

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.

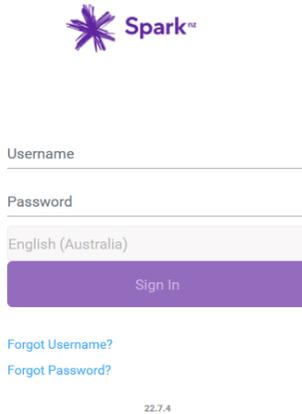
Some anti-virus software can cause problems when installing other software so consider temporarily disabling your anti-virus application for the duration of this installation; remember to enable it again as soon as the installation is complete.

3 Client Download

When a CRM Connect is enabled 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

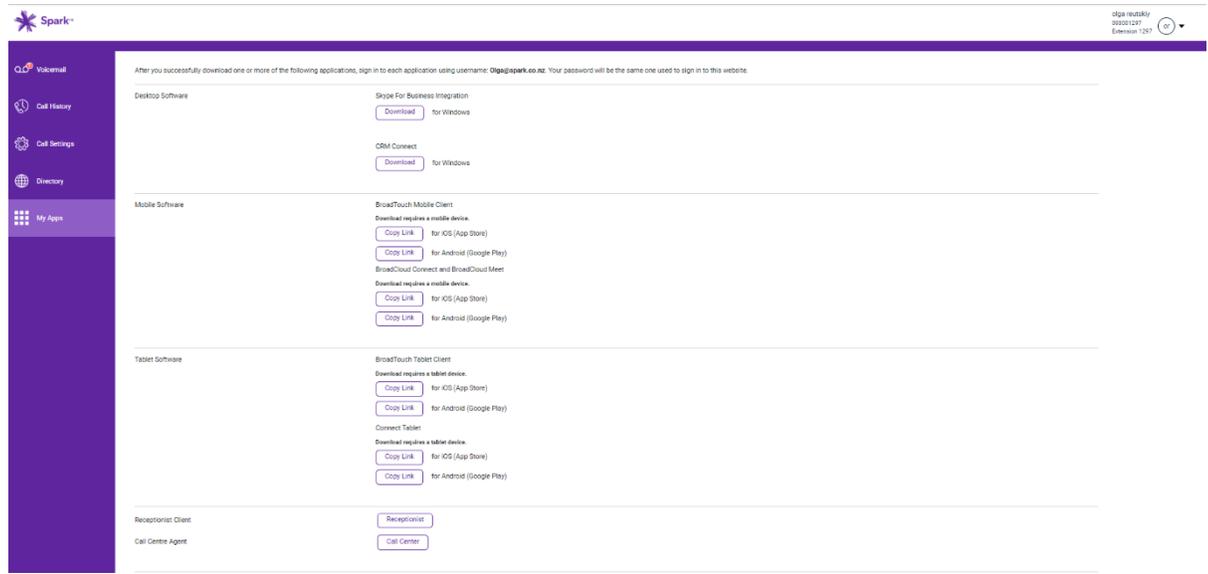
Go to the user portal URL provided by your Service Provider in your browser and enter your username and password.



The image shows the Spark user portal login interface. It features the Spark logo at the top left. Below the logo are two input fields: 'Username' and 'Password'. A dropdown menu is set to 'English (Australia)'. A purple 'Sign In' button is positioned below the password field. Below the button are two links: 'Forgot Username?' and 'Forgot Password?'. At the bottom center, the version number '22.7.4' is displayed.

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.



The image shows the 'My Apps' page in the Spark user portal. The left sidebar contains navigation options: 'Voicemail', 'Call History', 'Call Settings', 'Directory', and 'My Apps' (which is highlighted). The main content area displays a list of applications with download links. A message at the top states: 'After you successfully download one or more of the following applications, sign in to each application using username: [diga@spark.co.nz](#). Your password will be the same one used to sign in to this website.'

Category	Application	Download Link
Desktop Software	Skype For Business Integration	Download for Windows
	CRM Connect	Download for Windows
Mobile Software	BroadTouch Mobile Client	Download requires a mobile device.
		Copy Link for iOS (App Store)
		Copy Link for Android (Google Play)
	BroadCloud Connect and BroadCloud Meet	Download requires a mobile device.
		Copy Link for iOS (App Store)
		Copy Link for Android (Google Play)
Tablet Software	BroadTouch Tablet Client	Download requires a tablet device.
		Copy Link for iOS (App Store)
		Copy Link for Android (Google Play)
	Connect Tablet	Download requires a tablet device.
		Copy Link for iOS (App Store)
		Copy Link for Android (Google Play)
Receptionist Client		Receptionist
Call Centre Agent		Call Center

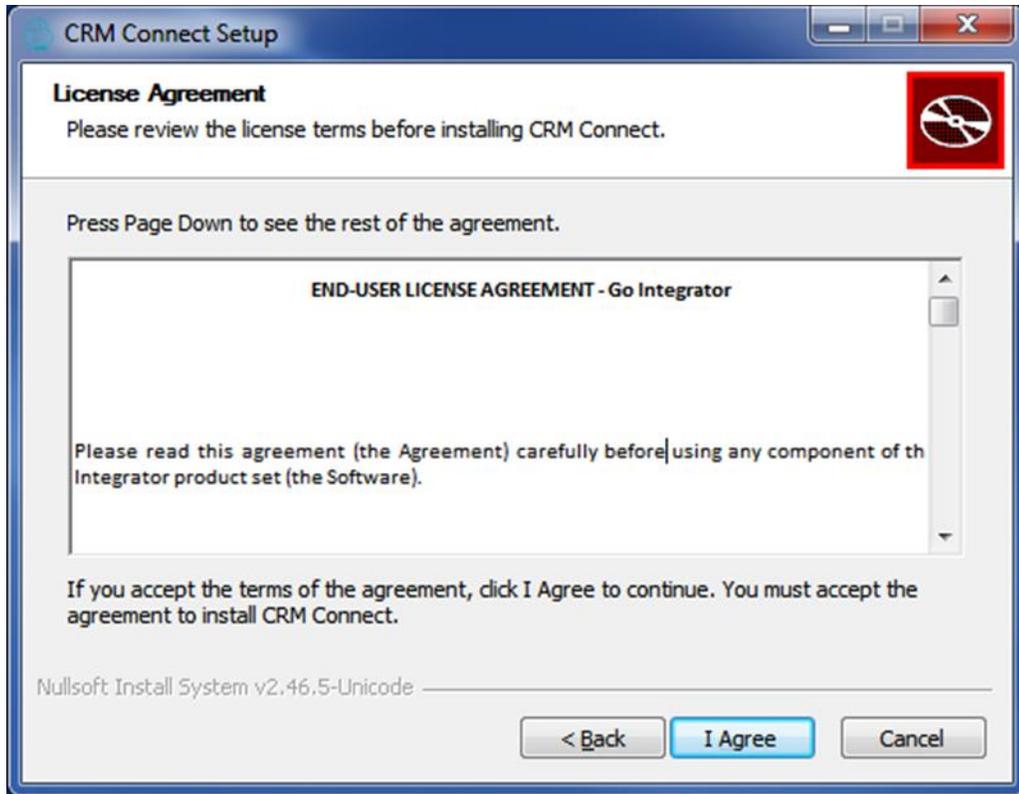
4 PC Client Installation

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

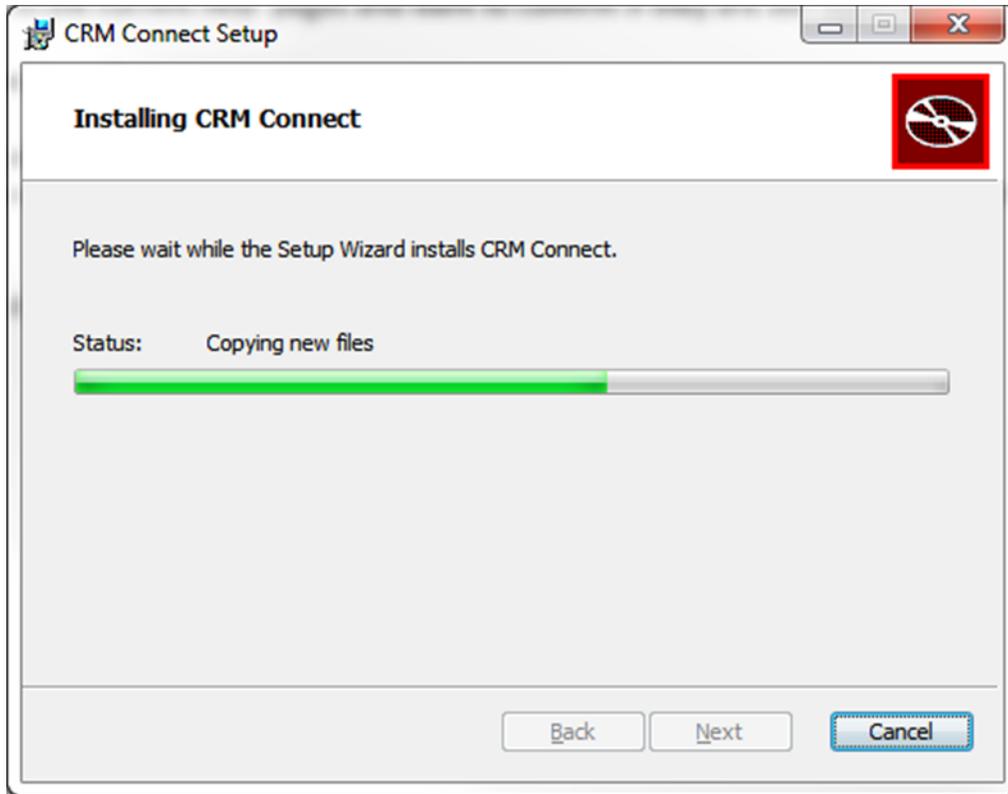
To begin installing CRM Connect, double-click the 'CRMConnect.exe' file and click the 'Install' button.



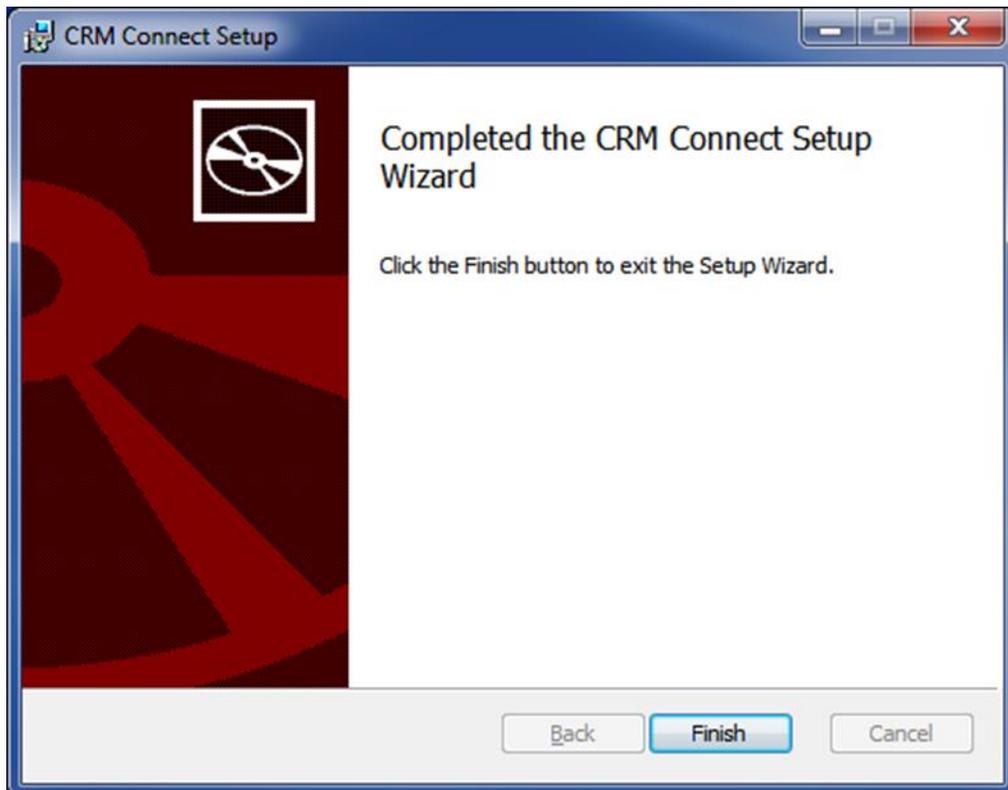
Review the End-User License Agreement and hit the *I Agree* button to continue. You must agree to the End-user License Agreement to complete the installation. You may hit the *Cancel* button to exit the installation process.



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.



5.2 Telephony Configuration

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

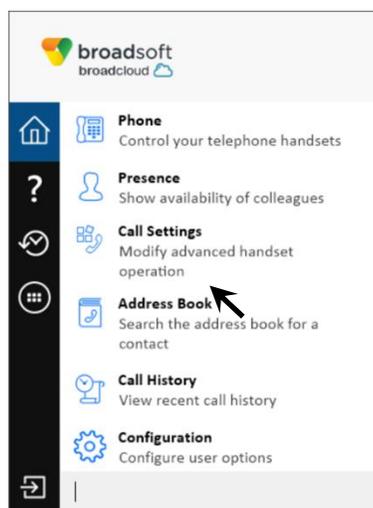
- **Method:** Choose either HTTP(S) Protocol or UC One.
 - HTTP(S) Protocol – used in most instances where
 - UC One – Choose this method if the user does not have physical phone device and is only using a Cloud Phone applications for their primary device. The Cloud Phone incoming call pop-up is suppressed and only shows the CRM Connect preview or phone screen if enabled.
- **Server:** Select “Australia”
- **Username:** This is the Cloud Phone username
Your Username takes the format: <username>@<domain> For example, user.one@acme.com
- **Password:** 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 	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 <small>(Enter text or a number here to search)</small>	Type a number here and press Enter to make an immediate phone call
Exit 	Use this to unload the software as an active application.

Help 	Opens a web browser to the on-line help pages.
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Recent 	Quickly see recently dialled numbers and click to redial them
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Features 	Allows the configuration of specific Cloud Phone features for the user including Call Forwarding Always and Do Not Disturb
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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.

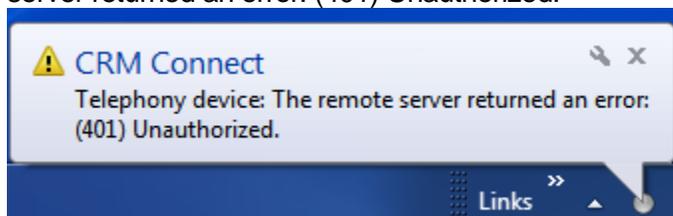
6.2 Running CRM Connect

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.

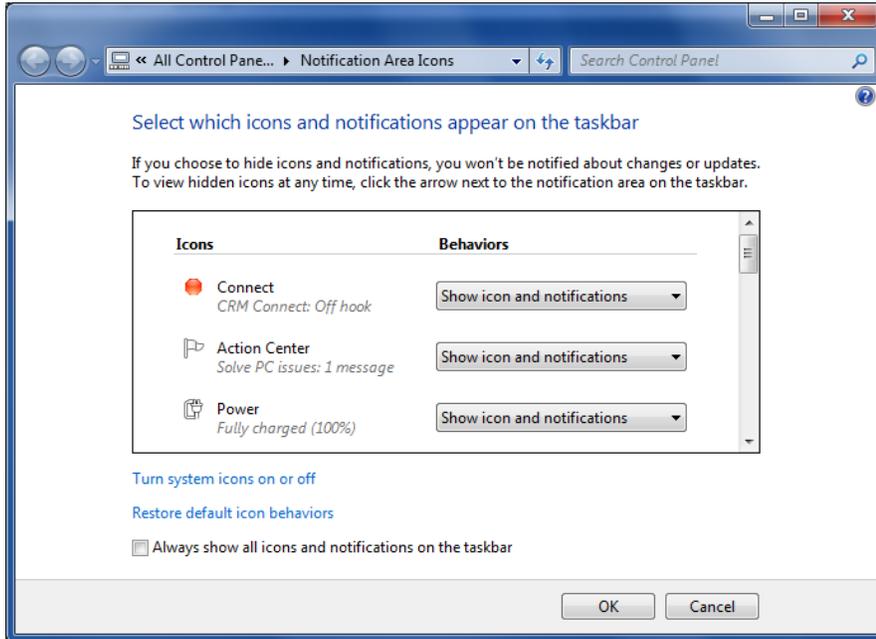
6.4 Integration with CRM Software and Other Features

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.

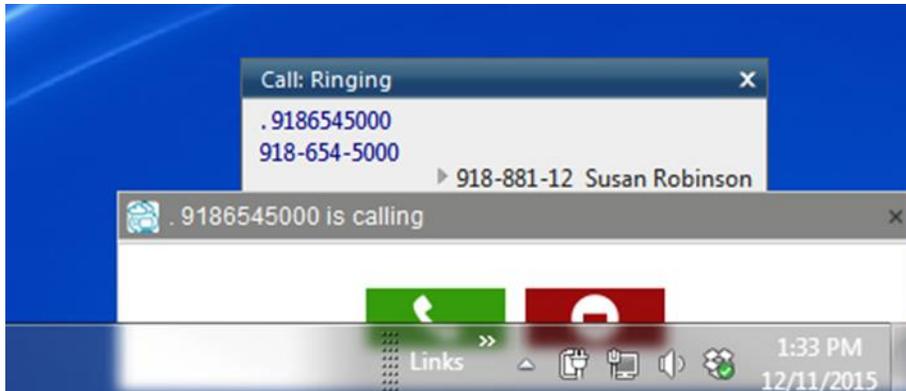
6.5 Taskbar / System Tray Icon and Preview Window Notification Management

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:



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:



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.

