# **CRM Connect**

PC User Guide

V0.1

## 1 Introduction

#### 1.1 Overview

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

# 2 Requirements

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

#### 2.1 Hardware and Software Requirements

#### 2.1.1 PC Client Minimum Hardware Requirements

- 1.8 GHz Pentium-class processor
- 2GB Memory
- 1GB free hard drive space
- SVGA display
- Keyboard and mouse
- Network adapter connected to a TCP/IP network

#### 2.1.2 PC Client Supported Operating Systems

- Windows 7 Professional
- Windows 8 (Desktop mode)
- Windows 10
- 32 bit and 64 bit versions

#### 2.1.3 Web Dialing Supported Browsers

- Internet Explorer (PC) 11.0 \*
- Google Chrome (PC) 47.0
- Mozilla Firefox (PC) 38.5.and 43.0
  - \* Microsoft security patch MS14-080 stops web-page dialing working with IE11.

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

#### 3 Client Download

When a CRM Connect is enabed for a user by Spark or an admin via the administration portal, the client installation file can be downloaded from a user's user portal.

#### 3.1 Log into the user portal

Go to the user portal URL provided by your Service Provider in your browswer and enter your username and password.

<b>₩</b> Spark∝			
Username			
Password			
English (Australia)			
Sign In			
Forgot Username? Forgot Password?			
22.7.4			

## 3.2 Go to My Apps/CRM Connect

Go to the *My Apps* tab at the top then go to *CRM Connect*. Click the *Download* button for your appropriate computer. A file will be downloaded to your computer. Depending on your computer configuration you may be asked if you want to Save the file.

🔆 Spark			olga reutskiy osoo1297 Extension 1297 Or
Qu <sup>9</sup> Voicemail	After you successfully download one or more of the following applications, sig	In the each application using usemanne: Ogugepark.co.az. Your password will be the same one used to sign in to this website.	
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() Call Settings		CRM Connect	
Directory			
My Apps	Mobile Software	Brand Stock Model Citert Deveload regione a state Maria. ("Opi Link") to r.00 (Aps Store)	
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# 4 PC Client Installation

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

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

CRM Connect Setup	
	Welcome to the CRM Connect Setup Setup will guide you through the installation of CRM Connect. It is recommended that you dose all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer. Click Next to continue.
	Next > Cancel

Review the End-User License Agreement and hit the *I Agree* button to continue. You must agree to the End-user License Agreement to complete the installation. You may hit the *Cancel* button to exit the installation process.

CRM Connect Setup
License Agreement Please review the license terms before installing CRM Connect.
Press Page Down to see the rest of the agreement.
END-USER LICENSE AGREEMENT - Go Integrator
Please read this agreement (the Agreement) carefully before using any component of th Integrator product set (the Software).
If you accept the terms of the agreement, click I Agree to continue. You must accept the agreement to install CRM Connect.
Nullsoft Install System v2.46.5-Unicode <a>  <a>  <a>Back</a></a> I Agree Cancel</a>

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



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



### 5 Login Details and Initial Configuration

Once the installation has finished, the user will need to enter their Cloud Phone user credentials and their CRM user account credentials.

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

#### 5.1 Open the Credentials Window

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



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

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

# **Configuration:**

🔅 CRM Connect - Configuration			-		$\times$
$\equiv$ general $\land$	Telephony				?
Telephony					
Interface	Method:	HTTP(S) protocol			$\sim$
Dialing	Server:	North America			$\sim$
& EVENTS ^	<u>U</u> sername:				
Availability	Password:				
Call events					
o INTEGRATION ^					
Salesforce CRM					
Google Contacts					
Microsoft Outlook					
(Add new)					
? ABOUT ^					
Versions					
Log					
		19			
		H Save	R.	Cancel	

# 5.2 Telephony Configuration

You must first configure the *Telephony* section by selecting the server and entering the user's Cloud Pone client credentials.

- Method: Choose either HTTP(S) Protocol or UC One.
  - HTTP(S) Protocol used in most instances where
  - UC One Choose this method if the user does not have physical phone device and is only using a Cloud Phone applications for their primary device. The Cloud Phone incoming call pop-up is suppressed and only shows the CRM Connect preview or phone screen if enabled.
- <u>Server</u>: Select "Australia"
- <u>Username</u>: This is the Cloud Phone username Your Username takes the format: <username>@<domain> For example, user.one@acme.com
- <u>Password</u>: This is the Cloud Phone user password.

# 5.3 CRM Integration Configuration

The user will also need to know which CRM System they are using and their log in credentials for that system.

Pick the appropriate CRM system to integrate. Click the Help icon in the upper right corner to be taken to a web page showing instruction for configuring the CRM Connect client with the specific CRM system.

# 5.4 Other Options



Home Tab	
Phone	Opens a pop-up window that allows the entering of a number to dial or to pick-up via the Click to Dial function to your phone
Presence 2	Opens a pop-up window that enables the search and selection of users to monitor their phone presence.
Call Settings	Allows for the control of Call Forwarding Always and Do Not Disturb features
Address Book 🗾	Opens a pop-up window that enables the search and selection of users in your Site and your CRM contact directory to get phone details and make a call to.
Call History	Shows your Cloud Phone call history from the basic call log.
Configuration	Opens a screen where
Quick dial box (Enter text or a number here to search)	Type a number here and press Enter to make an immediate phone call
Exit 된	Use this to unload the software as an active application.

Help ?	Opens a web browser to the on-line help pages.
Recent 🥙	Quickly see recently dialled numbers and click to redial them

	Allows the configuration of specific Cloud Phone features for			
Features	the user including Call Fowarding Always and Do Not Disturb			

# 5.5 Menu Help

Detailed instruction and information for each tray menu item can be found in the context sensitive help in the client itself or at the following URL http://crmconnect.broadcloudpbx.com/help

# 6 Troubleshooting

#### 6.1 Installation

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

# 6.2 Running CRM Connect

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

# 6.3 Login Process

CRM Connect requires you to enter the correct Username and Password and have a current CRM Connect license applied to the user.

• If the user does not have the required license or their username/password is wrong a pop-up will occur with the error message: "Telephony Device The remote server returned an error: (401) Unauthorized.



- Check to make sure the user has the CRM Connect license applied in the admin portal.
- Also make sure the user has the correct username and password entered correctly in the CRM Connect client.

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

# 6.4 Integration with CRM Software and Other Features

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

# 6.5 Taskbar / System Tray Icon and Preview Window Notification Management

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

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

🖉 🖓 🗝 🔚 « All Control P	ane 🕨 Notification Area	Icons 👻 🍫 Search Control Pane	el 🔎
Select which If you choose to To view hidden	icons and notification hide icons and notification icons at any time, click the	ons appear on the taskbar 15, you won't be notified about changes or u arrow next to the notification area on the tas	₽ pdates. ;kbar.
Icons Con CRI	nnect M Connect: Off hook	Behaviors Show icon and notifications	E
P> Act Solv Full	ion Center re PC issues: 1 message ver y charged (100%)	Show icon and notifications	
Turn system ico Restore default i Maways show	ns on or off con behaviors all icons and notifications	on the taskbar	
		OK Car	ncel

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

	Call: Ringing X	
	. 9186545000 918-654-5000 ▶ 918-881-12 Susan Robinson	
ૣ . 9186	545000 is calling	×
	Links ဳ 🛆 📴 🐑 🕠 🛞 👔	1:33 PM 2/11/2015

You can disable the notifications in either application to rectify this or move the CRM Connect notification to another location on the desktop.

To disable the CRM Connect notification, navigate to the Configuration panel, select Events/Call Events tab from the menu on the left and change the action in the dropdown for "On ringing", "On answer", or "On outbound" to No Action and then hit Save.

CRM Connect - Configuration			? 💌
🚮 General	Call events		\$
<ul> <li>Telephony</li> <li>Interface</li> <li>Dialing</li> </ul>	Select the action to On ringing:	take place when calls happen	<b></b>
Events	On answer: On outbound:	Show contact No action	
<ul> <li>Availability</li> <li>Call events</li> </ul>	Select the sounds to On ringing:	play when calls are received	
Integration       Integration <t< td=""><td>Call waiting:</td><td>Mute speaker when call in progress</td><td></td></t<>	Call waiting:	Mute speaker when call in progress	
About  Kersions  Conservation  About  About	Use following extern	al programs when selected events occur Program	Parameters
	Add	📝 Edit 🛛 🎉 Remove 🛛 😽 Import	Export
		Save	Cancel