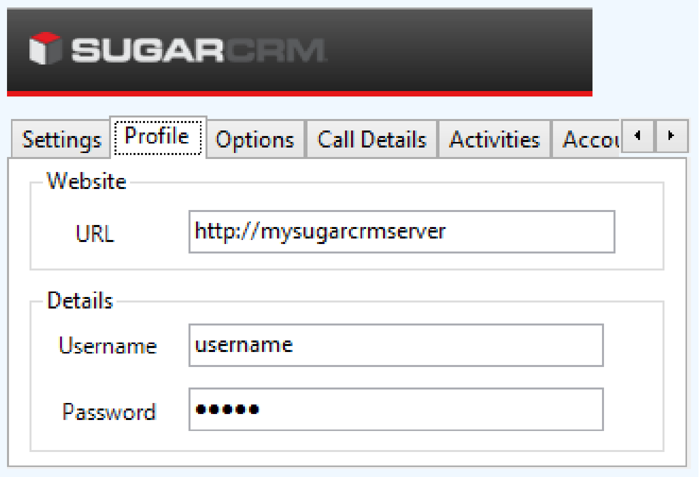
Settings and versions

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.

7.7.13 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
v15 (2013)	
v16 (2014)	
v17 (2015)	
v18 (2016)	

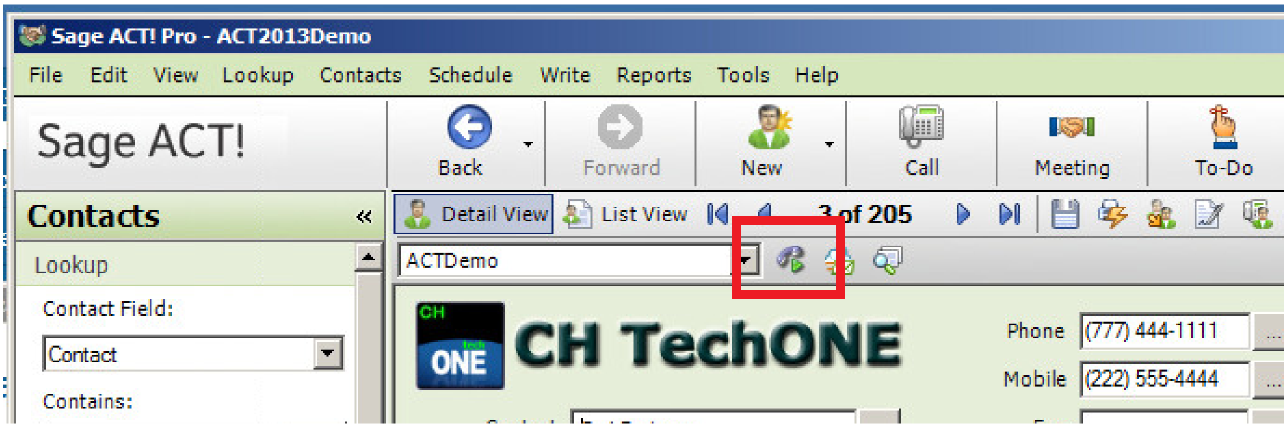
Features

Integration with Act! supports the features listed below:

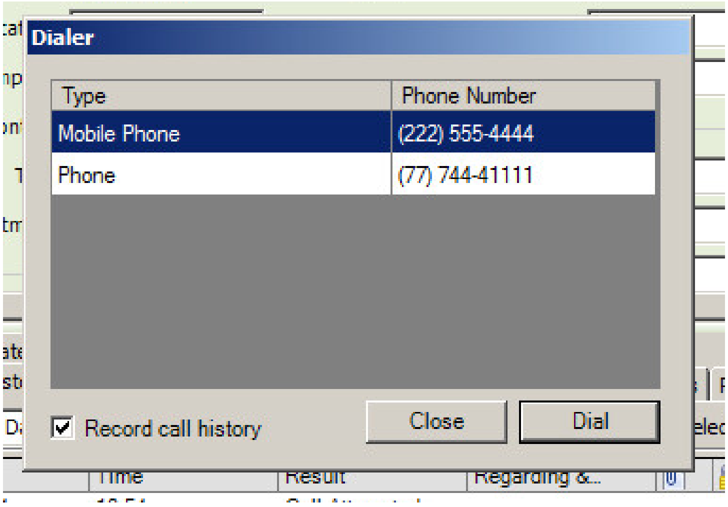
- Click to dial
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

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!.

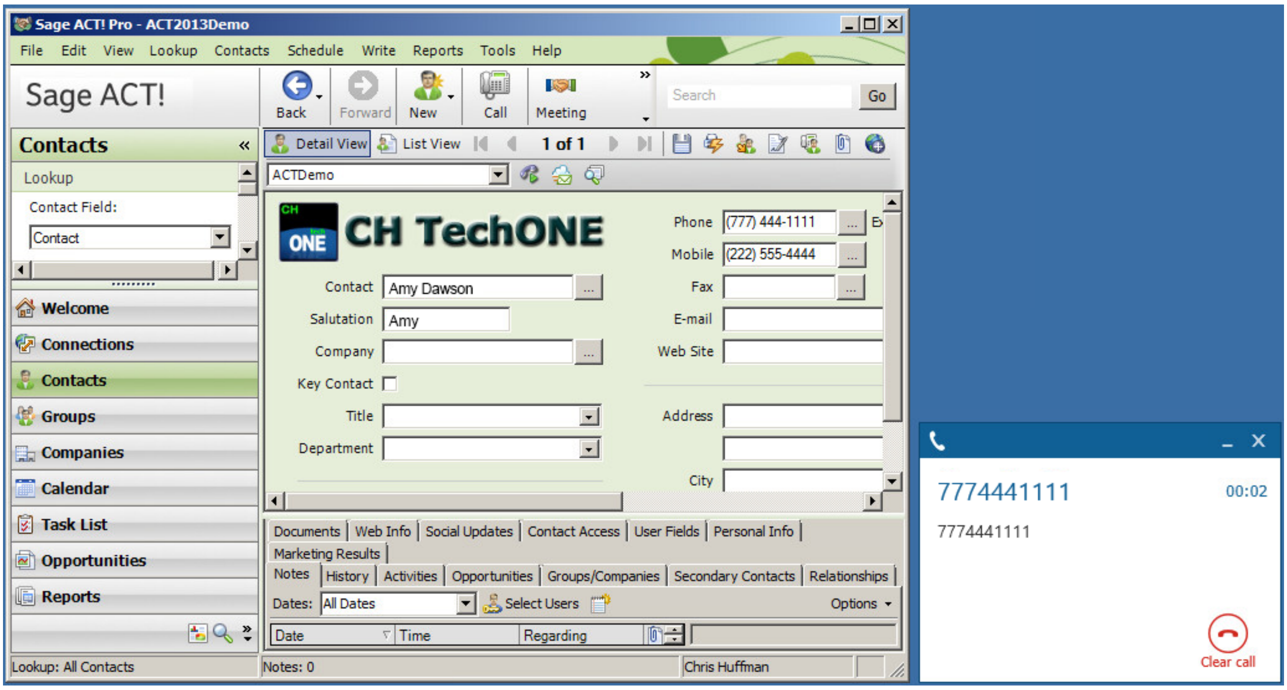
When an outbound call is made using this method a call history record can be created and opened once the Dial command has been selected. To enable this select the *Record call history* option on the form.

> 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.

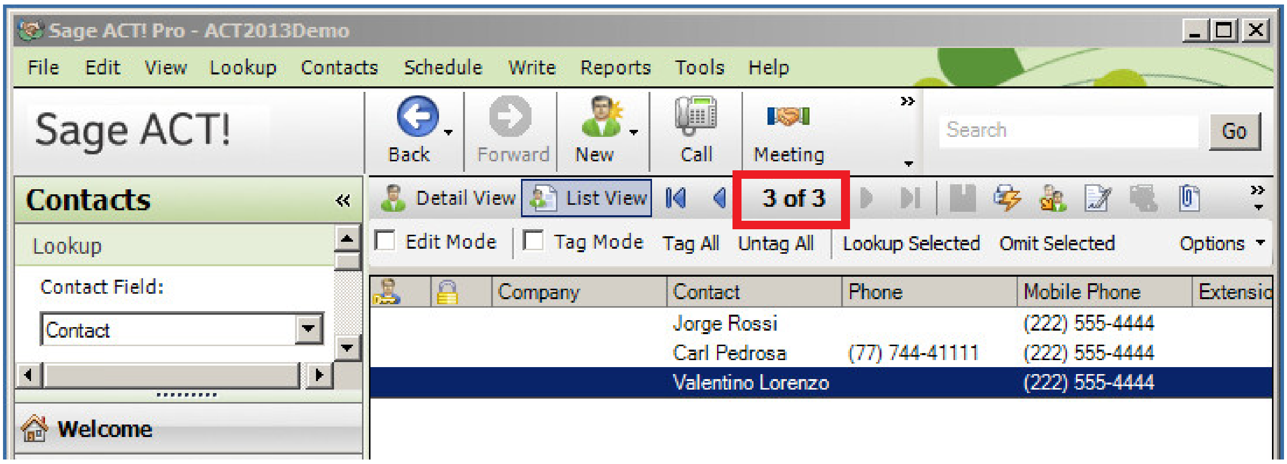
> ⚠ This direct dial out replaces the built in TAPI based “Dialler” feature within Act! and should not be used at the same time. To disable the built in “Dialler” feature, from the menu bar select Tools -> Preferences -> Communication -> Dialler Preferences and un check the Use dialler option.

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.



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

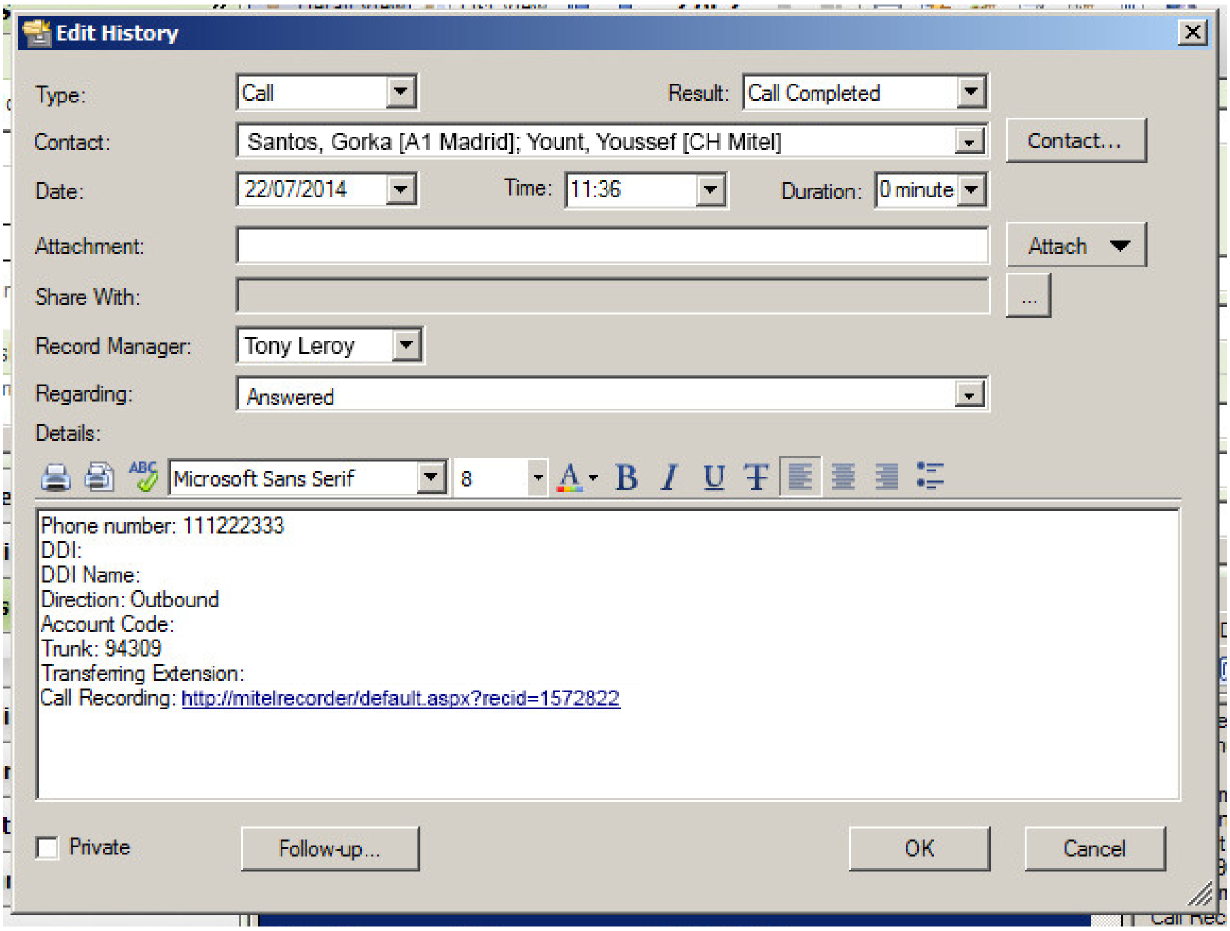
The range of telephone numbers that are to be searched for can be configured. By default the common telephone number fields are pre selected.

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.



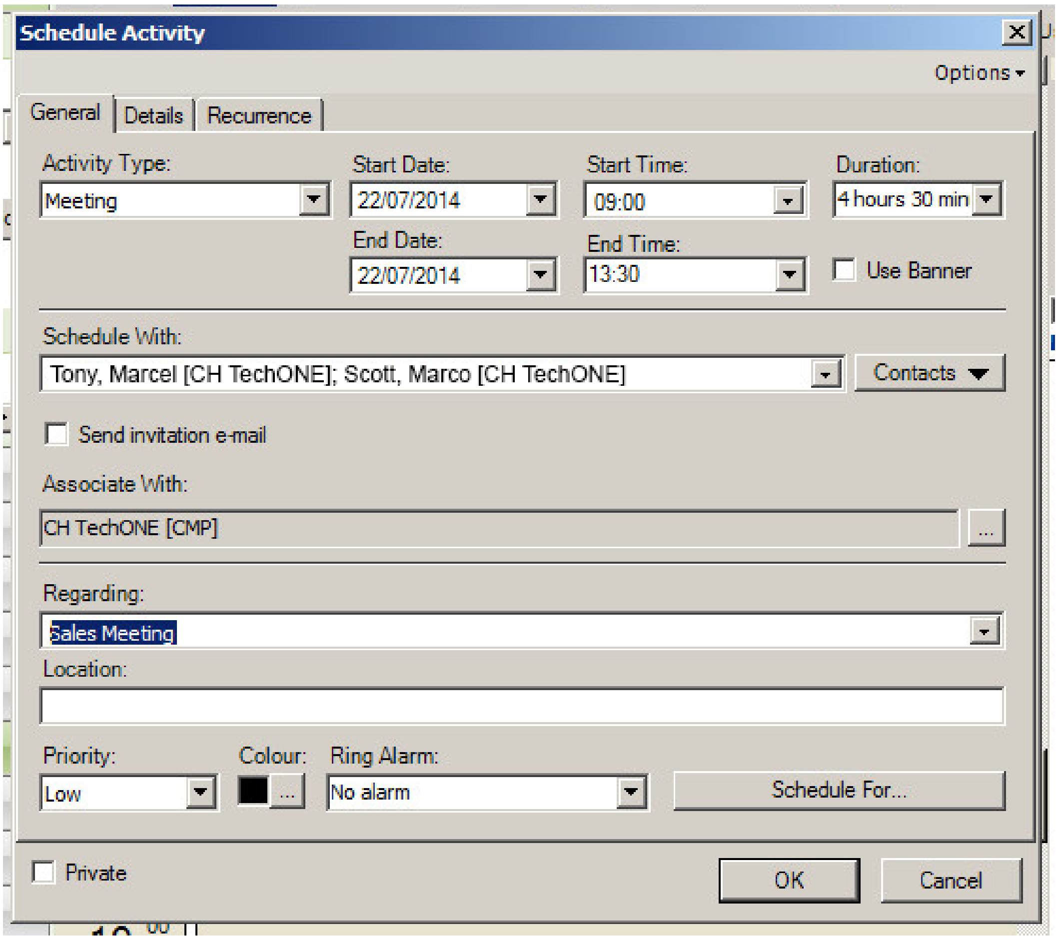
Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction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

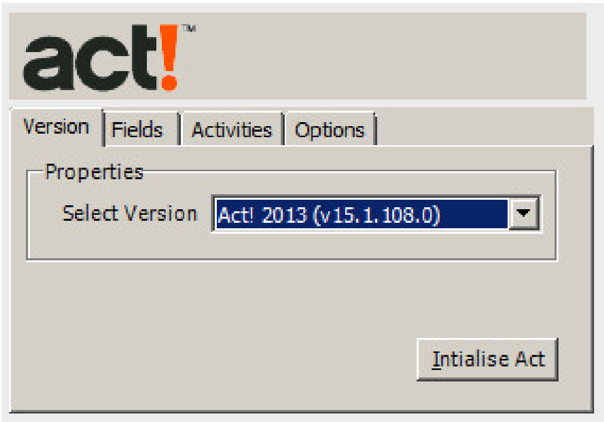


There are options to be able to select the type of *Activities* that trigger the DND change and these are configured on the *Activities* tab.

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

7.7.14 TigerPaw

Overview

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

Supported Versions

Version	Supported
14.1.20	✓
15.2.02	✓

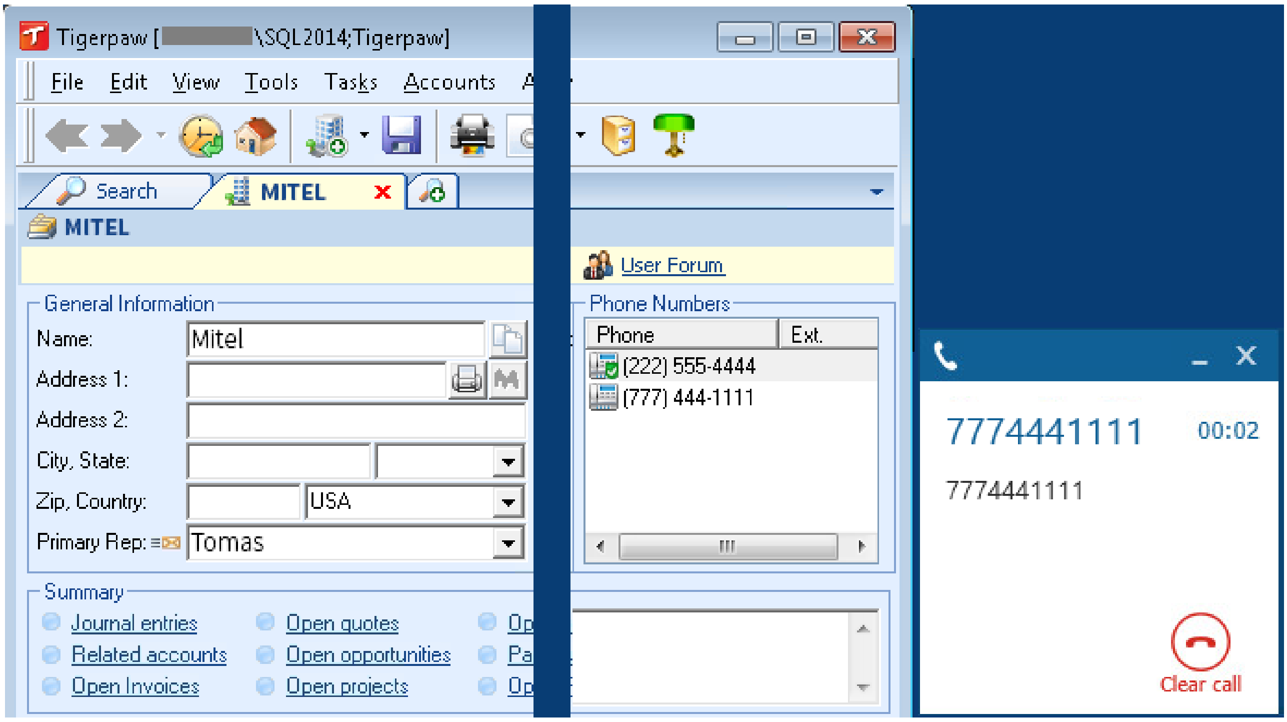
Features

Integration with TigerPaw supports the features listed below:

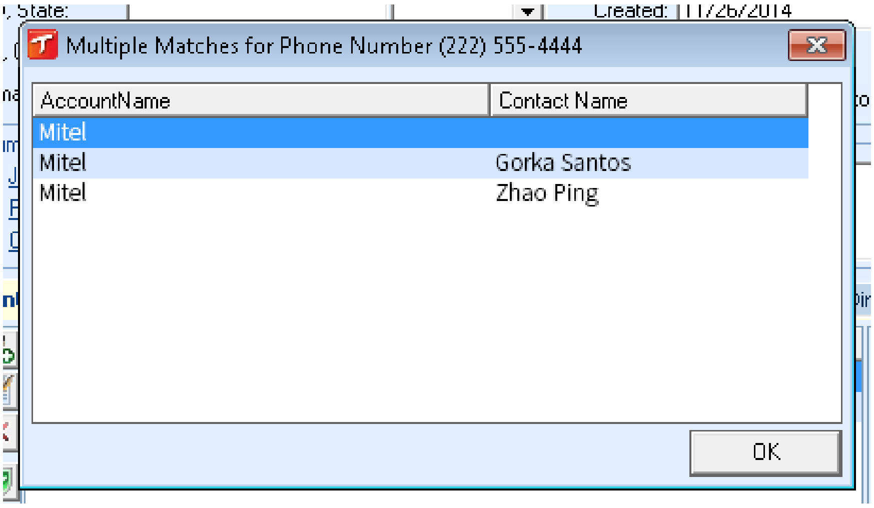
- Screen pop for accounts
- Automatic call history entry
- Calendar & DND synchronisation

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.

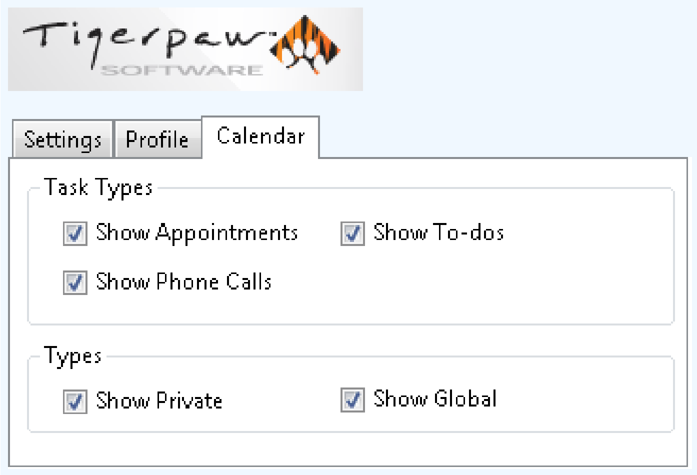
Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction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

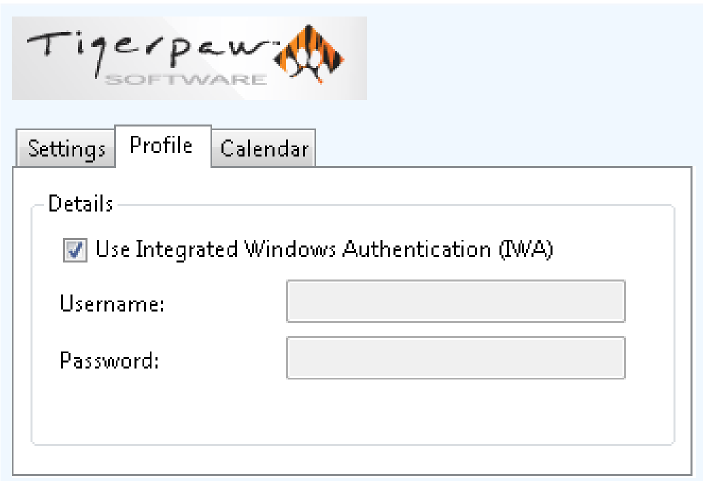


Show Appointments: This enables *Appointment* task to be included in the synchronisation.
Show To-dos: This enables *To-do* tasks to be included in the synchronisation.
Show Phone Calls: This enables *Phone Calls* tasks to be included in the synchronisation.
Show Private: This enables *Private* tasks 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.

7.7.15 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.

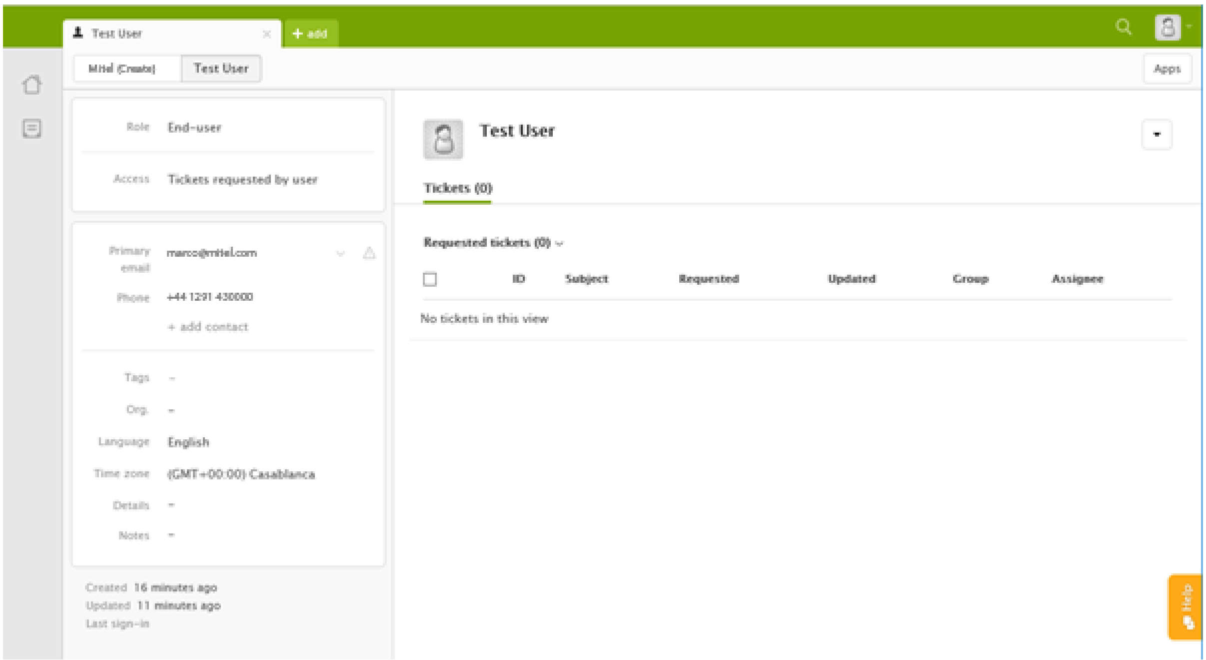
Features

Integration with Zendesk supports the features listed below:

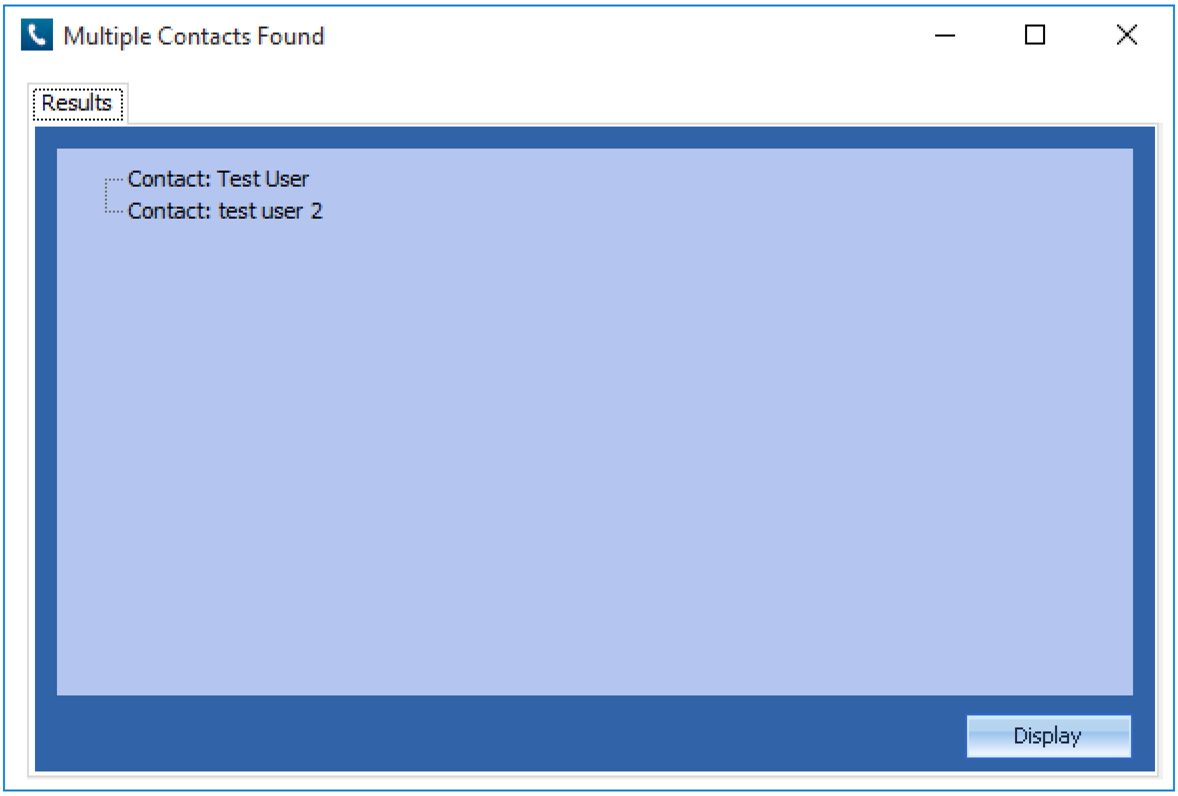
- Screen pop for contacts/open tickets

Screen pop

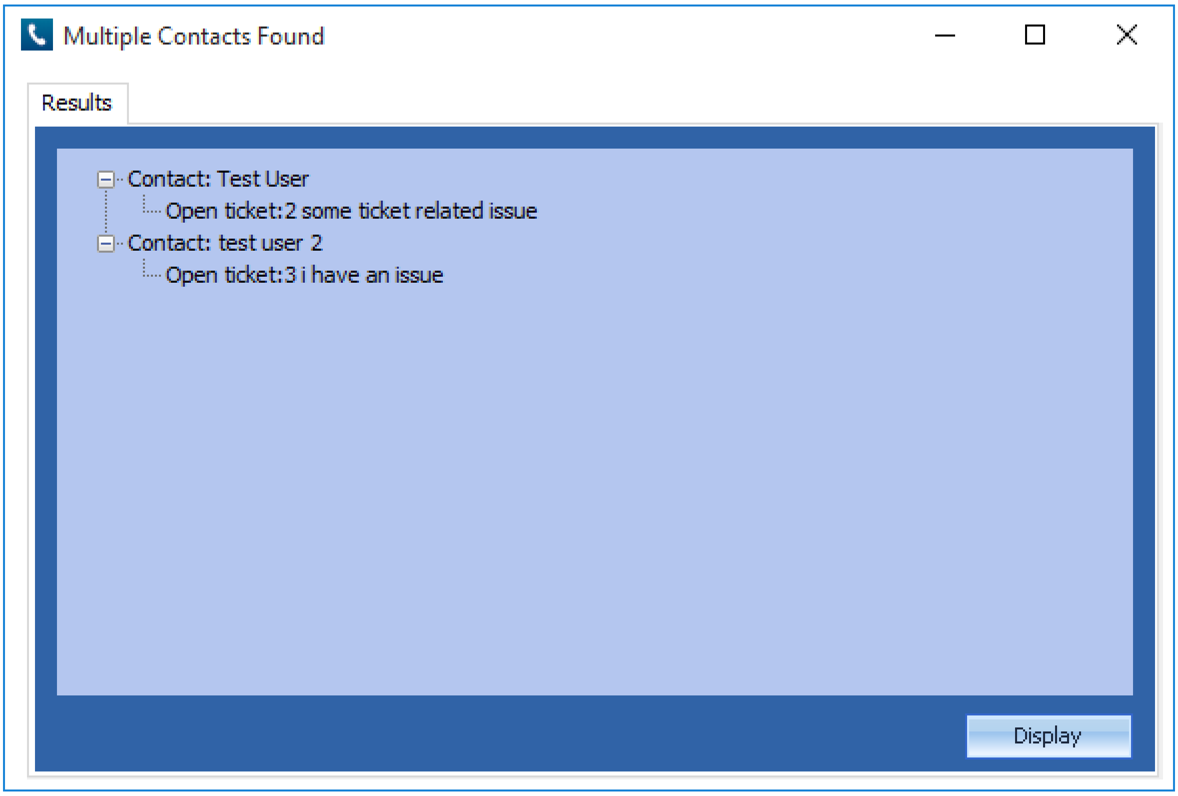
‘end-user’ people or their open tickets can be screen popped when an incoming call is received using the caller id (CLI) from the inbound call or the dialled number on an outbound call. For example an inbound call is received from 07718402534, if there are no tickets currently open for this ‘end-user’ then their user profile is displayed.



If multiple matches are found then the Multiple Contact Found dialog is shown:

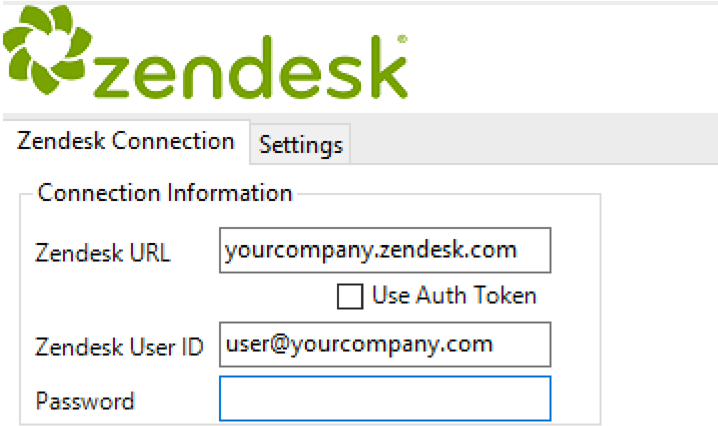


The Multiple Contact Found dialog will also be shown if the 'Search Open tickets on Contact Match' setting is enabled in the Phone Manager Plugin. The dialog will allow the selection of the specific ticket item to display:

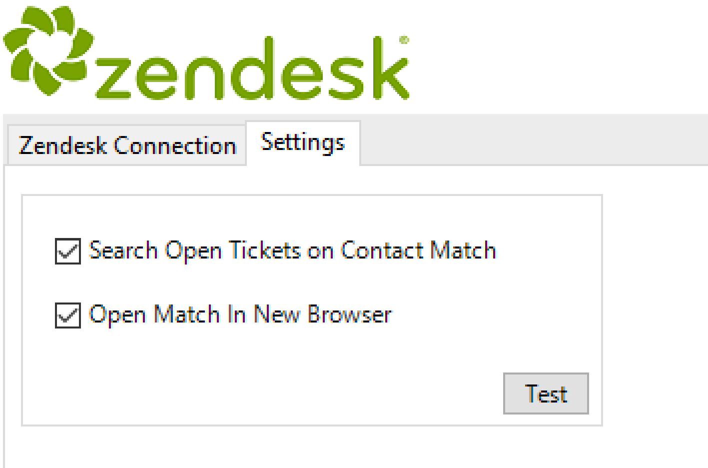


Configuration

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.



7.7.16 Zoho CRM

Overview

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

Supported Versions

Version	Cloud
2014	✓

> The integration uses Zoho CRM Web Services 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.

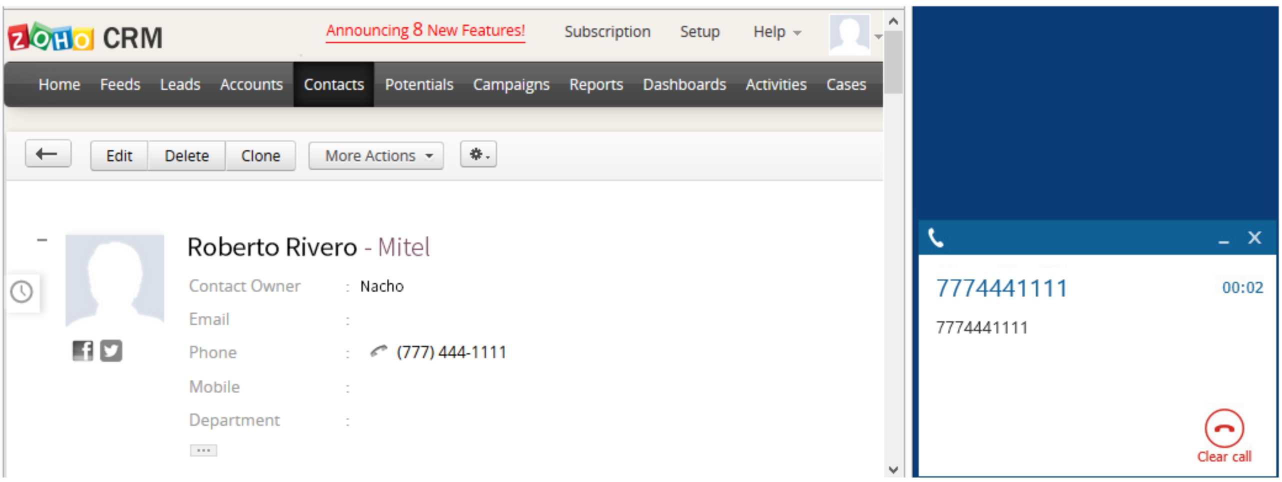
Features

Integration with Zoho CRM supports the features listed below:

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

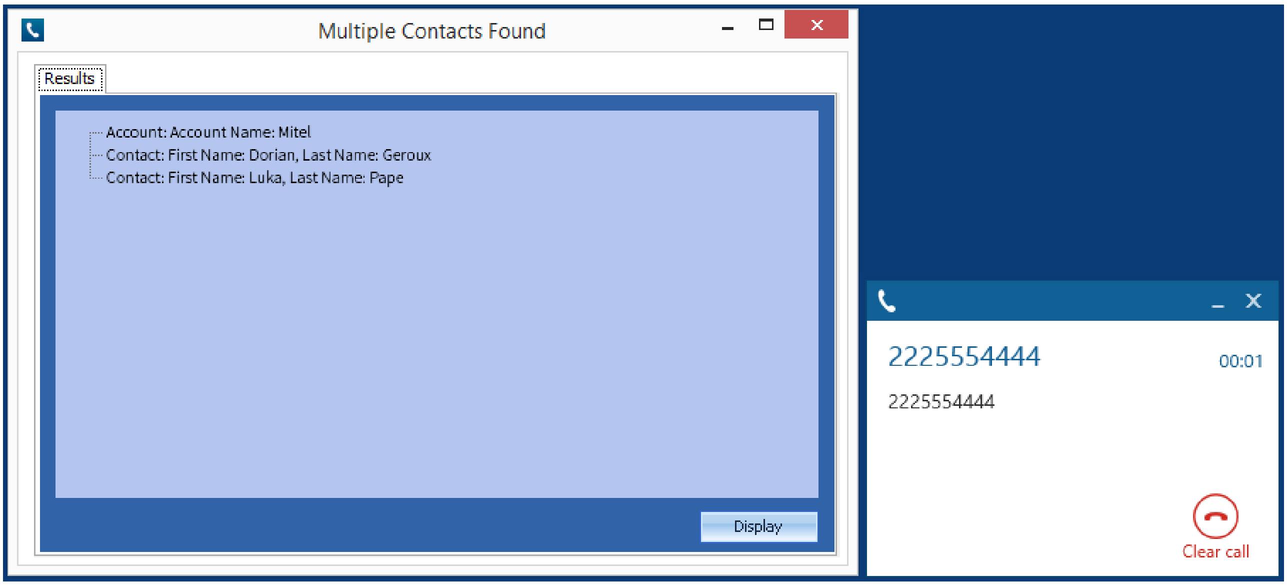
Screen pop

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

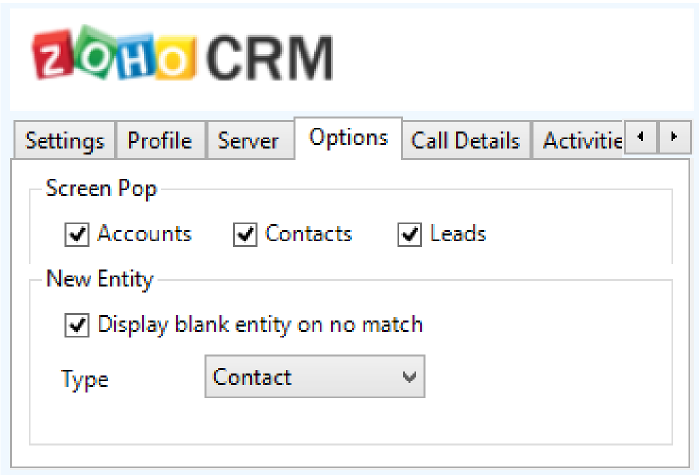
Lead, that have this telephone number.



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

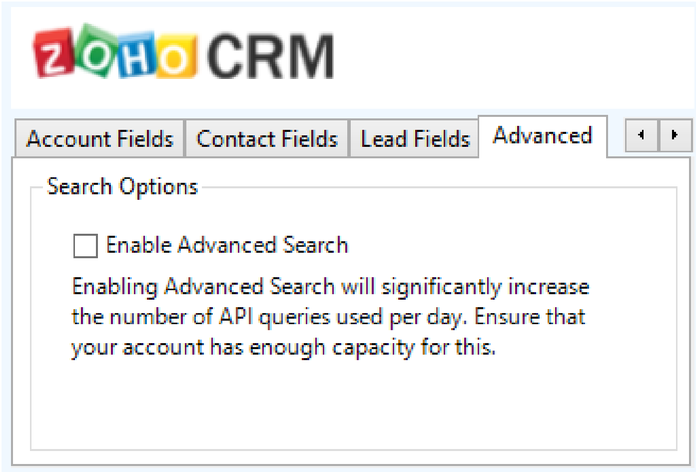


If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Advanced options

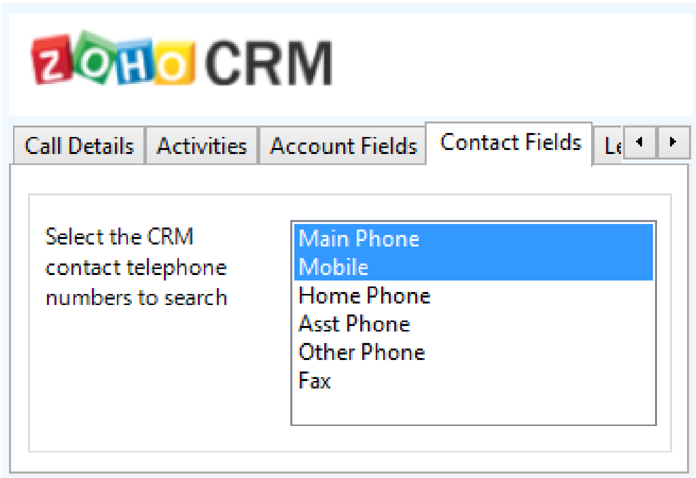
The *Advanced* tab control how matching contacts are searched for.

> ⚠ 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 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.



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

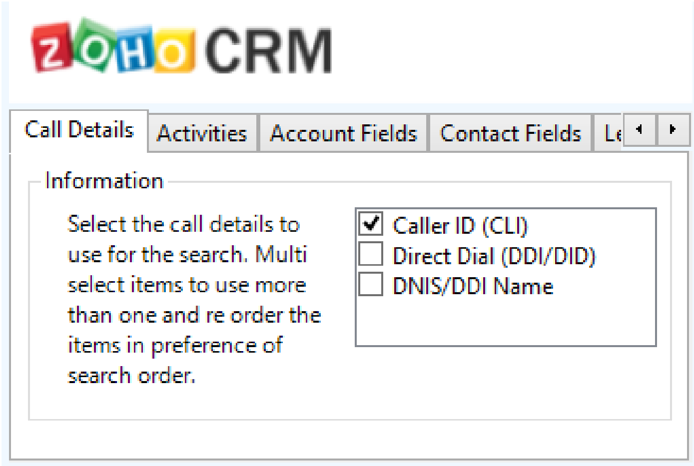
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

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.

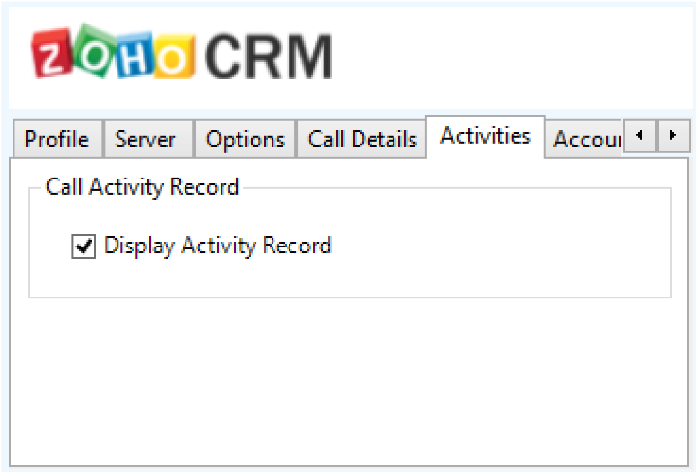
Automatic call history entry

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.



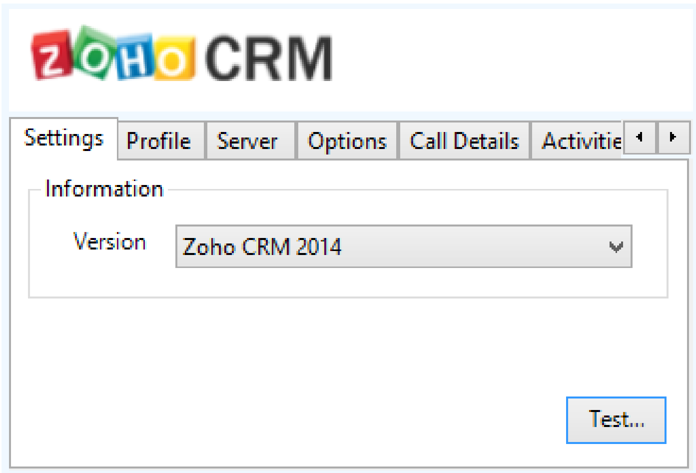
Display Activity Record: This will display the Activity form, if this is not set then the record will be created without the user seeing the form.

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.

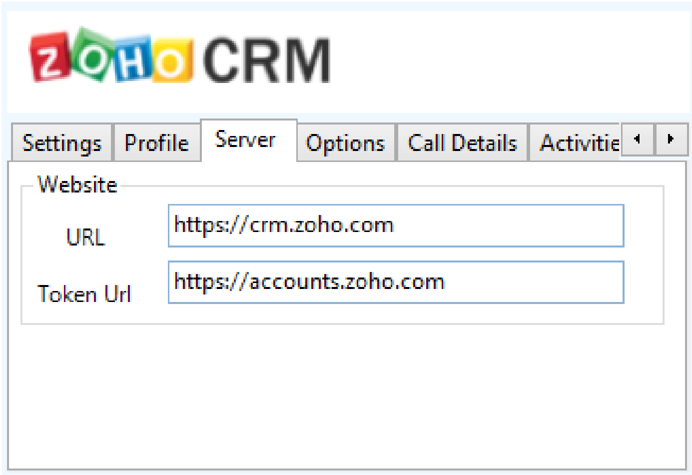
Settings and versions

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.

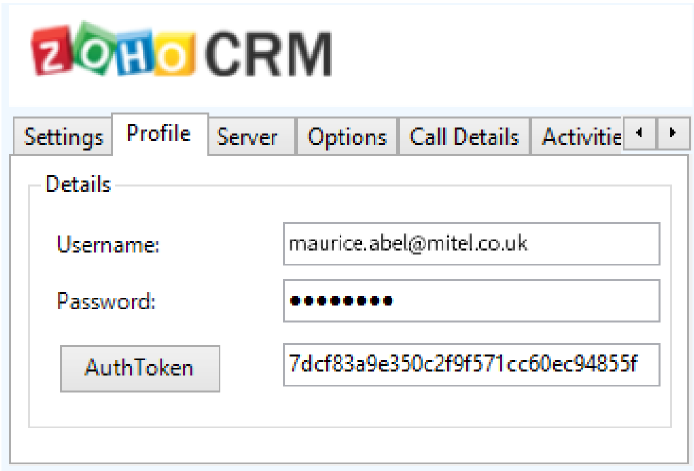


URL: This is the URL of the Zoho CRM server. Contact your administrator for details on what this should be. Leave this as https://crm.zoho.com for the hosted version.

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.

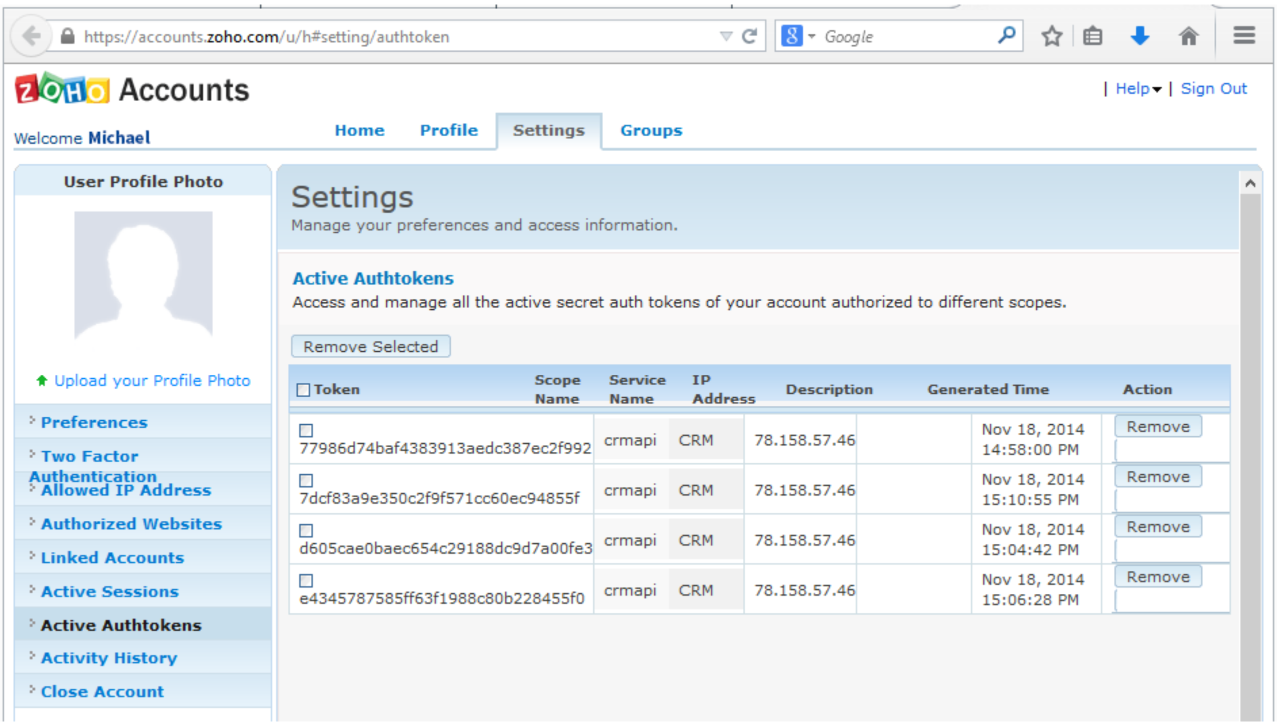


Username: This is the Zoho CRM username.

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.


https://accounts.zoho.com/u/h#setting/authtoken
Google
ZOHO Accounts
| Help | Sign Out
Welcome Michael
Home
Profile
Settings
Groups
User Profile Photo
Upload your Profile Photo
Preferences
Two Factor Authentication
Allowed IP Address
Authorized Websites
Linked Accounts
Active Sessions
Active Authtokens
Activity History
Close Account
Settings
Manage your preferences and access information.
Active Authtokens
Access and manage all the active secret auth tokens of your account authorized to different scopes.
Remove Selected
Token
Scope Name
Service Name
IP Address
Description
Generated Time
Action
77986d74baf4383913aedc387ec2f992 crmapi CRM 78.158.57.46 Nov 18, 2014 14:58:00 PM Remove
7dcf83a9e350c2f9f571cc60ec94855f crmapi CRM 78.158.57.46 Nov 18, 2014 15:10:55 PM Remove
d605cae0baec654c29188dc9d7a00fe3 crmapi CRM 78.158.57.46 Nov 18, 2014 15:04:42 PM Remove
e4345787585ff63f1988c80b228455f0 crmapi CRM 78.158.57.46 Nov 18, 2014 15:06:28 PM Remove

7.8 Diagnostics

Overview

The diagnostics section enables the Phone Manager diagnostics feature to be enabled.

Checking the **Diagnostics Enabled** option will, after a restart of the client, create logging information for this User in the folder:

%PROGRAMDATA%\Mitel\Mitel Phone Manager\logs\%USERNAME%

> This should only be enabled on a temporary short term basis as it can affect the performance of the client and consume significant amount of disk space.

If you are requested to provide logging information for the client by your support team then use the **Download logs** button as this will create a ZIP file containing all the logs and configuration information required on the Users desktop that can be emailed and analysed.

8 How To's

8.1 Importing Phone Manager v3 Personal Contacts

Overview

If the user has upgraded from Phone Manager v3 then their existing personal contacts can be imported. This is only supported if the users personal contacts have been stored locally (either in the %PROGRAMFILES% folder on the computer they are on, or in their "My Documents" folder and NOT centrally. If they are stored centrally then they will need to be migrated before upgrading. If these files are present then Phone Manager will prompt the user automatically when started to import.

Considerations before upgrade

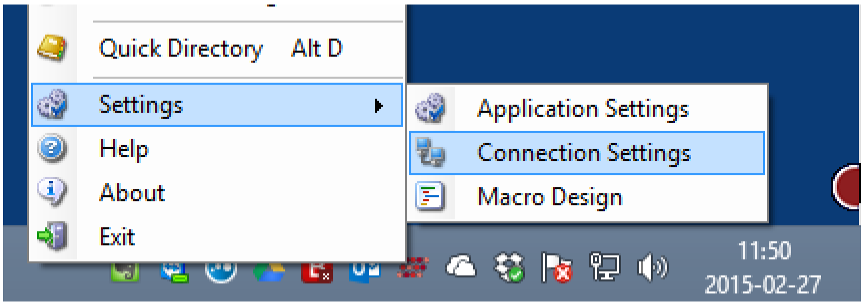
If the user already has version Phone Manager v3 installed on the PC then they had 3 places to save their personal contacts

1. C:\Users\[Username]\Documents\Application Data\Xarios\Phone Manager.
2. C:\Program Files\Xarios\Xarios Phone Manager\Phone Manager\ConfigFiles
3. On the Xarios Application Server.

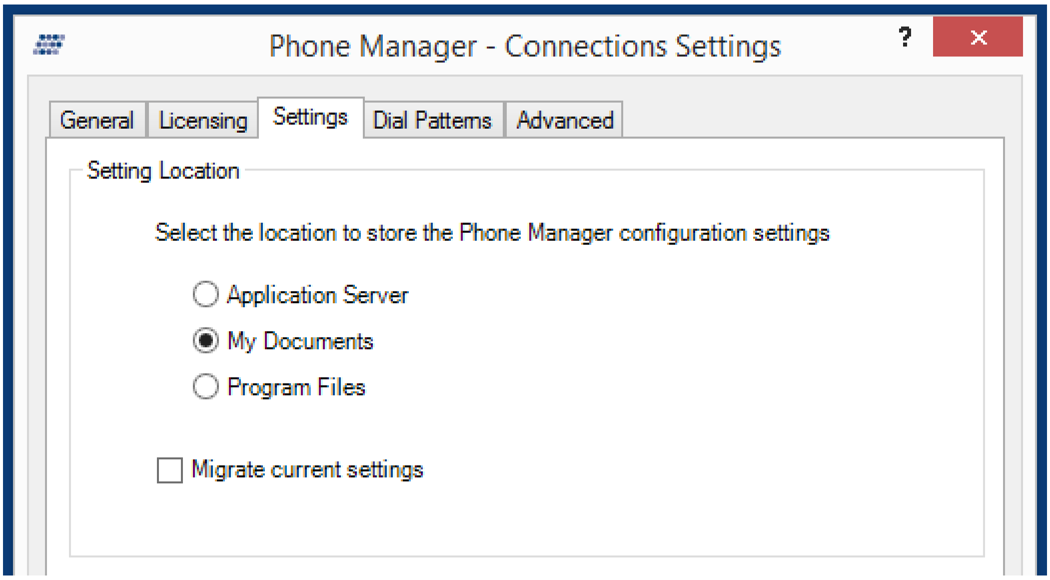
To be able to use the migration tool to import to your v4 and above client you need to make sure that the v3 client has personal contacts stored in either of the local locations i.e. options 1 and 2 above.

You can check where the client's directory is currently located in the v3 client by:

1. Right clicking on the Phone Manager Icon in the systray and select *Settings* -> *Connection Settings*.

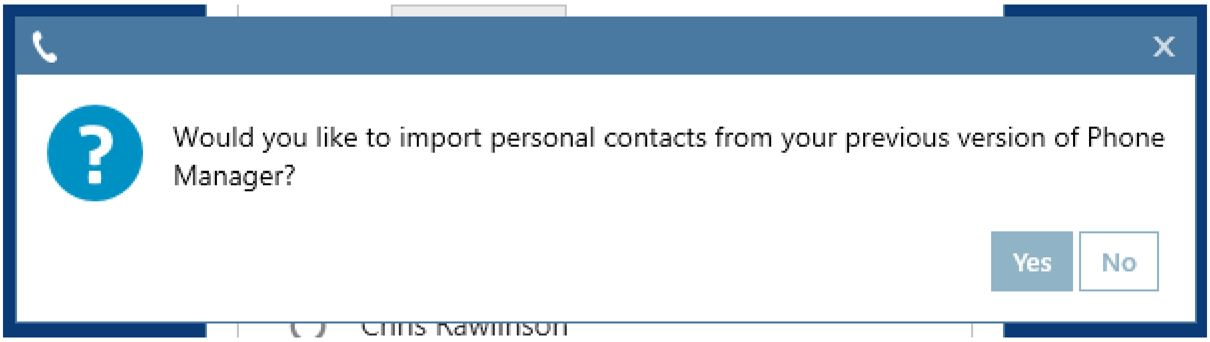


2. Select the *Settings* tab from the *Connection Settings* window.



From here will be able to tell where the contacts are located and if needed you can then migrate them to a local location. Once you have confirmed that the v3 personal contacts are stored locally you then need to install your v4 client.

Once installed open the v4 client and note the pop up box.



Click *Yes* and this will import all previously stored personal contacts. Click *No* and it will not import or prompt when next opened. Once complete you will get another pop up box to advise the number of contacts imported.

Whilst the import is taking place you do not get a progress bar but this allows you to carry on using your client.

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Powering connections

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