Cloud Phone CRM Connect PC User Guide

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Overview

Cloud Phone CRM Connect is a BroadCloud application for desktop that integrates leading CRM applications into Cloud Phone. CRM Connect works in conjunction with the user's and CRM software to provide a productivity enhancing integrated service. This document details how to install and begin using CRM Connect.

Requirements

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

Hardware and Software Requirements

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

PC Client Supported Operating Systems

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

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.

Client Download

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

Log into My Phone

Go to the My Phone URL provided by your Service Provider in your browser and enter your username and password.
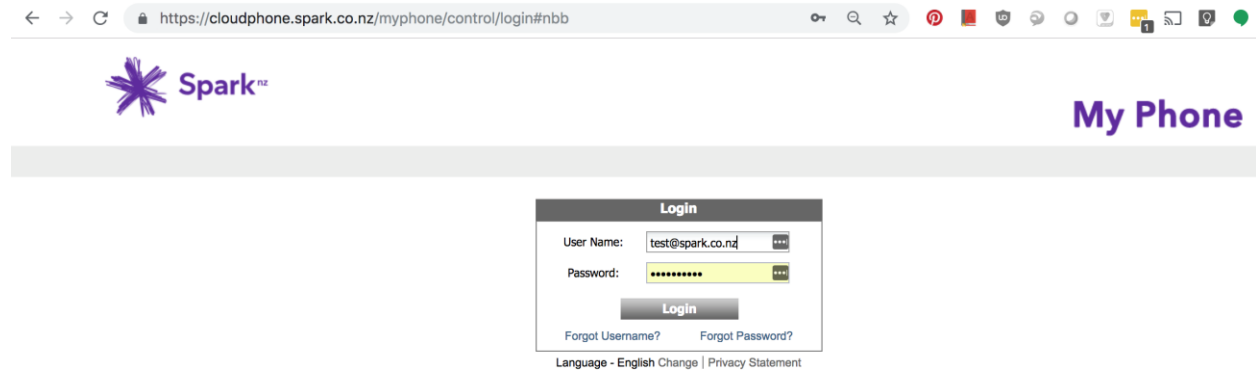
Go to My Features/CRM Connect

Go to the *My Features* tab at the top then go to the *CRM Connect* tab on the left. 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.
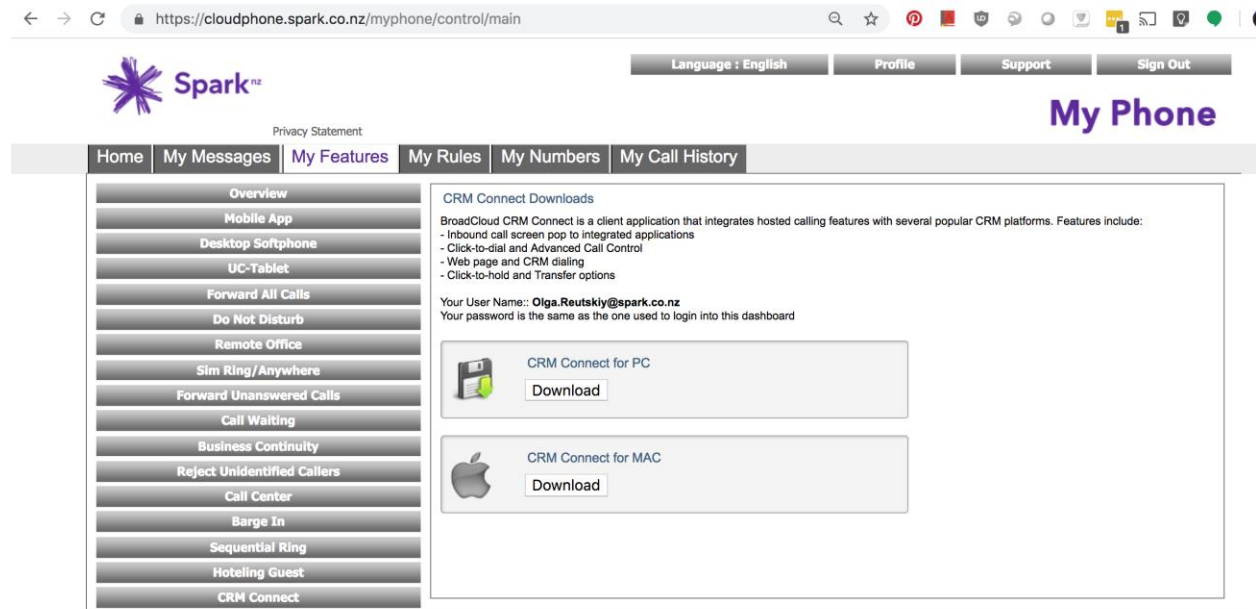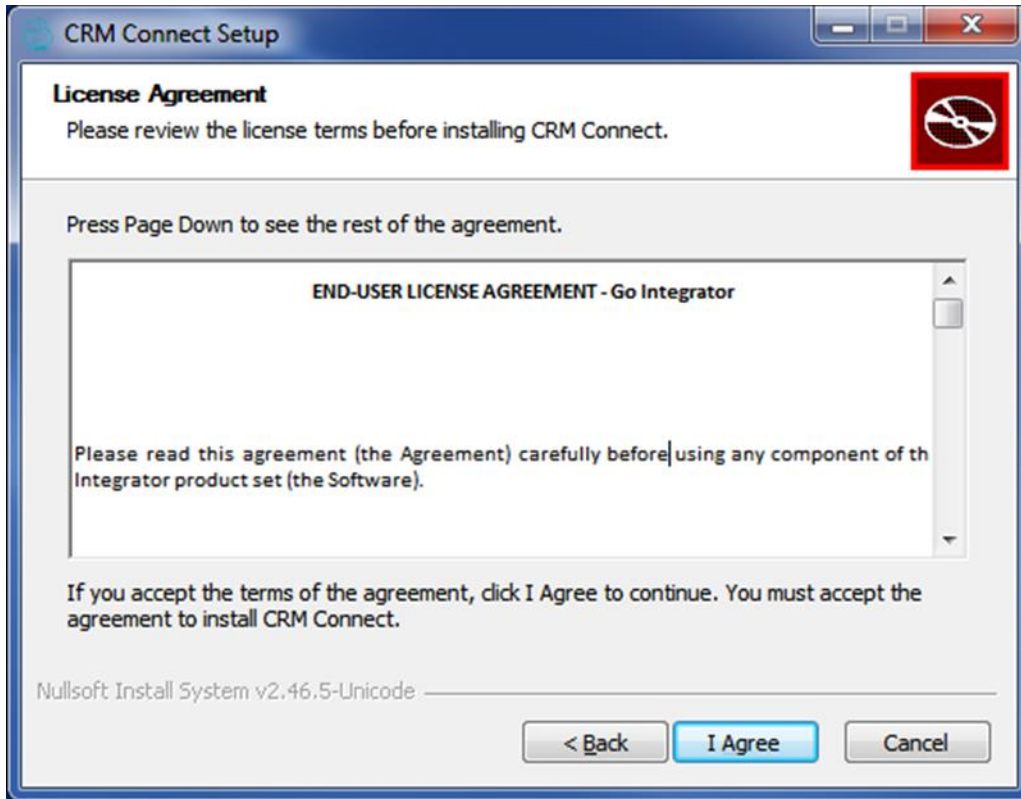
PC Client installation

Log in to an administrator-level user account on the Windows workstation that CRM Connect needs to be installed onto.
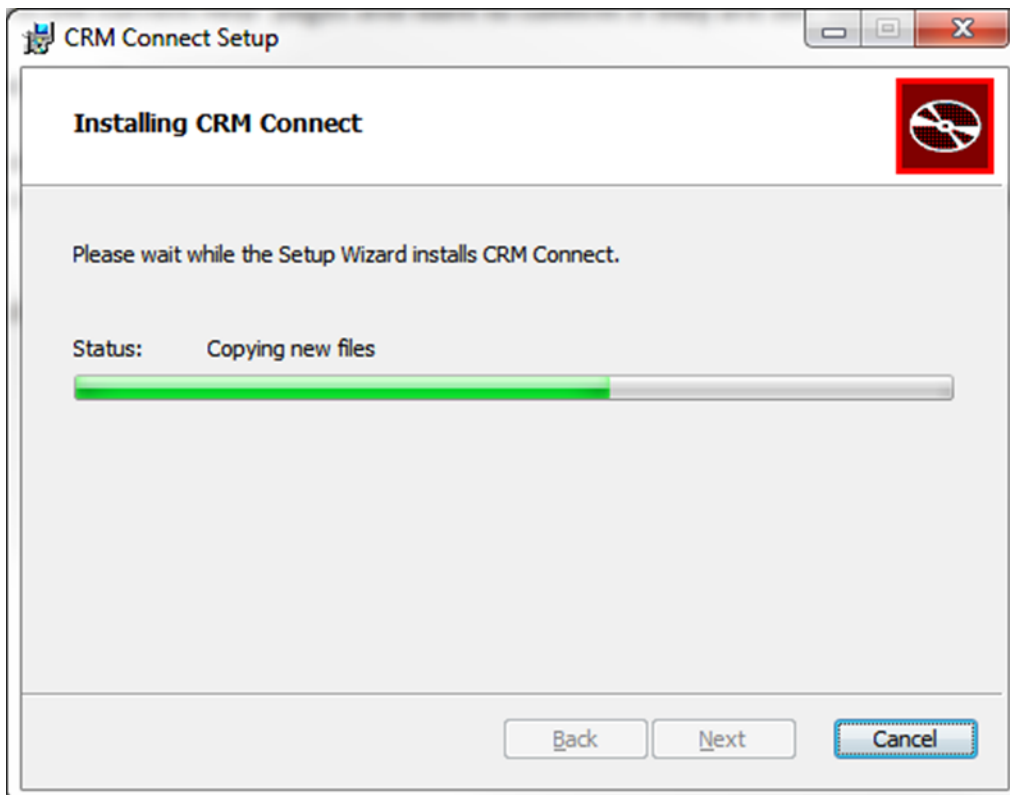
To begin installing CRM Connect, double-click the 'CRMConnect.exe' file and click the 'Install' button.


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.

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

< Back   I Agree   Cancel

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

CRM Connect Setup

Installing CRM Connect

Please wait while the Setup Wizard installs CRM Connect.

Status: Copying new files

Back   Next   Cancel

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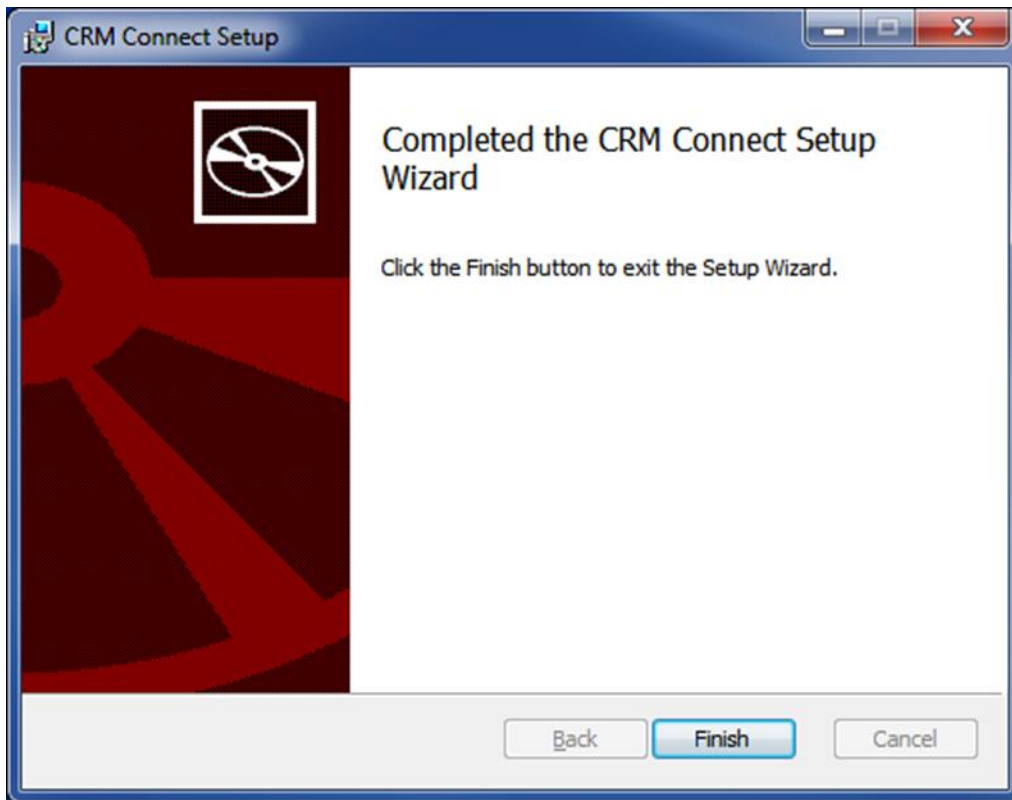

Login Details and Initial Configuration

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.

### Open the Credentials Window

CRM Connect is designed to be discreet. Always running and providing useful information as you need it, yet at the same time not annoying or 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.
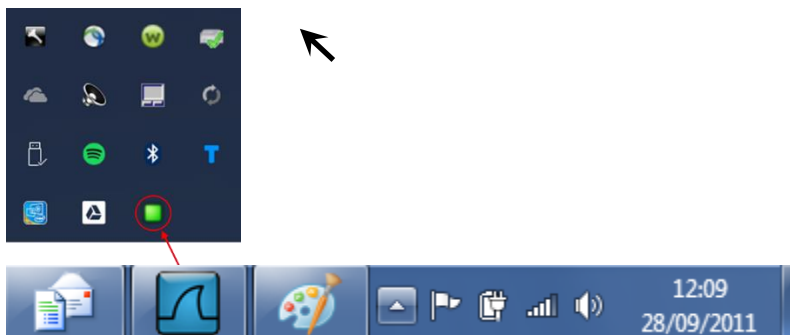
Note: In Windows, some tray icons become hidden and expressly have to be shown. These settings are stored in the Notification Area Icons part of the Windows Control Panel.

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:
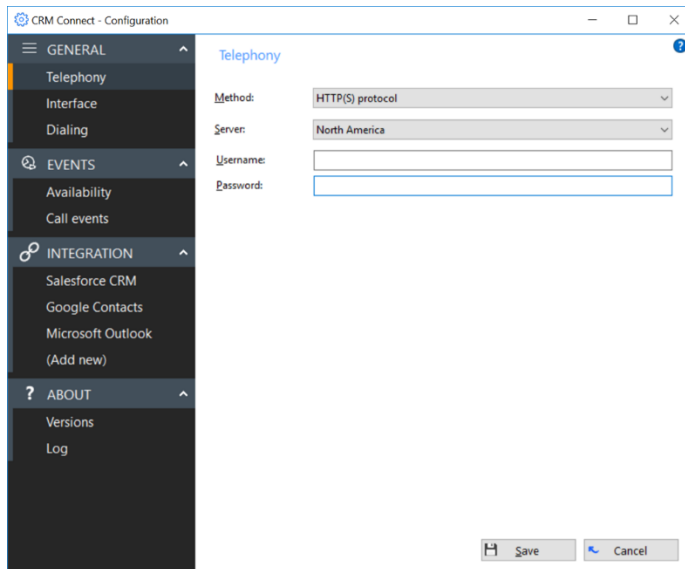
Telephony Configuration

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.
    - o If you want to use a physical desk phone for making calls then select HTTP(s)
    - o If you want to use a Cloud Phone application for making calls then select UC One
- 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.

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. Select the help icon in the upper right corner to be taken to a web page showing instructions for configuring the CRM Connect client with the specific CRM system.

Other Options
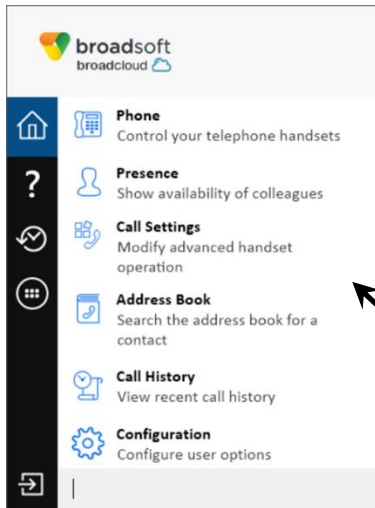
Home Tab

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 *(Enter text or a number here to search)*		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.

Recent		Quickly see recently dialed numbers and click to redial them

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

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

Troubleshooting

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.

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.

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.
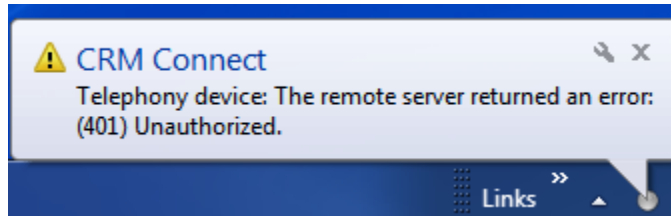
- Check to make sure the user has the CRM Connect license applied in the My Site/User Features/CRM Connect tab.
- Also make sure the user has the correct username and password entered correctly in the CRM Connect client.

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.

Integration with CRM Software and other Features

Please see the appropriate CRM Connect Integration Guides online for information on how to integrate with the chosen CRM software. This user guide 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, check the log for information.

Taskbar / System Tray Icon and review 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, we recommend 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:
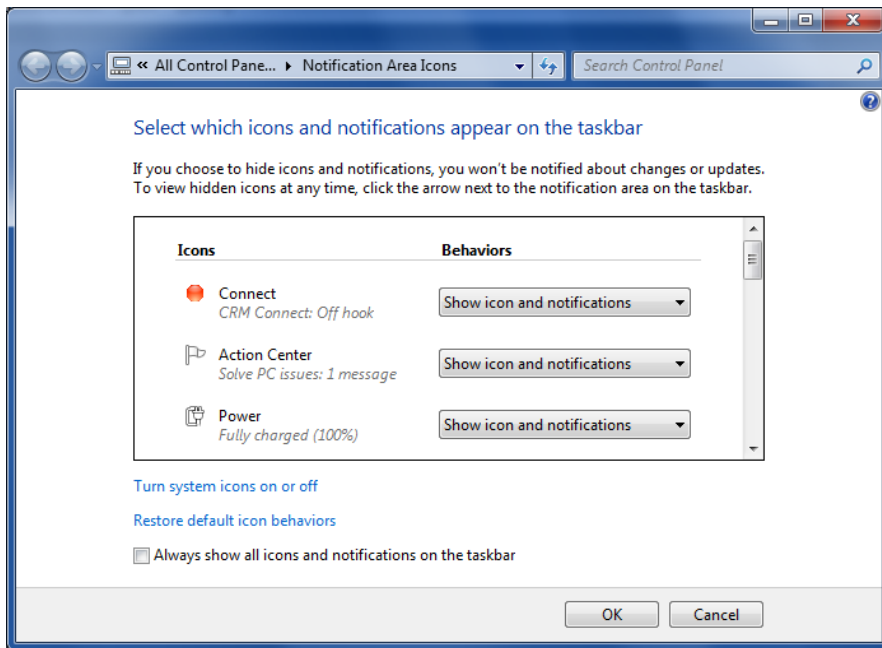
Another example is if you have a Cloud Phone desktop application, which also provides a preview window. This can cause a double pop up notification as shown below:
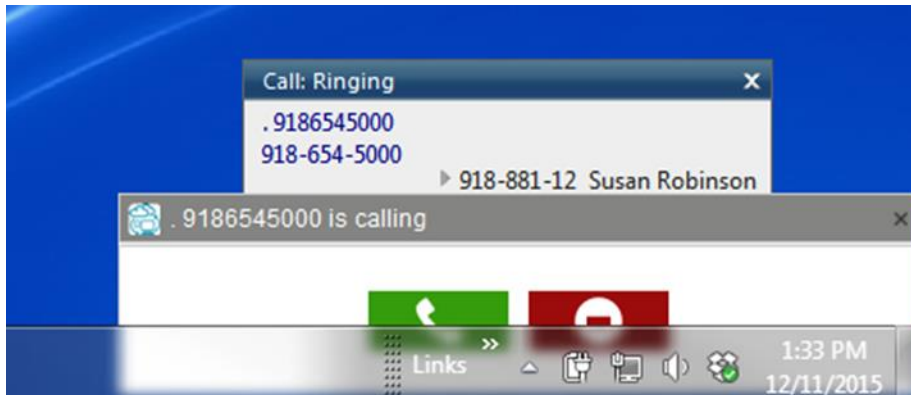
You can disable the notifications in either application to rectify this or move the CRM Connect notification to another location on the desktop.

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.

CRM Connect - Configuration

General
- Telephony
- Interface
- Dialing

Events
- Activities
- Availability
- Call events

Integration
- Salesforce CRM
- (Add new)

About
- Versions
- Log

Call events

Select the action to take place when calls happen

On ringing: No action

On answer: Show contact

On outbound: No action

Select the sounds to play when calls are received

On ringing:

Call waiting:

☐ Mute speaker when call in progress

Use following external programs when selected events occur

Event	Program	Parameters

Add   Edit   Remove   Import   Export

Save   Cancel