



Hosted PBX CRM Connect

PC User Guide

V1.1

XO Hosted PBX CRM User Guide

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1 Introduction

1.1 Overview

CRM Connect is a Hosted PBX Application for a Desktop that integrates leading CRM Applications into Hosted PBX's 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.

1.2 Audience

This document is intended for Administrators and End Users who will install and use 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)
- 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.

2.1.4 CRM Applications & Version Information:

<u>Manufacturer</u>	<u>Application Name & Version</u>
Allstate Insurance Company	eAgent
ConnectWise	ConnectWise PSA - 2015.1
	ConnectWise PSA - 2014.4
	ConnectWise PSA - 2011.2 - 2013.1
Frontrange	Goldmine - 5.5 - 9.2
	Goldmine - 2014 (Premium)
	Goldmine - 2013
Google	Contacts
IBM	IBM Notes - 9.0
	Lotus Notes - 7 - 8.5
Maximizer Software Inc.	Maximizer - Cloud Versions 2012, 2015, 2015 R2
	Maximizer - 9 - 12
Microsoft	Access - 2013 / Office 365
	Access - 2000 - 2010
	Dynamics CRM - 3, 4
	Dynamics CRM - 2015
	Dynamics CRM - 2011, 2013, Office 365
	Dynamics NAV - 4.0 - 5 (SQL Database)
	Dynamics NAV - 4.0 - 5 (CLASSIC Database)
	Dynamics NAV - 2016 (SQL Database)
	Dynamics NAV - 2015 (SQL Database)
	Dynamics NAV - 2013 R2 (SQL Database)
	Dynamics NAV - 2013 R2 (CLASSIC Database)
	Dynamics NAV - 2013 (SQL Database)
	Dynamics NAV - 2013 (CLASSIC Database)
	Dynamics NAV - 2009 R2 (SQL Database)
	Dynamics NAV - 2009 R2 (CLASSIC Database)
	Dynamics NAV - 2009 (SQL Database)
	Dynamics NAV - 2009 (CLASSIC Database)
	Outlook 32 bit - 2013, Office 365
	Outlook 32 bit - 2000 - 2010
	Outlook 64 bit - 2013, Office 365
Outlook 64 bit - 2000 - 2010	
NetSuite Inc.	Netsuite CRM - 2015
	Netsuite CRM - 2013
	Netsuite CRM - 2010 - 2012
SAGE	50 Accounts - 2015
	50 Complete Accounting - 2014

	50 Complete Accounting - 2012, 2013
	ACT! Professional - 2013
	ACT! Professional - 2008 - 2012
	Line 50 Accounts - 2014
	Line 50 Accounts - 2008 - 2013
	Sage 200 with Sage CRM module
	Sage CRM / MME - 7.3
	Sage CRM / MME - 7.2, 2013
	Sage CRM / MME - 7.0, 7.1
	Sage CRM / MME - 2014
	Sage Saleslogix - 7.2 - 7.5
Salesforce.com Inc.	SalesforceCRM - Enterprise, Unlimited, Performance Edition
Stylite	eGroupware - 1.0 - 1.8
Sugar CRM	Sugar CRM - 7.6
	Sugar CRM - 7.2
	Sugar CRM - 5.0 - 7.1
SuperOffice	SuperOffice - 6 - 7.1
Swiftpage	ACT! Premium - V18
	ACT! Premium - V17
	ACT! Professional - V16
	Saleslogix - 8
vtiger.com	vtiger CRM - 6
	vtiger CRM - 4 - 5
XING	XING
Zoho Corp.	Zoho CRM - Standard, Professional, Enterprise

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.

2.2 Licensing Requirements

CRM Connect licenses must be purchased at the Site level and assigned to end users in My Site/User Features/CRM Connect in order to use the application.

2.3 Network and Firewall Requirements

You may need to allow outbound access for the following on your firewall:

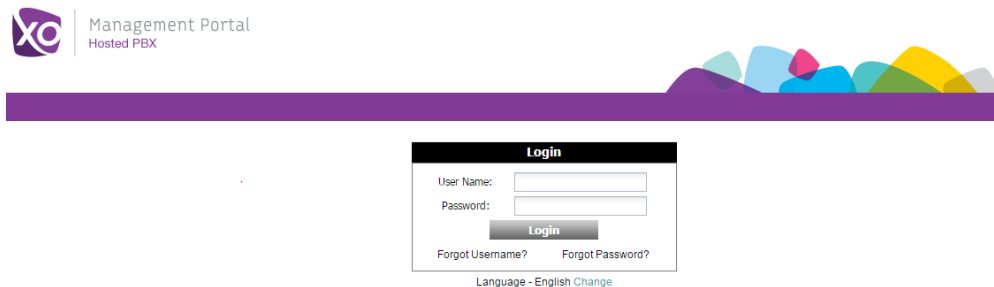
Protocol	Destination	Destination Port
HTTPS	apps.broadcloudpbx.net	TCP 443

3 Client Download

When a user has a CRM Connect licensed assigned by an admin via the My Site portal, the client installation file can be downloaded from a user's My Phone portal.

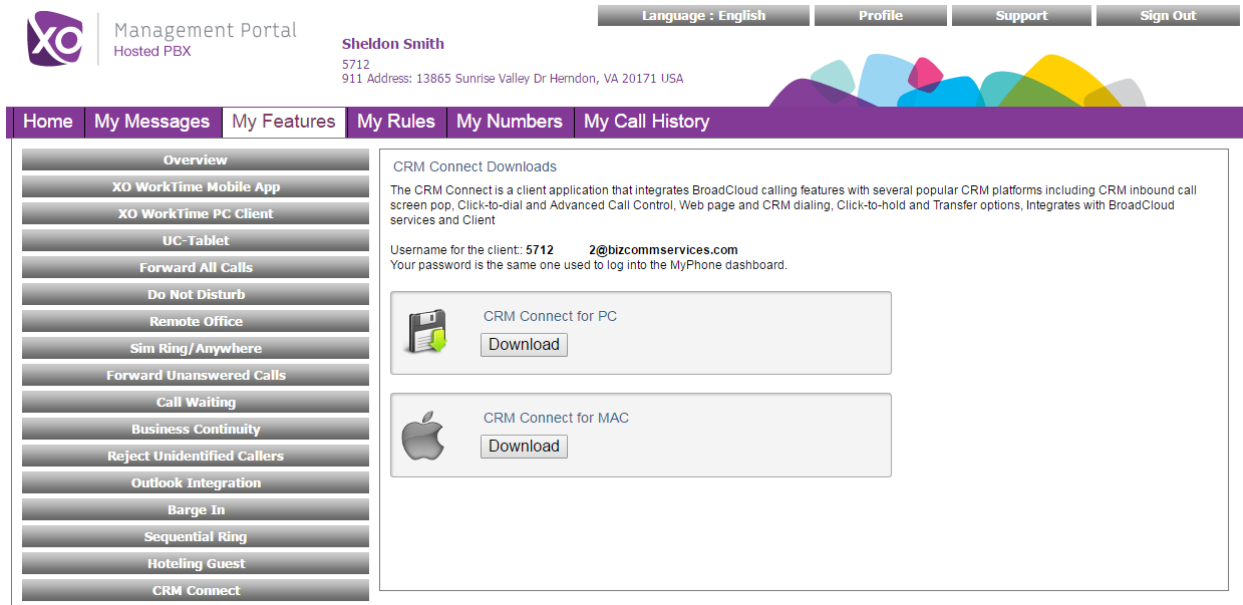
3.1 Log into My Phone

Go to the My Phone URL in your browser and enter your username and password.



3.2 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.



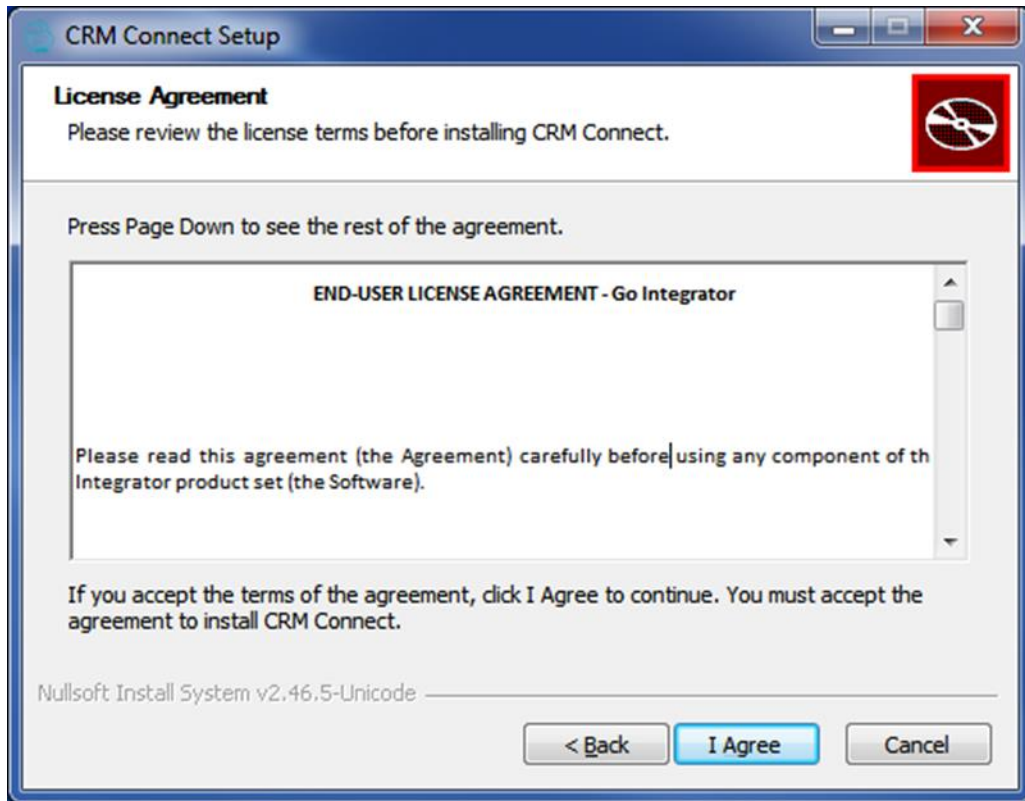
4 PC Client Installation

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

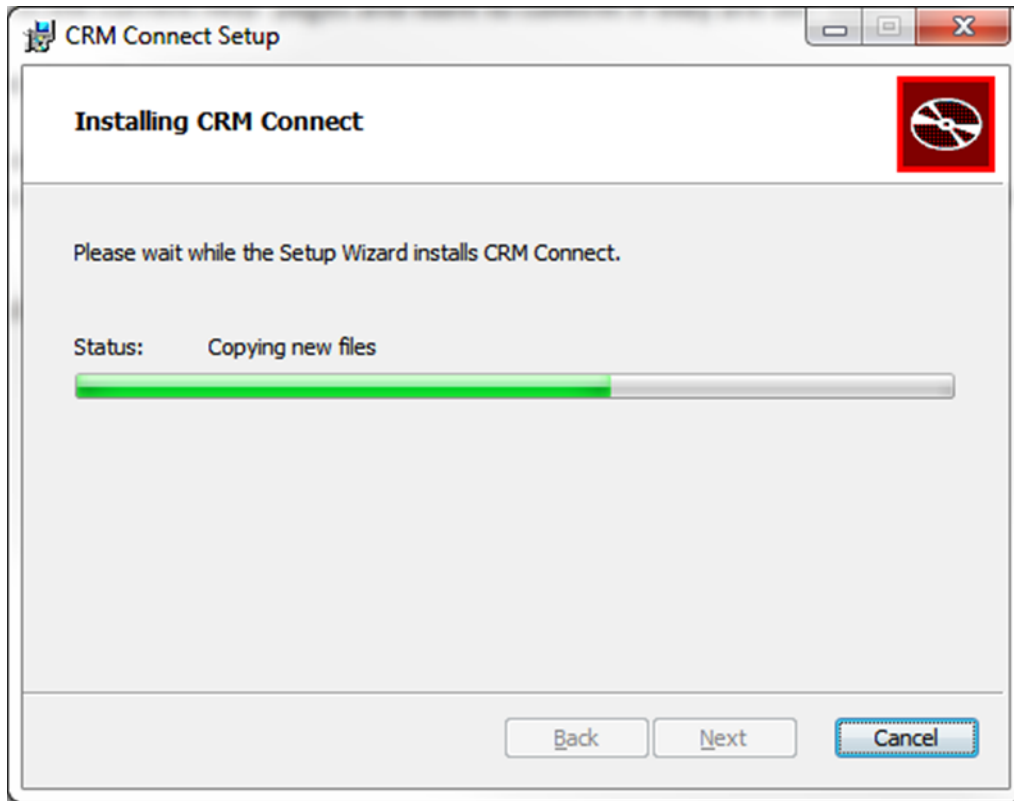
To begin installing CRM Connect, double-click the 'CRMConnect.exe' file and click the 'Install' button.



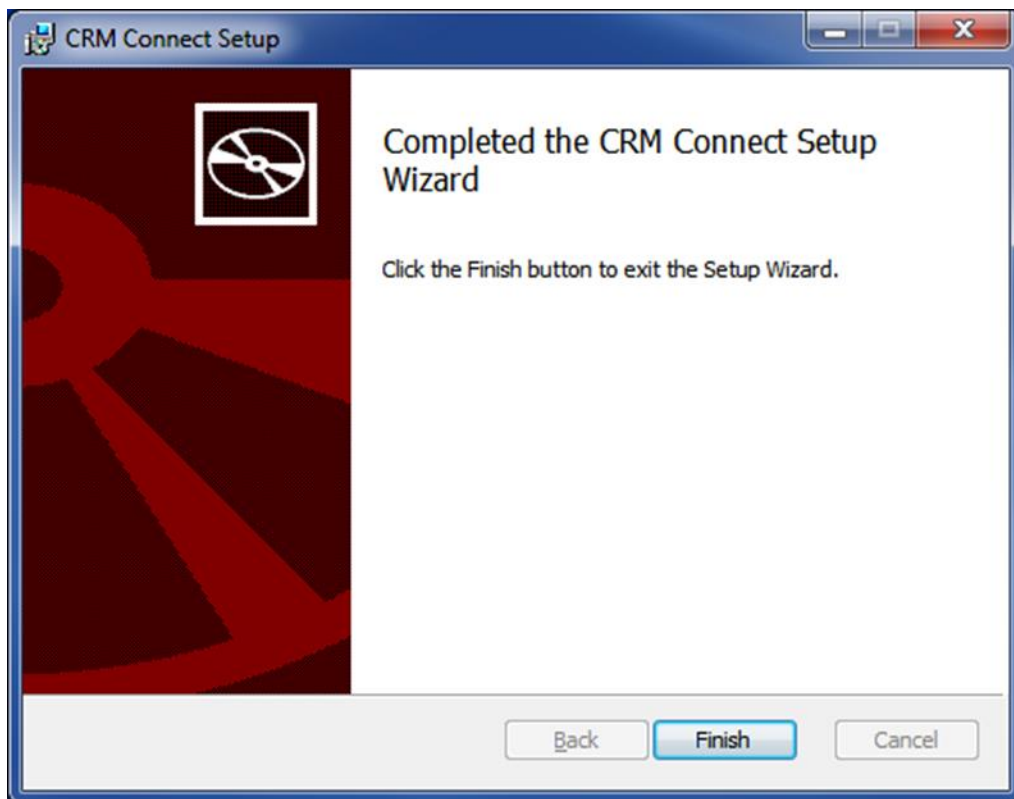
Review the End-User License Agreement and hit the / Agree button to continue. You must agree to the End-user License Agreement to complete the installation. You may hit the *Cancel* button to exit the installation process.



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.



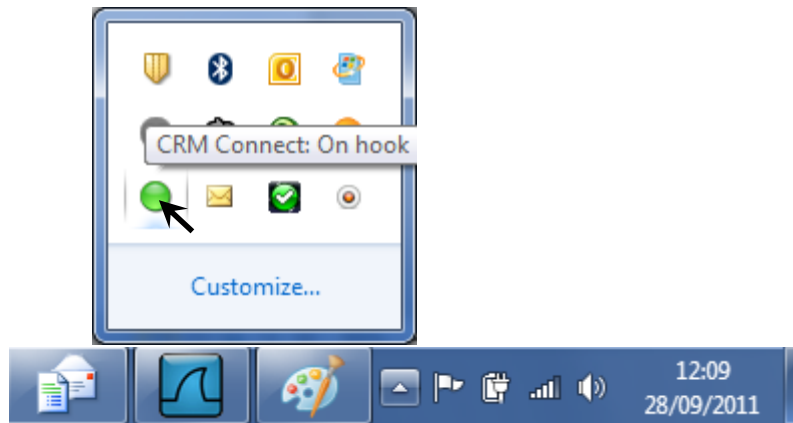
5 Login Details and Initial Configuration

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

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

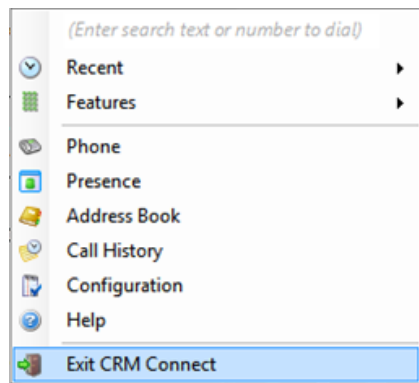
5.1 Open the Credentials Window

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.

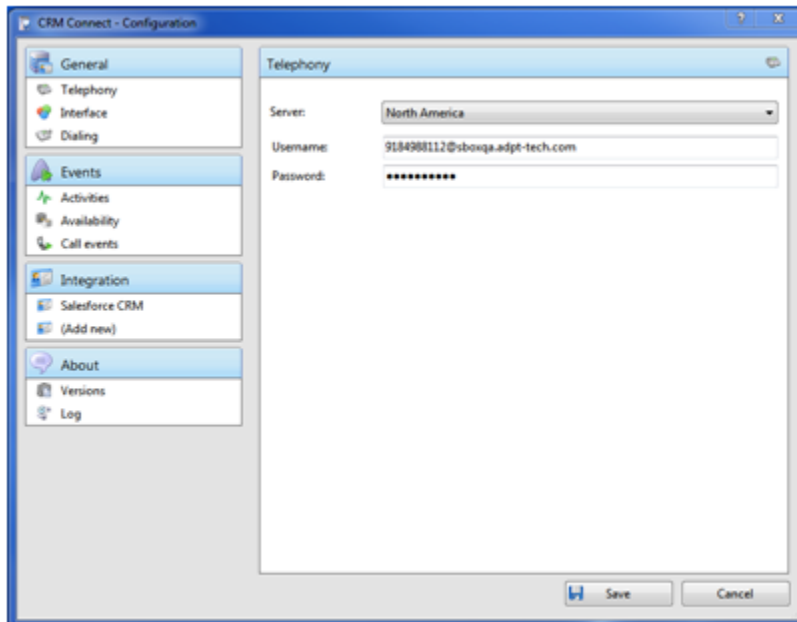


Note: In Windows, some tray icons become hidden and expressly have to be shown. These settings are stored in the 'Notification Area Icons' part of the Windows Control Panel.

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:



5.2 Telephony Configuration

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

- **Server:** Select the appropriate market where the user is located. This determines which server will be used to authenticate the user.
- **Username:** This is the username found in My Phone under the CRM Connect tab. See Section 3.2 above and the My Phone User Guide for more information

Your Username takes the format: <username>@<domain> For example, user.one@acme.com

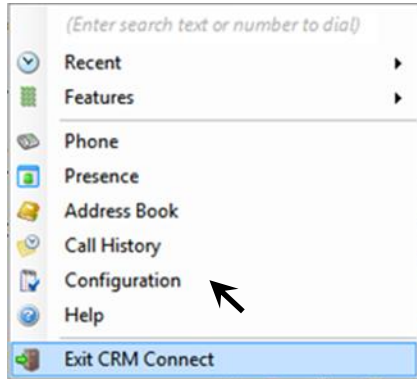
- **Password:** The Password can be set/changed via My Phone. Go to the My Phone log in page and hit the "Forgot Password?" link. Enter your username and hit "Reset Password". A temporary password will be emailed to you.

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. .

See the Integration Guide for your CRM application at <http://info.broadcloudpbx.com/php/cpbx/node/929> for specific details on the the integration.

5.4 Other Options



Quick dial box	Type a number here and press Enter to make an immediate phone call
Recent	Quickly see recently dialed numbers and click to redial them
Features	Allows the configuration of specific Hosted PBX features for the user including Call Forwarding Always and Do Not Disturb
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.
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 Hosted PBX call history from the basic call log.
Help	Opens a web browser to the on-line help pages.
Exit	Use this to unload the software as an active application.

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.

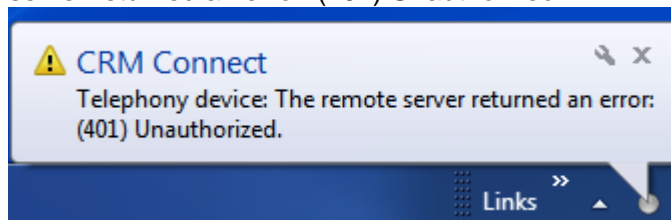
6.2 Running CRM Connect

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 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.

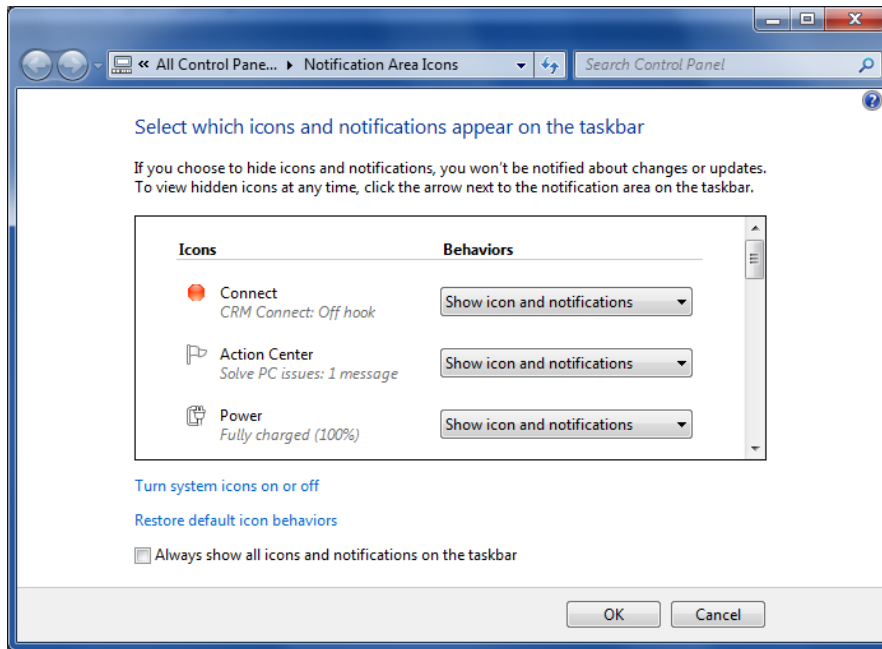
6.4 Integration with CRM Software and Other Features

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.

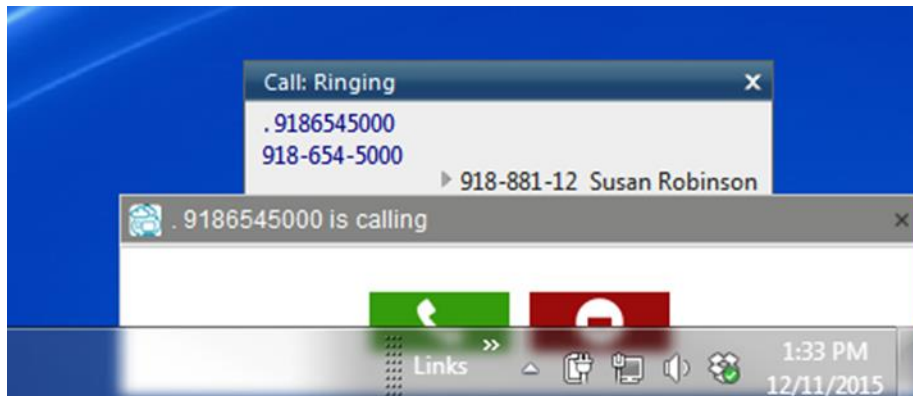
6.5 Taskbar / System Tray Icon and Preview Window Notification Management

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 Hosted PBX WorkTime Desktop client, 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.

