BT Cloud Voice: CRM Integrator & CRM Lite

Userguide

1 Overview

CRM Integrator (including CRM Lite) is an application for Windows Desktop that working in conjunction with your people's phones integrate CRM applications into the BT Cloud Voice service.

It works in conjunction with your Cloud Voice service and CRM software to enhance your experience and productivity.

There are two license types:

- o CRM Integrator Lite
- o CRM Integrator (DB)
- Both licenses offer the same basic functionality for call control, click to dial, call settings, address book search, presence etc.
- Both licenses provide integration into Microsoft Outlook, Lotus Notes and Google Contacts.
- The CRM Integrator ("DB") license offers integration into additional CRMs and other applications.

This guide will provide overview of the Installation and Set Up journey, along with some key features of the application.

2 Installation & Set Up

Once the CRM Integrator or CRM Lite add on has been ordered, the application download will appear in the Application section of the Business Portal as per the image below. It is the same application CRM Integrator for the full Integrator and Lite versions.
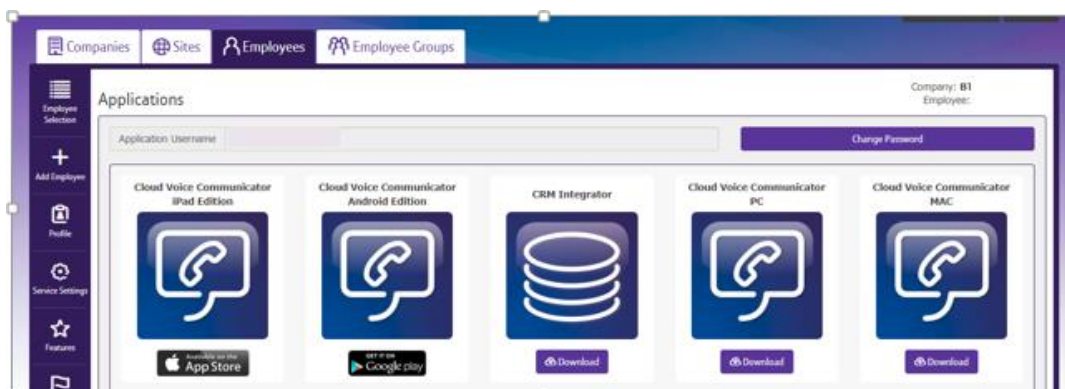
Download and Installation - Windows

You'll need **local admin rights** to carry out the installation, so you must use a Windows user account with administrator-level access.

In order to successfully install and use CRM Integrator, you'll need:

Minimum hardware requirements

Microsoft Windows Platform

The minimum hardware requirements for the Microsoft Windows platform include:
- 1.8 GHz Pentium-class processor
- 2 GB Memory
- 1 GB MB free hard drive space
- Operating System:
  - Windows 8 & 10 (desktop mode)
  - Windows 7
  - 32 and 64 bit
- Keyboard and mouse
- Network adapter connected to a TCP/IP network

How do I download the software?

1. Go to the applications section in the BT Cloud Voice portal
2. Download and save the installation package

How do I install the software?

1. Log in as an administrator on the PC on which you want to install CRM Integrator
2. Double-click the downloaded installation file
3. Click **'Install/Run'**
4. Follow the prompts
5. Click **'Finish'** when the prompt asks you to
6. If you disabled your antivirus or security software before starting the installation, enable it again now

How do I start? -

Help is available at every step by clicking on the **?** icon at the top right hand side of the screen

1. Once the installation has finished, you'll see the **'Telephony'** configuration screen
2. Enter your username and password (that's your BT Cloud Voice username and password; they'll be in your 'welcome' email)
3. Click **'Sign In'**
   - Select your area code from the 'Area code' dropdown box (this is so the application can recognise local phone numbers)
   - Select your **'Method of use'** (useful for when several people share a PC)
   - Click **'Save'**

How do I manage the username and password?

The username is in the format: <username>@<domain> e.g. user.one@acme.co.uk

To change the password

1. Login to the BT Cloud Voice portal
2. From the **'Employees'** menu, select **'Employee'**
3. Select **'Service Settings'**
4. Select **'Service Passwords'**
5. Set **'Password to Change'** to **'Application'**
6. Enter and confirm the new password and click **'Change Password'**

How do I set up CRM Integrator for an employee to use?

Assign the 'add-on feature' to an employee in the Business portal –

1. Login to the BT Cloud Voice portal
2. From the 'Employees' menu, select 'Employee'
3. Select 'Service Settings'
4. Scroll down to the 'Optional Add-On Feature Packages' section
5. Using the slider button turn on 'CRM Integrator'
6. Scroll down and click 'Save' at the bottom of the page

## 3 Operating the Feature

Integration

CRM Integrator provides integration to a wide range of different CRM and Contact orientated business applications. Integration provides a range of set integration features from the list below. Up to four Add-ins can be concurrently configured:

- **Caller Preview** - Displays the caller's name in the Call Preview window when a match is found between the caller's number and the contact information stored in the integrated application(s).
- **Contact Popping** - Instantly open the caller's contact record in the integrated application by clicking the application's icon in the Caller Preview window.
- **Contact Searching** - Enables you to concurrently search all configured integrations and pop the contact record or click to dial from the results.
- **Activity Logging** - Manually or Automatically create a history (Activity) log of a call received within the CRM and add notes.

Within the Configuration menu under Integration- Click the **(Add new)** item, select the type of CRM Integration from the dropdown list, and click **Set** (the first time you enter this screen you may have to wait a few seconds as the software scans to find out what integrations are available).
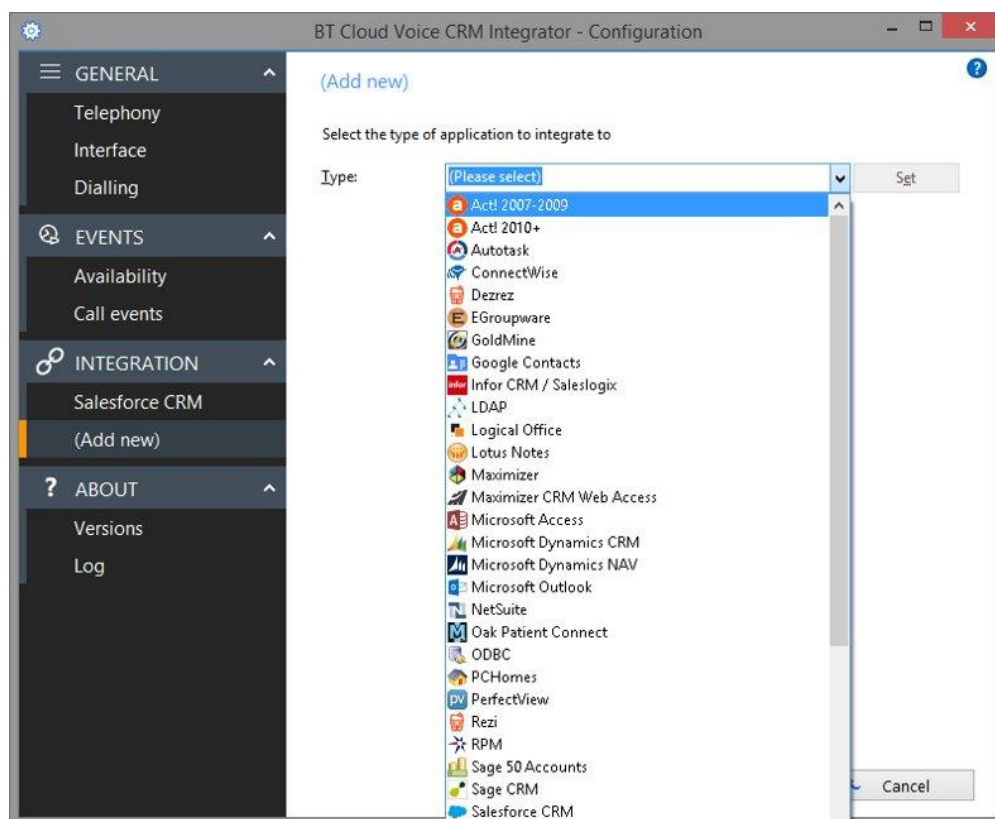
If you click on the ? it will bring up the integration guide specific to your CRM system :
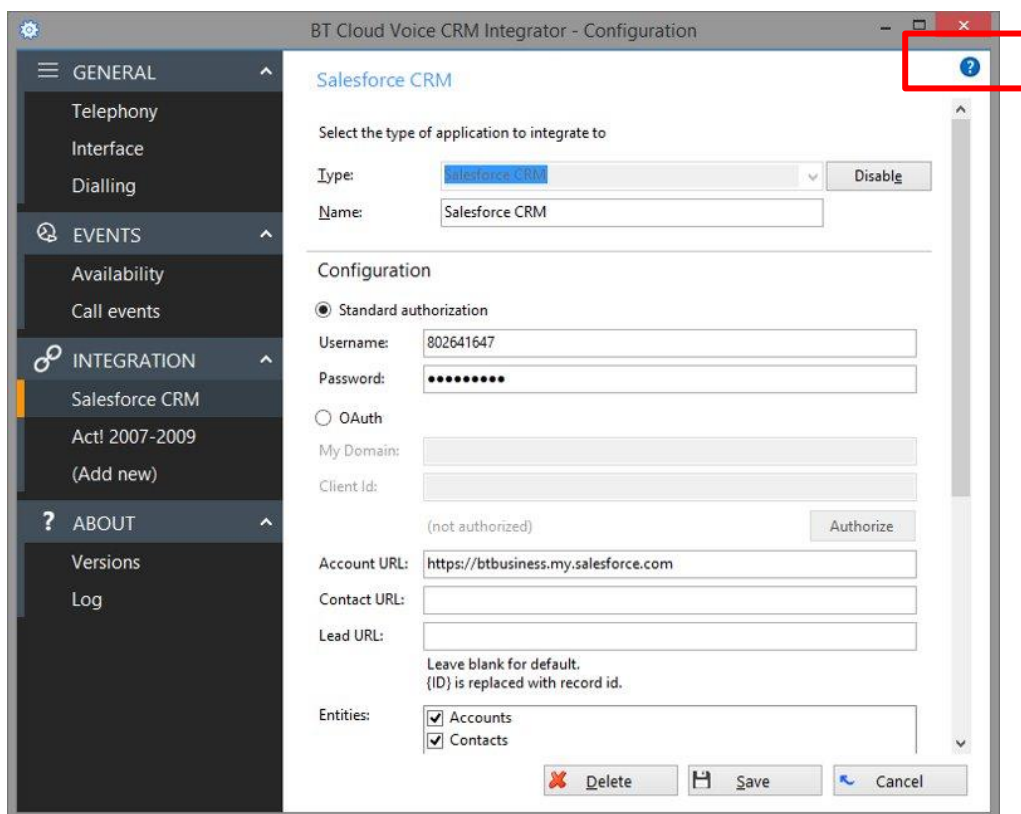
To modify an existing integration that you have set up, click its name in the list. You can also click its name and then click **Delete** if you no longer want integration to that CRM software.

For applications like Outlook, the software attempts to find and use default settings that will "just work" for you so you won't need to do anything more. For more complicated integrations, the software will do as much as it can for you, but you may need to help it by for example entering your password, or telling it where the CRM software files are, etc.

The Integration test area allows you to test the settings you have entered by entering a telephone number and seeing if the software can find it. If the number is found, you can click the **Show contact** button to make sure that "popping" works. When you are done, click **Save**. The new integration will be available immediately.

Skype for Business

If the Skype for Business client is running on your PC, you can make calls on your handset directly from the Skype client, without needing to use CRM Integrator.

If the "Update Skype for Business state when on a call" option is enabled in your CRM Integrator client configuration, your Skype status will be updated to reflect your CRM Integrator call status – such as "in a call" when the handset is busy, or "dnd" when you have do not disturb switched on.
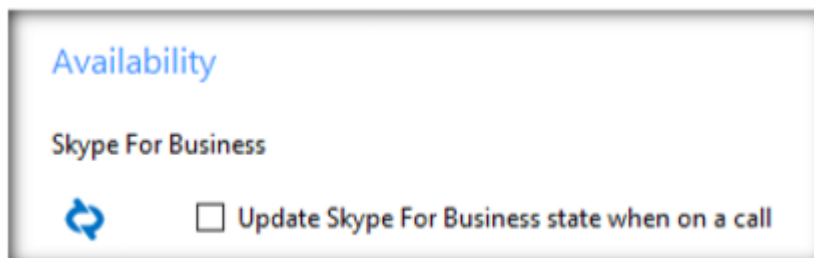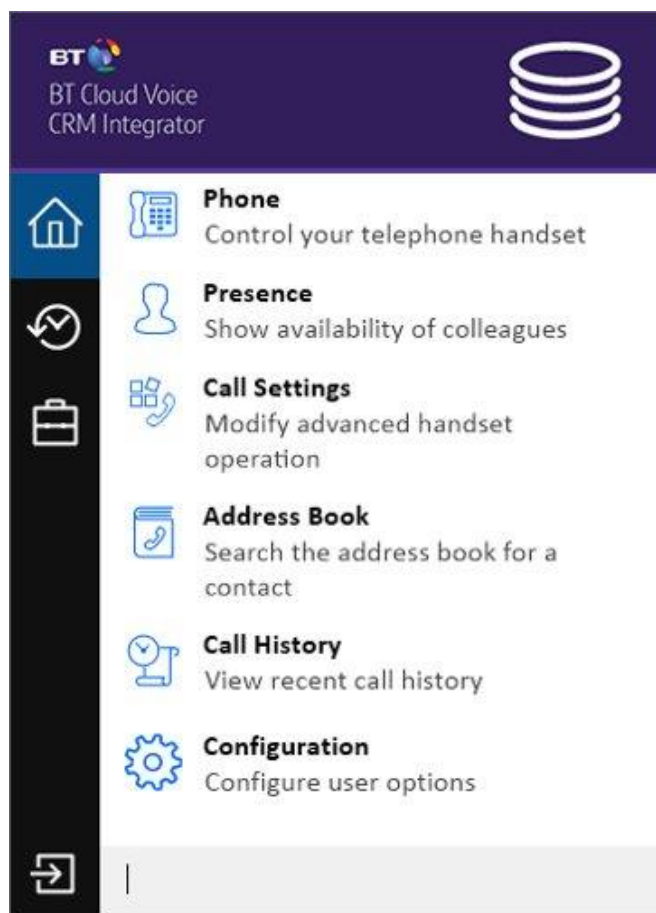

4   Call Settings

You can manage your call settings through the System Tray menu. You can configure and modify your settings for Call Forwarding, Anywhere, Remote Office, DND / Hide Number, In Office, CommPilot Express and Outgoing As.

The various tabs on the Call Settings page in the configuration are only displayed for the services that are assigned to you.
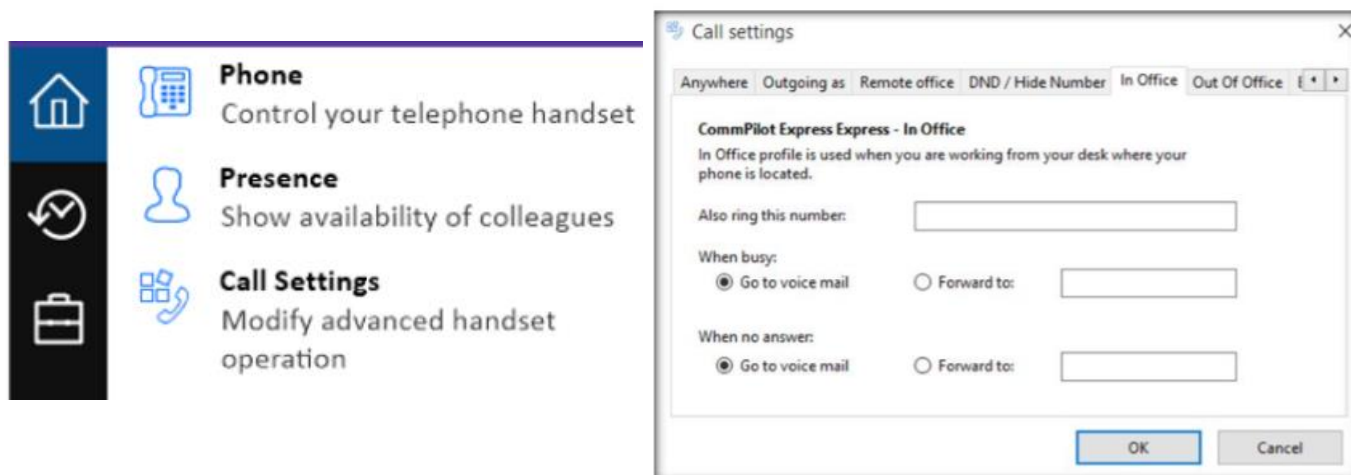
Tray menu

The tray menu is accessed by right-clicking on the BT Cloud Voice icon which is a green square (or red if you're on a call or yellow if a call is on hold).

Note: In Windows 7 and above, 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.

At the bottom of the tray menu is a text box where you can enter text or numbers to search for in all of the integrated applications.

Results are displayed directly in the tray menu as text is typed into the text box. Calls can be made to any contacts that are found by clicking on the number displayed in the results.

Clicking on the icons down the left-hand side of the tray menu displays the various sections of the tray menu.

Preview Window

The Preview Window is displayed whenever an inbound or outbound call is ringing.
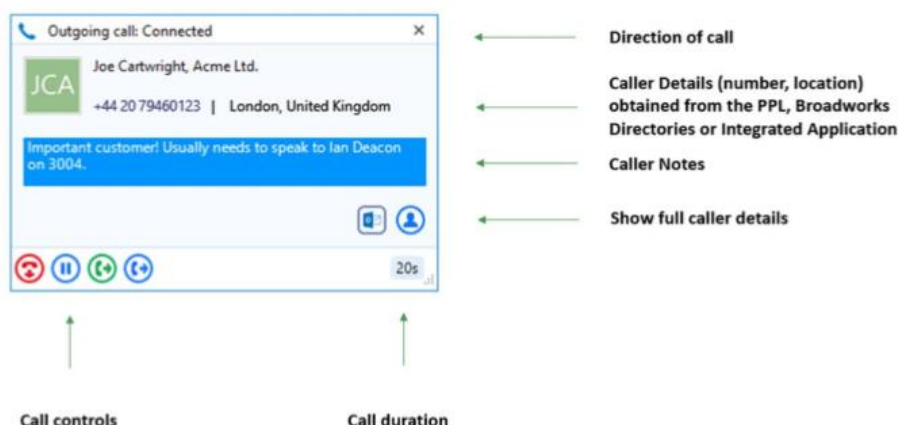

The Preview Window automatically disappears shortly after the call has connected but can be redisplayed at any time during the call by hovering over the system tray icon. It has been specifically designed to be as unobtrusive as possible, but without taking up a large proportion of your screen or obscuring the screens of other running applications. It displays the caller (or called party) details, which are obtained from the Personal Phone List (PPL), Broadworks Directories or Integrated Application/s.

Call Controls

|		
	Answer	When a call is ringing, you can choose to answer the call by clicking the "Answer" button or deflecting it (transfer it without answering it) to another extension.
	Deflect	
	Hang Up	End the call.
	Hold	Pause the call. The caller will hear hold music if available.
	Consult	Place the current call on hold pending a transfer, and makes a concurrent call to the selected extension.
	Transfer	Transfers the call immediately to the selected extension (remember to say goodbye first!)
	Show Contact	Shows the caller's full contact details, as obtained from the Personal Phone List (PPL)
	Add Contact	Add the caller to the PPL and fill-in their details during the call.
	Pop Contact	Shows the caller's full contact details from the CRM or other integrated application. The icon will be that of the application (example shown here for Outlook).

Preview Window (Stacking)

If there's more than one active call, the Preview Windows for those calls are automatically stacked to reduce the overall size of the display. Clicking on the header of any window will bring it to the front.
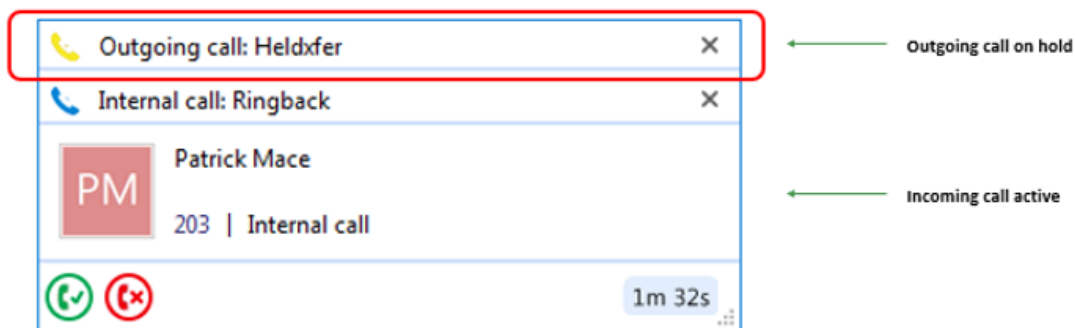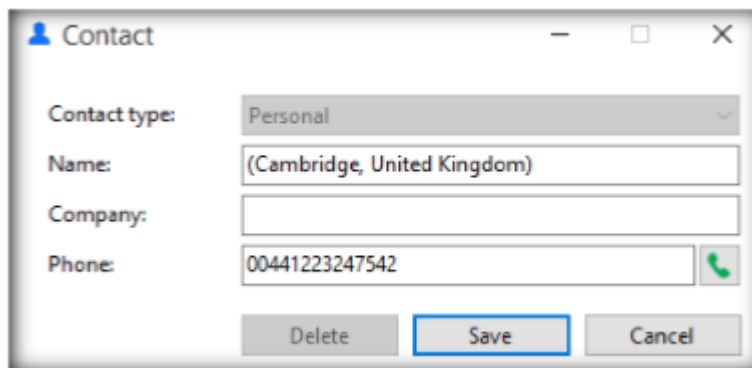

Phone Window

The larger Phone Window can be accessed either from the "Phone" option on the System Tray menu, by clicking on the "Preview" window while it is being displayed, or by double-clicking the system tray icon at any time.
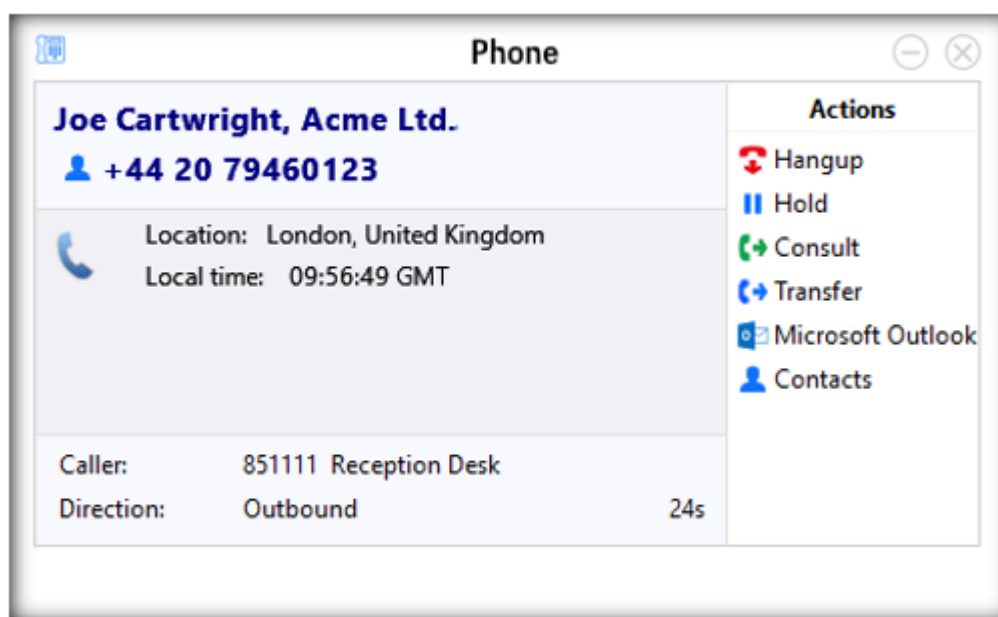
This window contains many of the same caller details and call control options as the Preview Window and is usually used by beginner users as they first start to become familiar with the CRM Integrator client and its features. More experienced users tend to use the smaller Preview window.

Personal Phone List (PPL)
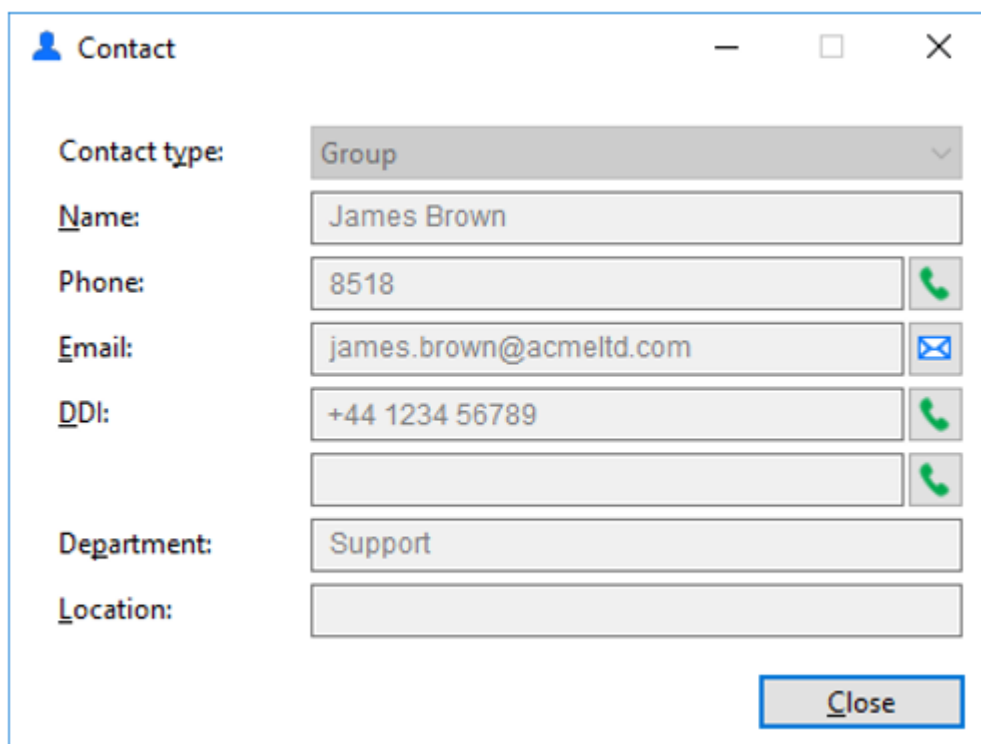
You can create, edit and delete details of your regularly used contacts in the PPL.

Broadworks Directories

CRM Integrator also searches the Enterprise, Enterprise Common, Group and Group Common directories (according to user privileges).


Whenever a call is made or received, a name lookup will be made against these directories, and if a match is found, the contact's detailed can be popped.

Address Book Searching

The address book search feature in CRM Integrator can be used to search the PPL and Broadworks directories.

If configured to do so, the "Lite" and "DB" versions of CRM Integrator can also search Outlook, Lotus Notes and Google Contacts, and the "DB" version can also search for contacts in any integrated CRM or application.

In this example, we're searching for contacts with a name of "jose", and the search has included Google Contacts.
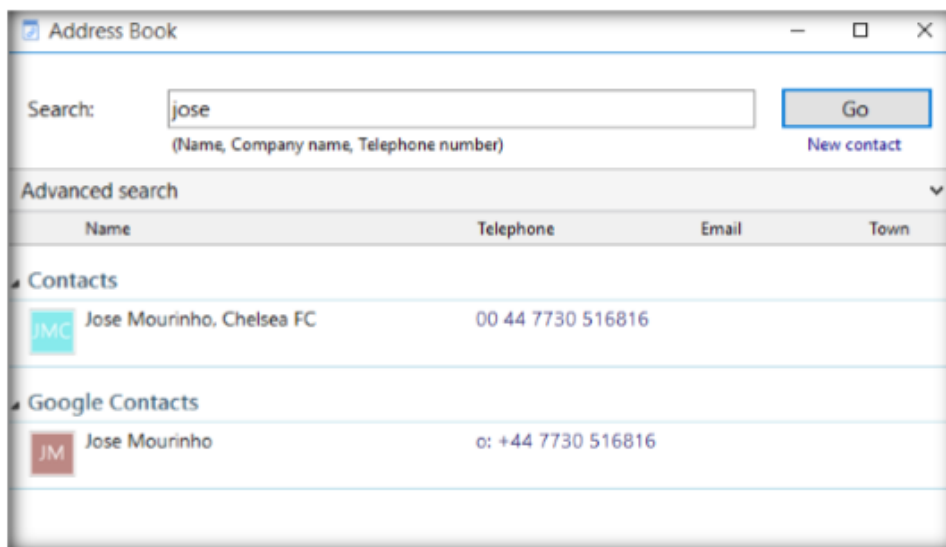

Call Control within the Address Book Search

The "consult" and "transfer" call controls can be used against any contact in the address book. With a call already connected, click on the contact's number in the search results to put the original call on hold and make the consult call.
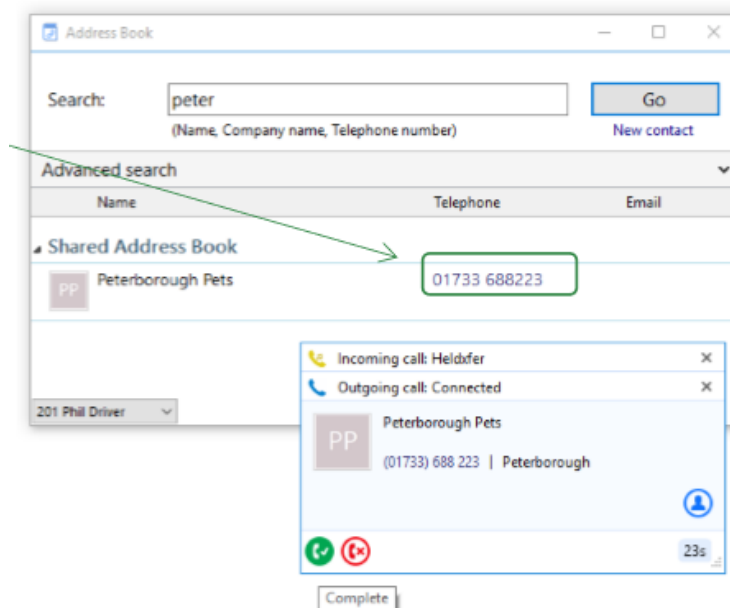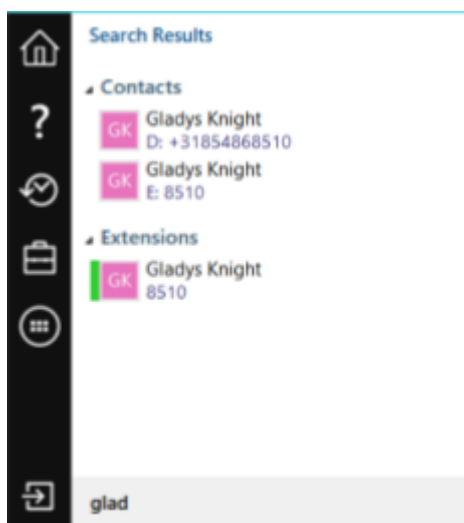
Presence

The Presence window allows you to check the status of your colleagues' extensions, including when they have DND or Forwarding set. The content of the display can be controlled to define and limit which user extensions are displayed. It is generally not advisable to monitor more than 50 extensions from within the Presence display (this can be controlled using the "Customised" view in the Presence window).
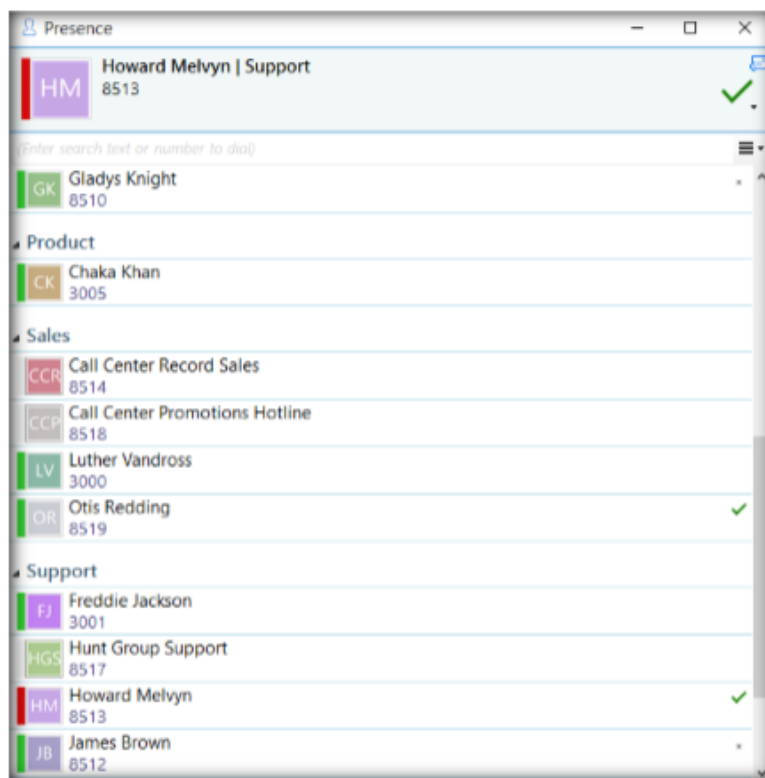

Coloured strips indicate DND and Forwarding (when set).

Extension status can also be checked from the system tray menu. Searching from here is a great way to check the status of colleagues not saved in your Presence window if the Customised view is used.

Call Control (within Presence)

You can make calls to, or consult with, or transfer calls to, any of the listed extensions, directly from the Presence screen.
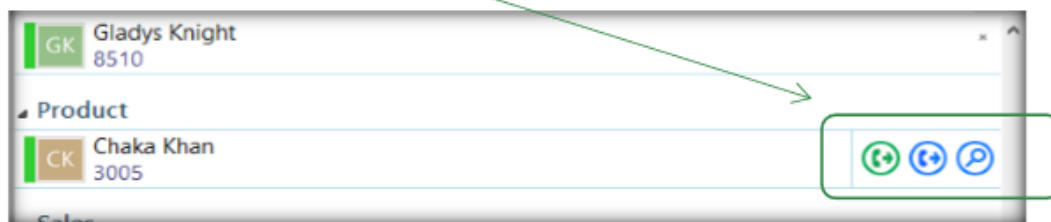
Presence (Docking)

On Windows 8 and 10 systems, the Presence window can be "docked" to the right or left-hand side of your primary monitor.

The docking is controlled by setting the width of the Presence window while it is normalised, and then clicking the maximise button. The docking will take place automatically.

With the Presence window docked, all other running applications that are maximised will fill the remaining part of your primary monitor, up to the edge of the docked Presence window.

Dialling Options

CRM Integrator offers a wide range of click-to-dial features to speed up the outbound calling process, both in locating the number to dial, and in the actual dialling process itself. The following features are described below: Quick Dial, Recent Calls, Call History and Webpage Dialling.

Quick Dial

In the "quick dial" entry box at the bottom of the System Tray menu, you can type the phone number and hit Return to dial the number. You can also type a contact's name (either full or partial) to initiate a search in the PPL, Broadworks directories and any integrated applications. If any matches are found, the search results are displayed directly within the System Tray pop-up, and you can click a displayed number to dial it.

Recent Calls

The "recent calls" option displays a list of your most recent incoming and outgoing calls. Click any of the items in the list to quickly re-dial. This is particularly useful for reducing the time spent locating and dialling numbers, especially when contacts are regularly dialled and then re-dialled in a short space of time.

Call History

The "call history" option displays a list of your most recent inbound and outbound calls, and it also displays your missed calls - ensuring that you never miss that important incoming call. A customisation option allows these call logs to be pulled from the Broadworks platform.


Web Page Dialling

CRM Integrator can also recognise telephone numbers in web pages and will convert them to hyperlinks so that you can click-to-dial directly from the web page.
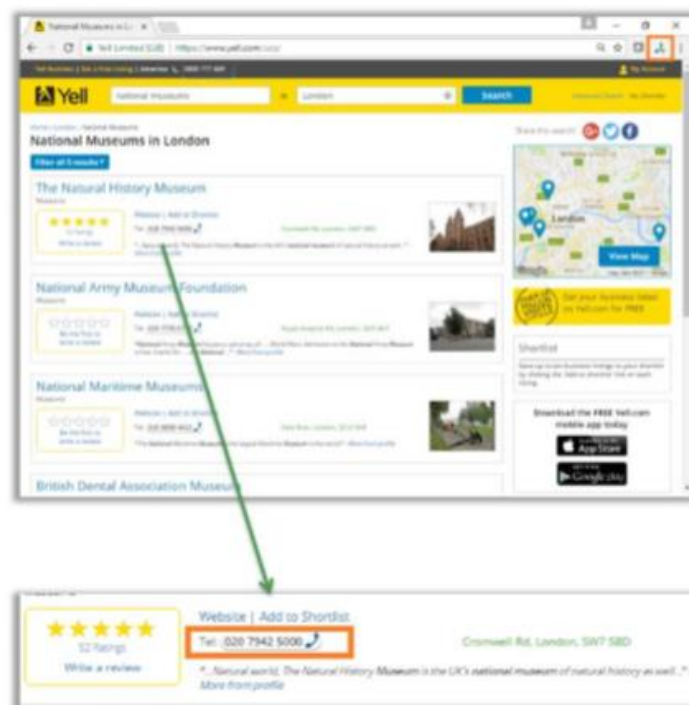
Focus Dialling

Focus dialling offers a similar click-to-dial capability within applications. Once enabled, it will automatically detect fields that contain dial-able numbers and presents a click-to-dial icon to the right of the field.

If the field contains more than one potential telephone number, a drop-down is displayed when you hover over the icon, allowing you to select which number to dial.
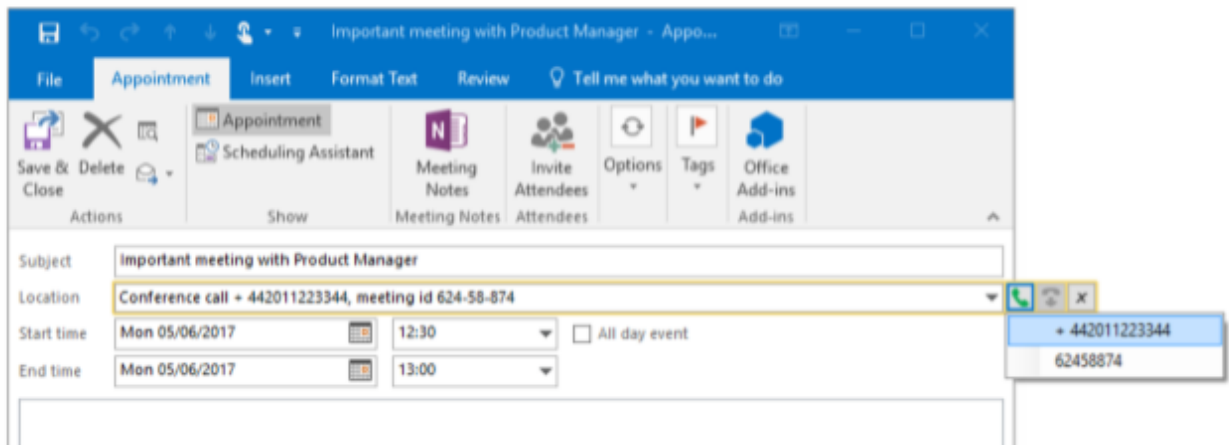
Additional help can be found in all areas on the CRM Integrator application itself just by clicking on the ? icon.