POWER TO RUN YOUR BUSINESS

sage

CRM Mid-Market Edition

Sage CRM MME 5.7

CTI Guide

ACCPAC International, Inc.
Publisher

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Chapter 3: Installing CRM CTI

Chapter 4: Enabling Users for CTI

Chapter 5: Customizing Phone Number Fields

Chapter 6: Working with CRM CTI

Chapter 1
Introduction

The main body of this guide is for Sage CRM MME implementers. The final chapter "Working with CRM CTI" is for users.

We assume that implementers have:

- A good understanding of Computer Telephony Integration (CTI) technologies, including ActiveX software.
- Familiarity with TAPI application program interface (API).
- A basic understanding of how CTI networks are set up and configured.
- Experience of implementing and troubleshooting CRM installations.

We assume that users are:

- Familiar with the use of a Web browser.

What is CRM CTI ?

CRM CTI provides CTI-enabled users with telephony functionality from their desktops, via the Sage CRM MME interface. Users can select any hyperlinked telephone number in the system to call that number, and any incoming calls are matched with contacts in the CRM system so that users can quickly view contact details while they talk, or even before they take the call.

Typical CTI Network Architecture

The following section provides an overview of a typical CTI network environment's technical infrastructure. It also provides details of what hardware needs to be in place before the implementer goes on site.

The following are the main elements of a typical CTI network:

- A private PABX switch.
- A Telephony Server.
- A Telephony Network.
- A local area network (LAN) server.
- A LAN.

The PABX switch controls the events and messaging over the Telephony Network, and the LAN server handles the day-to-day user-based network activities. The Telephony Server is a PC-based server that has an interface to the PABX switch and an interface to the LAN. This is the bridge that integrates telephony functionality with software on a LAN.

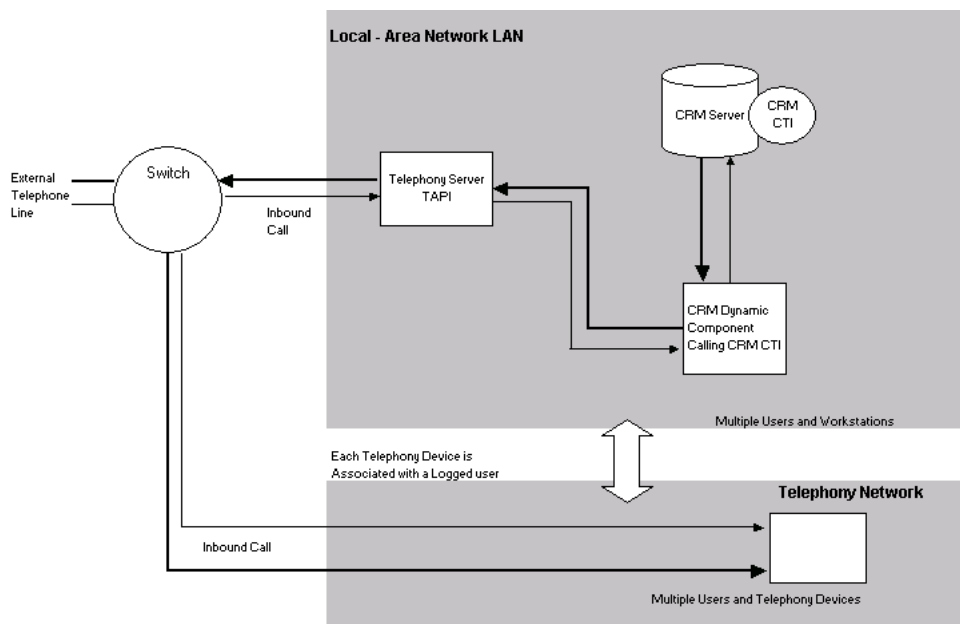
CRM/CTI Network Integration

The following are additional elements in a CRM/CTI network:

- CRM CTI installed on a server.
- A CRM CTI Component (this gets installed automatically).

The CRM Server interacts with the CRM CTI Component, which in turn interacts with the Telephony Server. When CRM CTI is enabled, every CTI enabled user of CRM has access to the CRM CTI Component. All inbound and outbound telephony activities are received or created by this component. In addition, the CRM CTI component calls the CRM server for the screen pop-ups, which present the caller ID and CRM contact information to the user.

The diagram below illustrates how CRM integrates with a typical CTI network.



Chapter Summary

The table below gives a summary of each chapter.

Chapter	Summary
Getting Started	An introduction to prerequisites and compatibility requirements for CRM/CTI integration.
Installing CRM CTI	Details on how to install CRM CTI.
Enabling Users for CTI	How to enable CRM users to use CTI.
Customizing Phone Number Fields	Guidance on how to configure fields to be telephone numbers.
Working with CRM CTI	How to make, take, and handle online calls with CRM CTI.

Chapter 2
Getting Started

In this chapter you will learn about:

- Prerequisites for setting up CRM CTI.
- The role of the Telephony Administrator.

Prerequisites for CRM CTI Implementations

Before an implementer goes on site, the following must be available to integrate CRM with a CTI network:

- A Private Automatic Branch Exchange (PABX) switch. All TAPI-compliant PABX switches are compatible with CRM.
- A Telephony Server that has been configured for all users who will use CRM CTI. All TAPI-compliant Telephony Servers are compatible with CRM.
- Telephony Server Provider (TSP) software installed on the telephony server. Specific software depends on the type of server.
- An operational CTI network that has been fully tested.
- Workstations configured for inclusion in the telephony network. For more details, please refer to the Chapter 4 "Enabling Users for CTI" in this guide.
- A list that specifies the TN number (analogous to the IP associated with the user) and DN number (user's extension number) for each CRM user so that they can be enabled for CTI on the CRM server. Please refer to Role of the Telephony Administrator (below) for more details.

Other requirements for CRM CTI include:

- A CRM CTI license.

Role of the Telephony Administrator

The Telephony Administrator is the person who administers a company's Telephony Server and Switch. He will also be responsible for ensuring that the CTI network is operational and has been fully tested before the implementer begins installing, CRM CTI. Please refer to "Prerequisites for CRM CTI Implementations" (above) for further details.

One important role of the telephony administrator is to set up telephony devices on the Telephony Server. This involves configuring the Telephony Server to associate each user in the local network domain with a particular telephone or telephony device. Each telephony device needs to be uniquely associated with a local telephony IP address. Each user needs to be associated with this address and assigned a TN number. A user list that specifies TN and DN numbers for each user needs to be compiled and made available to the CRM implementer.

Now you can…

- Explain the prerequisites for setting up CRM CTI.
- Outline the role of the Telephony Administrator.

Chapter 3
Installing CRM CTI

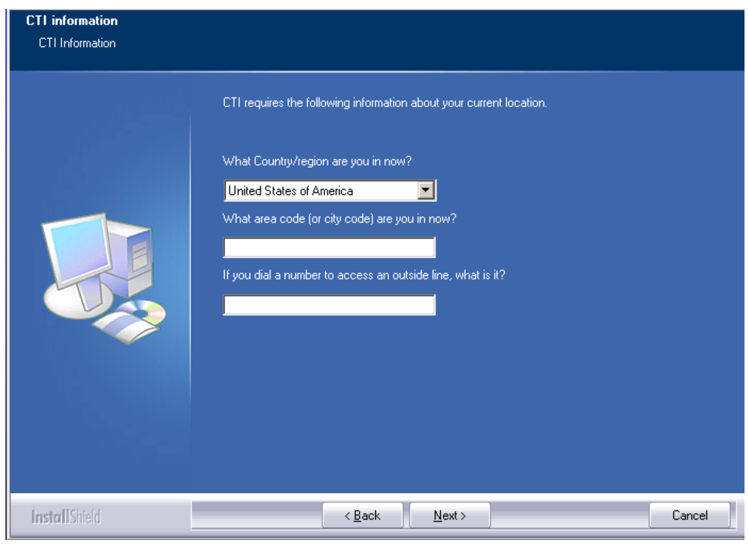
In this chapter you will learn about:

- Installing CRM CTI.
- Checking that system telephone settings correspond to CRM settings.

Installing CRM CTI

The installation process for CRM CTI is almost identical to the installation process for a typical Sage CRM MME installation. For instructions on installing Sage CRM MME, please refer to the *System Administrator Guide*. All of the screens and dialog boxes that display during the CTI installation are the same as the ones that display during the CRM installation, except the following one:

An additional screen is displayed after the Default Currency dialog box that prompts you for information on the telephony network setup.



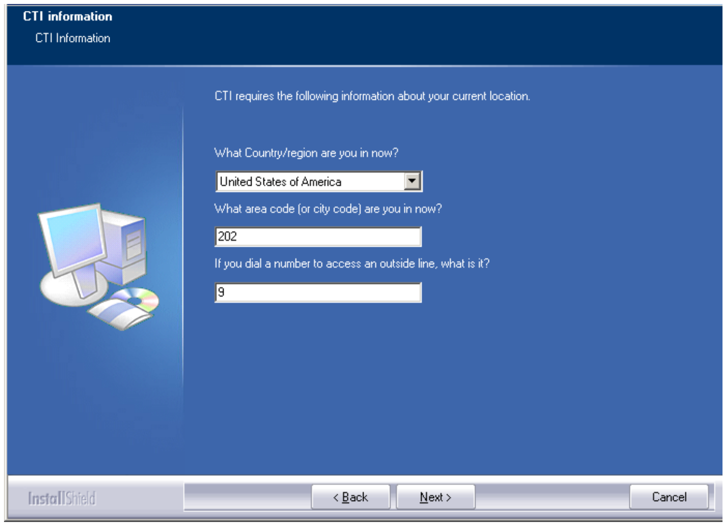
CTI Information dialog box

To complete the CTI information fields:

1. Select the country that you are located in from the What Country / Region Are You In Now list.
2. Type in your area or city code in the What Area Code (Or City Code) Are You In Now field.

3. In the If You Dial A Number To Access An Outside Line What Is It field, type the number that users typically dial to get an outside line.

   For example, let's say you are based in the US in Washington, DC. In addition, you typically dial "9" from your work telephone to get an outside line. You complete the fields on the CTI Information dialog box as follows.



CTI Information dialog box - example

4. Continue with the installation.

   Once CRM is installed, log on and select Administration | System | System Behavior. The details you specified during the installation are displayed in the CTI fields, and default values are automatically entered in the other CTI fields. You can change the values of the fields at any point if you need to.

CTI Configuration Settings

The table below describes all of the CTI fields on the Administration | System | System Behavior page.

Field	Description
External CTI Source	Not used for standard CTI installations.
External CTI Frame Height	Not used for standard CTI installations.
External Dial Prefix	The digit used in your organization to make a telephone call outside the company (external call), for example, 9 or 0. The number will already have been set up on the telephony server.
Default Country Code	The international country code for the country you are located in.
Default Area Code	The area or city code for the area or city you are located in.
Internal Number Length	The number of digits in your organization's extension numbers. This is set to 4 by default. This field enables CRM to determine whether an incoming or outbound call is an internal or external number.

Checking System Telephone Settings

Once CRM CTI is installed, you need to make sure that the server machine telephone settings correspond with the information you specified during the CTI install.

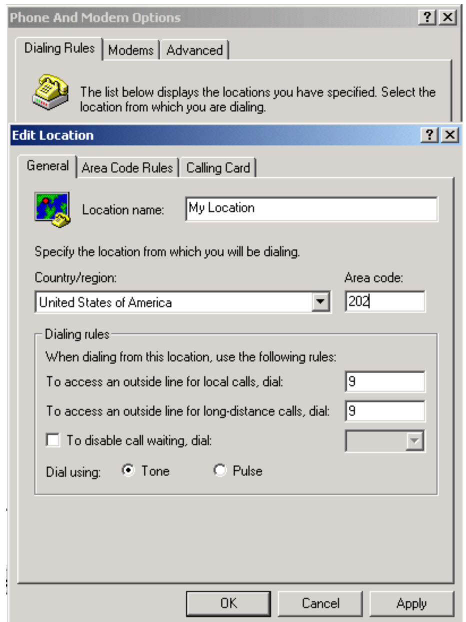
To check the telephone settings on the server machine:

1. Select Start | Settings | Control Panel, and click on the Phone and Modem Options icon.

2. Highlight My Location and select the Edit button.

3. The settings displayed on the Edit Location dialog box should correspond with the settings you specified during the CRM install. If they do not, you can change them.

   This example displays the settings for a company in Washington, DC where "9" is used as the external dialing prefix.



Edit Location dialog box

5. Depending on your location, you may need to specify (or verify) area code rules. To do this, select the Area Code Rules tab on the Edit Location dialog box, and select the New or Edit button, depending on whether you are specifying new rules or checking previously set up rules.

6. Select OK to close the Area Code dialog box and then OK to close the Edit Location dialog box.

Now you can...

- Install CRM CTI.
- Check that system telephone settings correspond to CRM settings.

Chapter 4
Enabling Users for CTI

In this chapter you will learn about:

- Configuring users for CTI.
- Setting up the TAPI server for CTI users.
- Checking user telephony settings.

Configuring Users for CTI

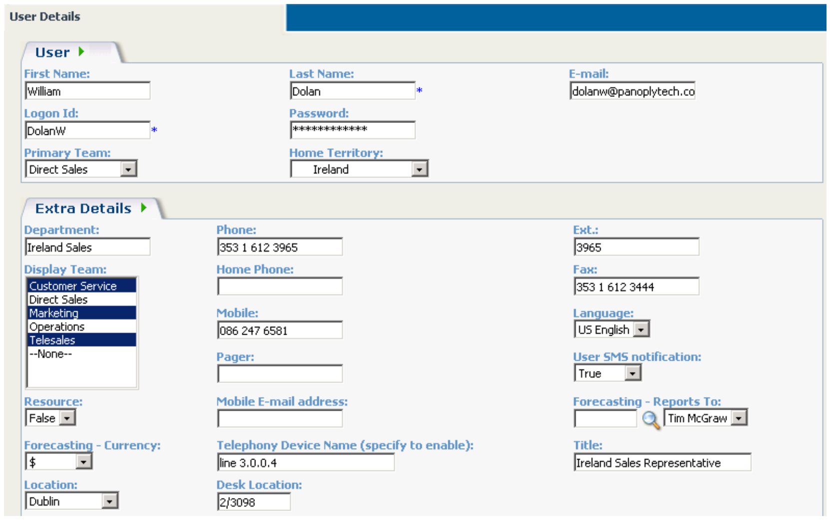
Once you have configured the CRM server, the next step is to configure users for CTI. This involves specifying a telephony device (or TN number) on the CRM server for each user who requires CTI.

To configure a user for CTI:

1. Select the Administration | Users | Users.

   The Users Find page is displayed.

2. Find the user you want to enable CTI for, and open the User Details page for the user.
3. Select the Change button.
4. Type "line" followed by the user's TN number in the Telephony Device Name (Specify To Enable) field. Note that "line" must be lowercase.



CTI fields on the User Details page

5. Ensure that the user's telephone number is entered correctly in the Phone field.

6. Select the Save button.

   The user is enabled for CTI.

Making the TAPI Server Accessible to Users

Once a user has been enabled for CTI, you need to ensure that the following command is run on the user's desktop or laptop so that the TAPI server is accessible:

```
TcmSetup /c <TapiServerName>
```

To run the command on the user's desktop or laptop:

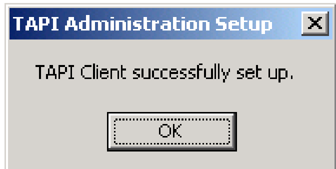
1. Select Start | Run, and type **cmd**.

2. Type the command in the command prompt. If the server name is "TelephoneServer" for example, type the following command:

   ```
   TcmSetup /c TelephoneServer
   ```

3. Press Enter.

The command is run, and the following message is displayed to inform you that it was successful.



4. Select OK.

   You need to repeat the above steps on each CTI-enabled user's machine.

Checking User Telephone Settings

You need to make sure that the telephone settings on the user's computer correspond with the server telephone settings. Please refer to the "Checking System Telephone Settings" section in Chapter 3: Installing CRM CTI for more information.

Now you can...

- Configure users for CTI.
- Set up the TAPI server for CTI users.
- Check user telephony settings.

Chapter 5
Customizing Phone Number Fields

In this chapter you will learn about:

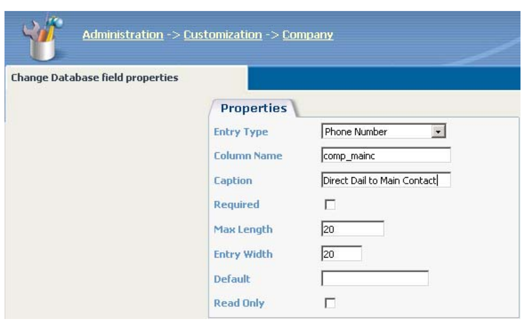
- Configuring fields to be telephone numbers.

Field Customization

When a user has been enabled for CRM CTI, all phone number values in CRM display as hypertext links for the user. However, you can also create new phone number fields or configure any text field in CRM to be a telephone number. Once a field is converted to this type of entry, it will automatically be displayed as a hyperlinked value on the screens in which it is used. This allows CTI-enabled users to make outbound calls by clicking the value of the field, which is set as a telephone number. As with any text field, you can edit phone number fields.

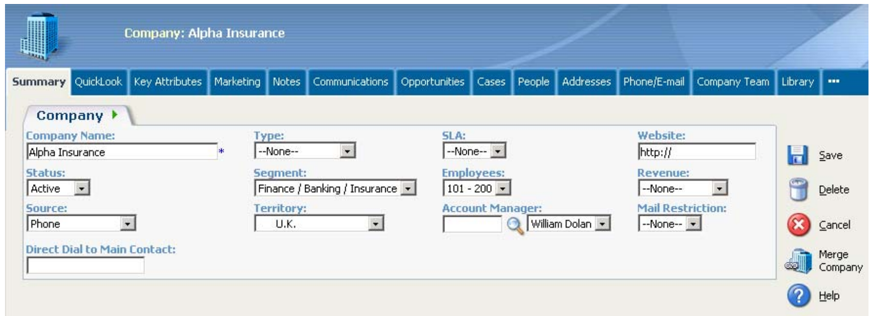
To convert a text field to a phone number field:

1. Click on the Administration | Customization | <Entity>.
2. Select the Fields tab.
3. Click the hypertext link of the field you want to convert.
4. Change the Entry Type to Phone Number and click the Save button.



Change Database Field Properties page

In the example below, a new Phone Number field called Direct Dial To Main Contact was added to the Company Entry screen.



Company entry screen with new field

Once a phone number is entered in the field, it immediately becomes activated as a CTI field.

Note: Users can enter phone numbers in Phone Number fields in any format. CTI ignores all non-numerical characters and spaces when the hyperlinked number is selected by the user and dialed from CRM.

Company Summary page with new field

Now you can...

- Configure fields to be telephone numbers.

Chapter 6
Working with CRM CTI

In this chapter you will learn about:

- Logging onto CRM CTI for the first time.
- CTI user preferences.
- Making an outbound call.
- Taking an inbound call.
- Handling active calls.

Overview

CRM CTI allows users to view information about incoming calls and perform various telephony functions. The features of CRM CTI include:

- The option to hide the Call screen if there are no active calls.
- Auto caller identification (caller ID).
- The option to go directly to the relevant Company or Person screen while the call is active.
- Auto dial-out via hyperlinked phone numbers.
- The option to transfer and put calls on hold at any time.

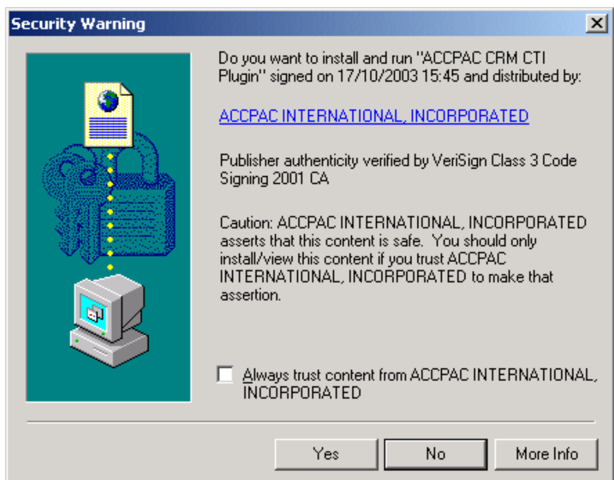
Logging On

When you log onto CRM for the first time having been CTI-enabled, you are prompted to download the CTI plugin.

To download the CTI plugin:

- Follow the instructions provided on-screen.

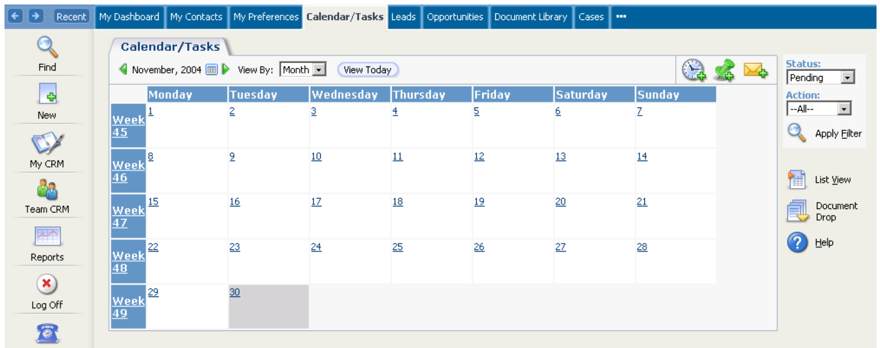
  You only need to do this once. If you receive an upgrade, or change machines, you are prompted to download the plugin.



Security Warning dialog box

CTI User Preferences

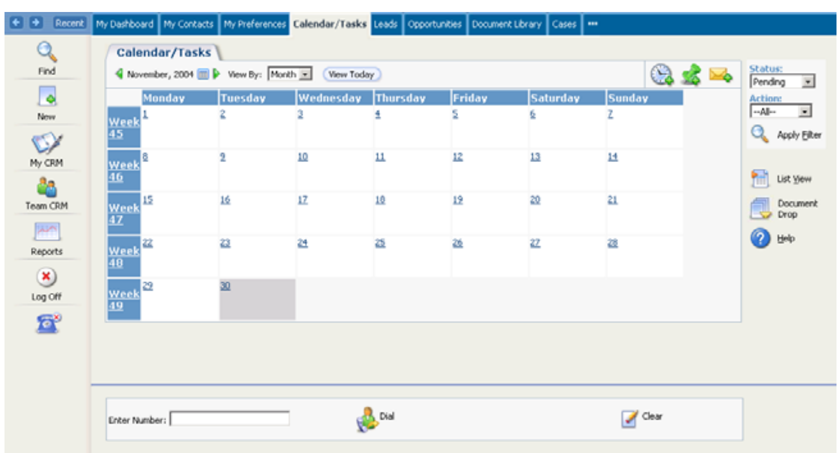
By default, the Call screen is not displayed until you select the Telephone menu button or when a call is coming in. However, you have an option to display the screen at all times.



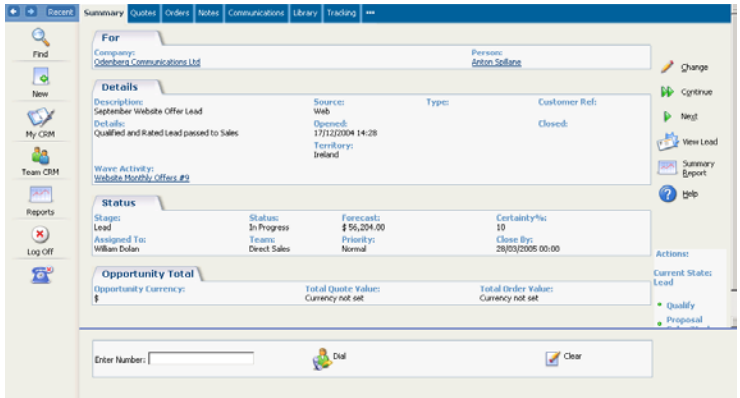
To specify that you want the Call screen to be displayed at all times:

1. From My CRM, select the My Preferences tab.
2. Click on the Change action button.
3. Set the Hide CTI On Idle option to No.
4. Select Save.

Once you set the Hide On Idle option to No, and you select the Telephone menu button, the Call screen remains at the bottom of all screens, even if there are no active calls. In addition, the Telephone menu button displays a red X symbol.



My CRM work area showing Call screen

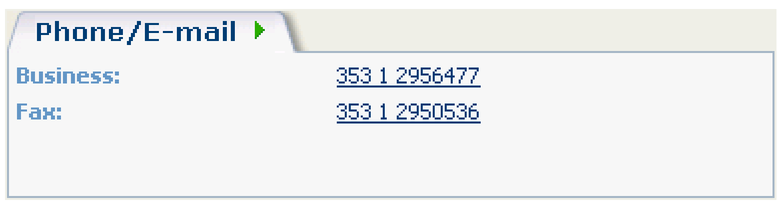


Opportunity context with Call screen active

Making an Outbound Call

Once you have been enabled as a CTI user:

- All phone numbers in CRM display as hyperlinks.



Company Summary Phone E-mail tab

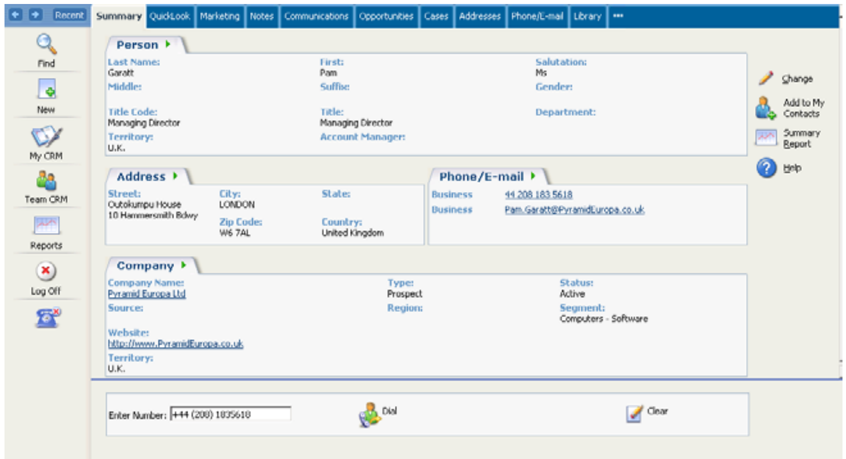
- Phone numbers in the context area of the screen are also displayed as hyperlinks.

Company Context Area

To make an outbound call:

- Click on the hyperlinked phone number you want to call. For example, click on the Phone hypertext link in the context area.

  If you do not have it set to be displayed at all times, the Call screen is then displayed with the number you clicked on in the Active Calls field.



Company Summary page showing Call screen

The Active Call field shows:

– The full telephone number you selected, including Country Code and Area Code.

– The word "Dialling" to indicate that the number is being dialed.

You can stop dialing at this point if you wish.

To stop dialing:

- Click on the Hangup button.

  The Call is ended. If you do not have it set to be displayed at all times, the Call screen is hidden.

Making a Call to a Number that is not in CRM

Note. Although numbers in Phone Number fields can include symbols and spaces, this is not the case when you enter a number on the CTI Call screen. When entering a phone number on the CTI screen, either:

- Type the "simple" number—you can include spaces but not symbols. For example **44 161 5527789**.

Or

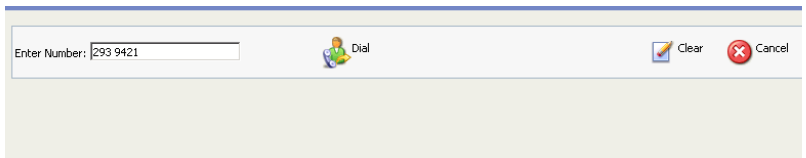
- Type the number in canonical format—that is, **<plus sign> <country code> <area code in brackets> <number>**. For example, **+ 44 (161) 5527789**

To make a call to a number that is not in the CRM system:

1. Select the Telephone menu button to display the Call screen. Note that if the Hide CTI On Idle Option is set to No in your User Preferences, there is no need to do this because the screen is already displayed.

2. Type the number you want to call in the Enter Number field. For example, include an international code, a country code, and an area code if you are dialing an international number. If you are dialing a different area code within the same country, type the code followed by the number. However, if you are dialing a local number, just type the phone number. Similarly, dialing an extension number simply requires you to input the extension.

   This example shows how to enter a local phone number.

   This example shows how to enter a number in a different area code but the same country.

   These two examples show how to enter a UK phone number in simple format and in canonical format.

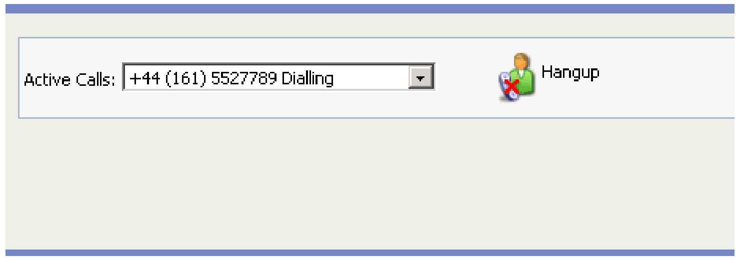
   Phone number in "simple" format

   Phone number in canonical format

3. Select the Dial button.

   The number is displayed in the Active calls list.

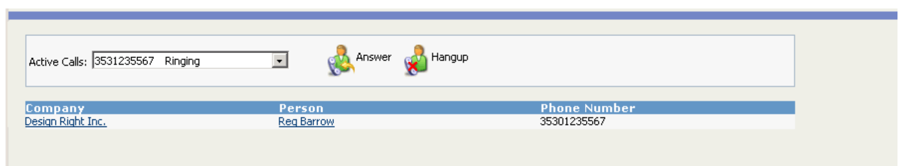


If you want to stop dialing, select Hangup. If you do not have it set to be displayed at all times, the Call screen is hidden at this point.

Taking an Inbound Call

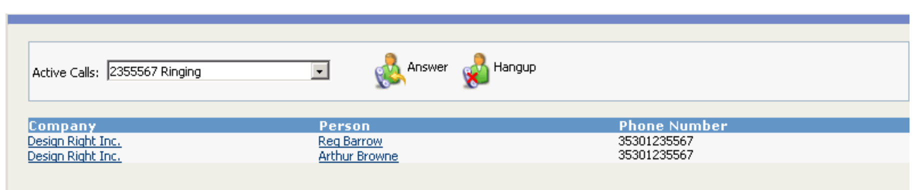
When an inbound call is directed to your extension number:

- The phone number is displayed in the Active Calls list followed by the word "Ringing" to indicate that the call is coming in.
- If the incoming call number matches a company or person in the system, the contact is listed underneath the Enter Number field.



My CRM work area showing Call screen

- If the incoming call matches more than one contact in the system, all the contacts are listed. **Note:** A matching number is any number in the contact database that has the same number as the caller Id or is a prefixed match against the caller Id.



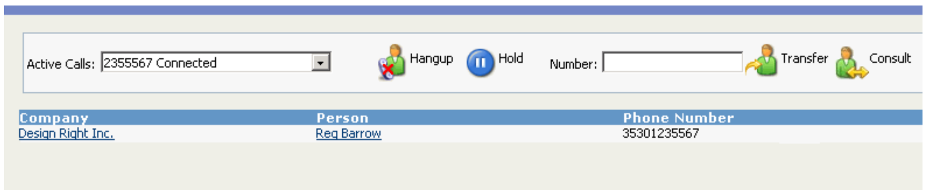
List of matching numbers

- If the incoming call is from a user in CRM (that is, a colleague) as opposed to a contact, the word "Internal" is displayed on the list.
- If you want to view contact details, you can click on the Company or Person hypertext link to view the Summary page for the Company or Person contact.

To answer the inbound call:

- Click on the Answer button or pick up the receiver.

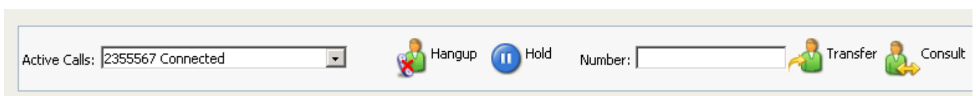
  When you do this, the incoming call number is displayed on the Active Calls list followed by the word "Connected", and additional buttons become available, which you use to handle the call. The buttons are described in detail in the next section.



Connected call

Handling Connected Calls

When you answer a call, or if a call you make is connected, you can do the following from the connected call screen:



Connected call screen

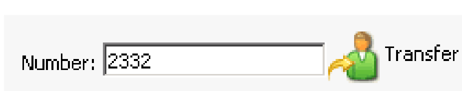
Hangup. Speak to the caller, and when you have completed the call, select Hangup to end the call.

Hold. Put the caller on hold while you deal with a query by selecting the Hold button. When you do this, the Unhold button is displayed.

Unhold. Resume a call that is on hold. When you select the Unhold button, the Hold button becomes available again.

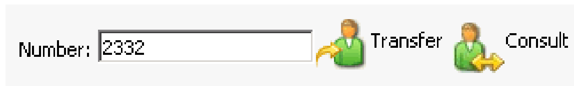
Transfer. Transfer the call directly to another extension number. When you do this, the call goes straight through the extension number you specify, and you are hung up. To transfer a call directly to a colleague:

- Type the extension number you want to transfer the call to in the Number field, and select the Transfer button. The call is transferred directly to your colleague.



Consult. Consult with a colleague before you transfer a call to them. To do this:

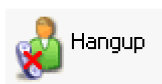
- Type your colleague's extension number in the Number field, and select the Consult button.



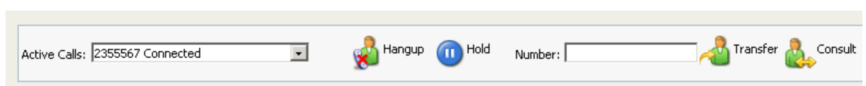
When you do this, your colleague's number is dialed and if they pick it up, you are presented with two buttons Complete Transfer and Hangup. Talk to you colleague, for example, ask them are they free to take the call.

  – If they can take the call, select the Complete Transfer button to transfer it to them.

  – If they are not available to take the call, select the Hangup button to return to the call.



You then need to select the Unhold button to speak to the caller. Once you do this, you are returned to the connection call screen where all of the call options become available again.

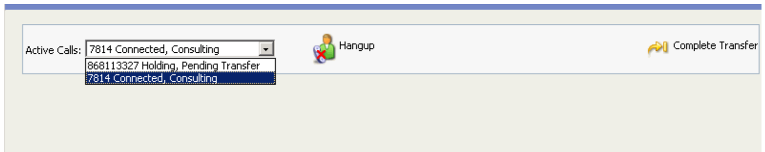


Active Calls List

The Active Calls list displays information about the current status of the call. For example,

- The list is empty if you have no active calls.
- It shows the number you are dialing, followed by the word "Dialing" if you are making an outbound call.
- It displays the incoming call number followed by the word "Ringing" when a call is coming in.
- When answer an incoming call or are connected to a number you dialed, it shows the number followed by the word "Connected".
- If you select the Transfer or Consult button when a call is connected, the list displays the status of the external call, for example "Holding, Pending

Transfer", as well as the status of the number you are transferring to or consulting with, for example "Connected, Consulting".



Active Call List

Now you can...

- Log onto CRM CTI for the first time.
- Explain the CTI user preferences.
- Make an outbound call.
- Take an inbound call.
- Handle active calls.