



**CONVERTec Inc.**



# CRM *Integrator*

## **Installation & User Guide**

**Version 1.0.0**

**By ConverTec Inc.**

**[www.convertecinc.com](http://www.convertecinc.com)**



CRM Integrator is a Nortel Compatible Product. CRM Integrator underwent testing in Nortel Networks laboratory ensuring integration to the Business Communications Manager (BCM) and Norstar phone systems is seamless.

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# Table of Contents

Welcome.....	2
Installation.....	3
Installation.....	3
Client Connection Wizard.....	6
Configuring TAPI.....	11
Installing TAPI.....	11
Configure Outlook for ConverTec TAPI.....	12
Operating The Toolbar.....	14
Loading the Toolbar.....	14
Toolbar Description.....	15
Call Buttons 1 & 2.....	15
Release.....	15
CRM Search.....	15
Call History / Missed Calls.....	15
This button has two states.....	16
Call History is displayed if no new calls have gone unanswered since you last viewed the Call History.....	16
Missed Calls is displayed if calls have rung at your telephone and not been answered before the caller hangs up or gets forwarded to another phone or Voice Mail. The number of missed calls is displayed for local extension calls as well as external incoming calls. After clicking on the Missed Calls button, the Call History window opens displaying the answered and unanswered calls and the Missed Calls counter is reset to zero.....	16
DND.....	16
Status Selection.....	16
Setup.....	17
Information.....	19
Help.....	19
Call History Window.....	20
Contact Searching.....	20

Welcome



## For MS Outlook 2003/2007

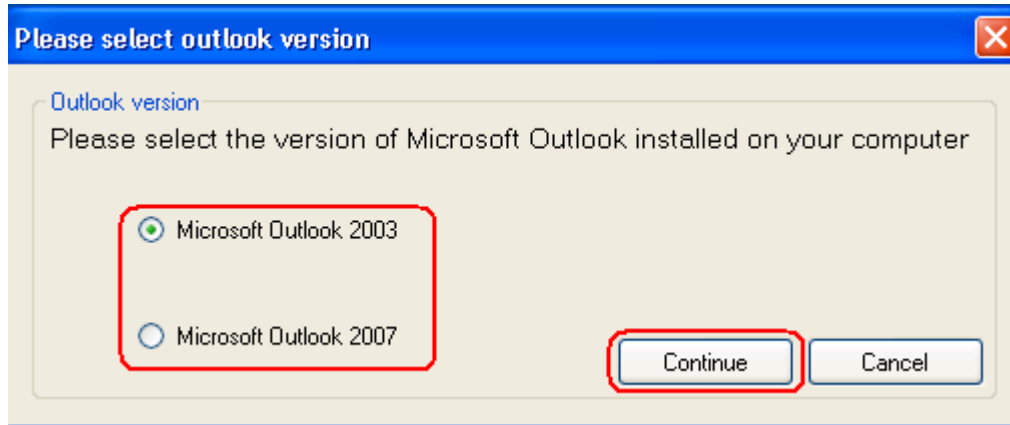
CRM Integrator for Microsoft Outlook 2003/ 2007 adds a new Toolbar Plug-in that allows users to seamlessly integrate their Nortel phone and add the following functionality;

- Automatic / Manual Contact folder searching by Calling Number
- Outbound Contact Dialing through ConverTec TAPI driver integration to your telephone extension
- Call History and Missed Call window allows review and Dialing of all incoming calls whether answered or not
- Status messaging displays your status to other ConverTec applications such as CALL Navigator™.
- Answer / Release and view CLID information for your Nortel Telephone calls from within Outlook
- Enable / Disable Do Not Disturb on your Nortel phone
- View Call Forward status

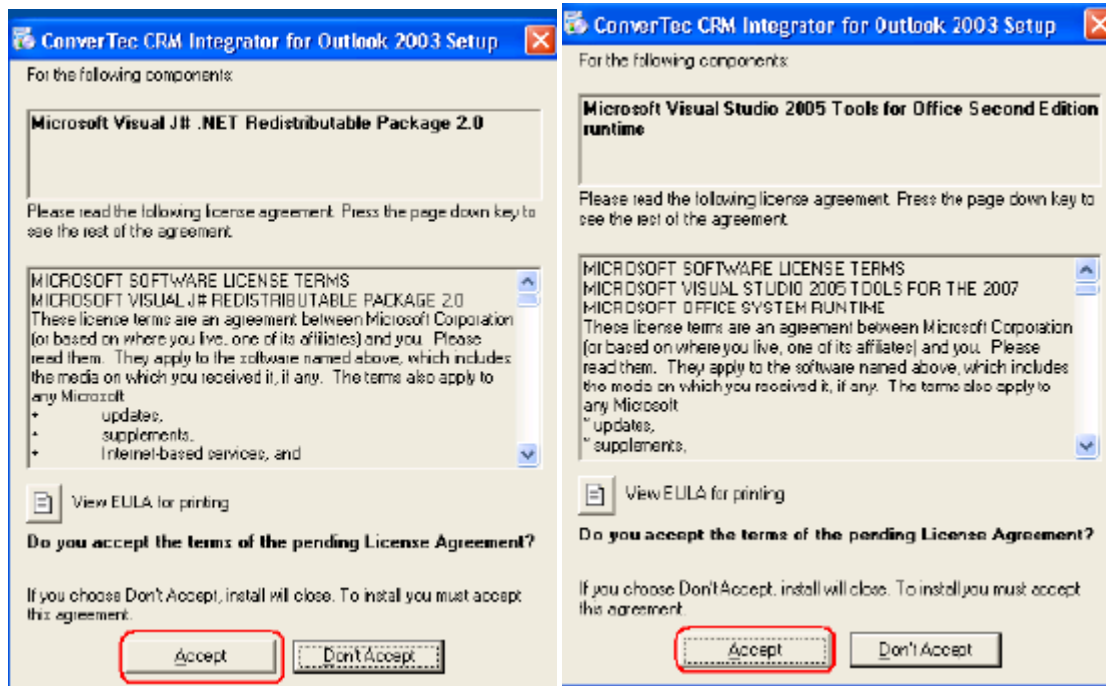
## Installation

CRM Integrator for Outlook is available via independent download from ConverTecinc.com or as part of the CEO Suite package. This Plug-in is designed to function in conjunction with "ConverTec Communication Server". Follow the instructions below to install CRM Integrator for Outlook.

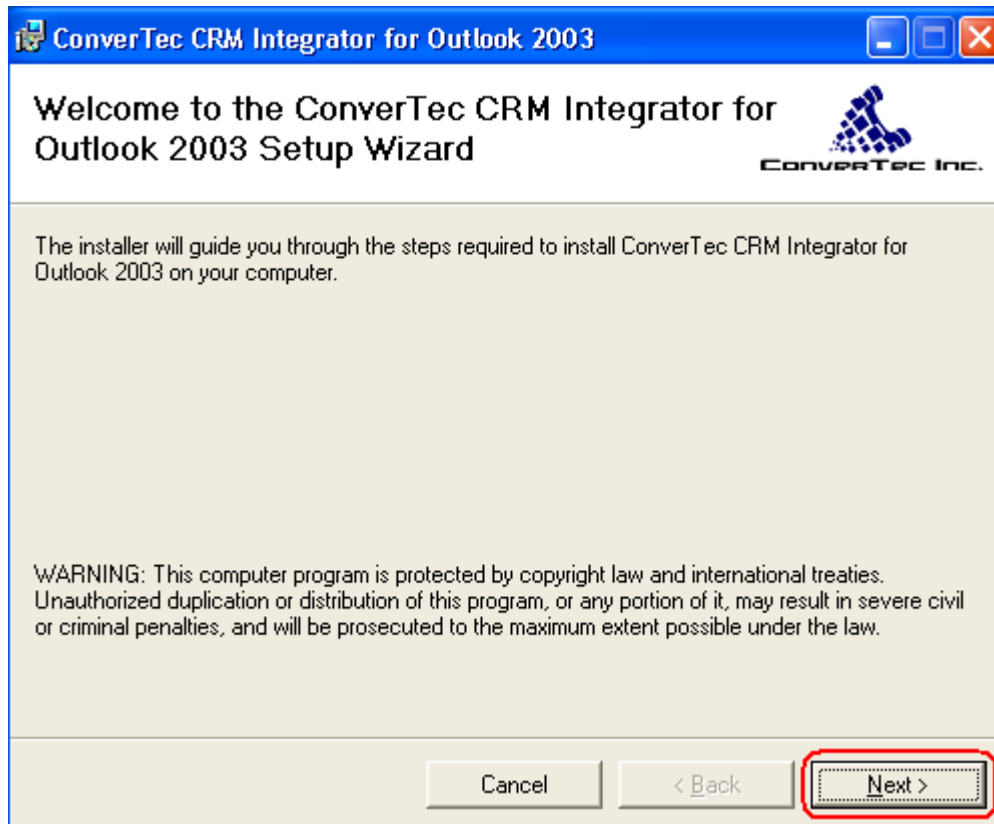
If the program was downloaded, open the "CRM" folder and click on "Setup.exe", if you are installing from the CEO Suite CD, click on "Install CRM Integrator"



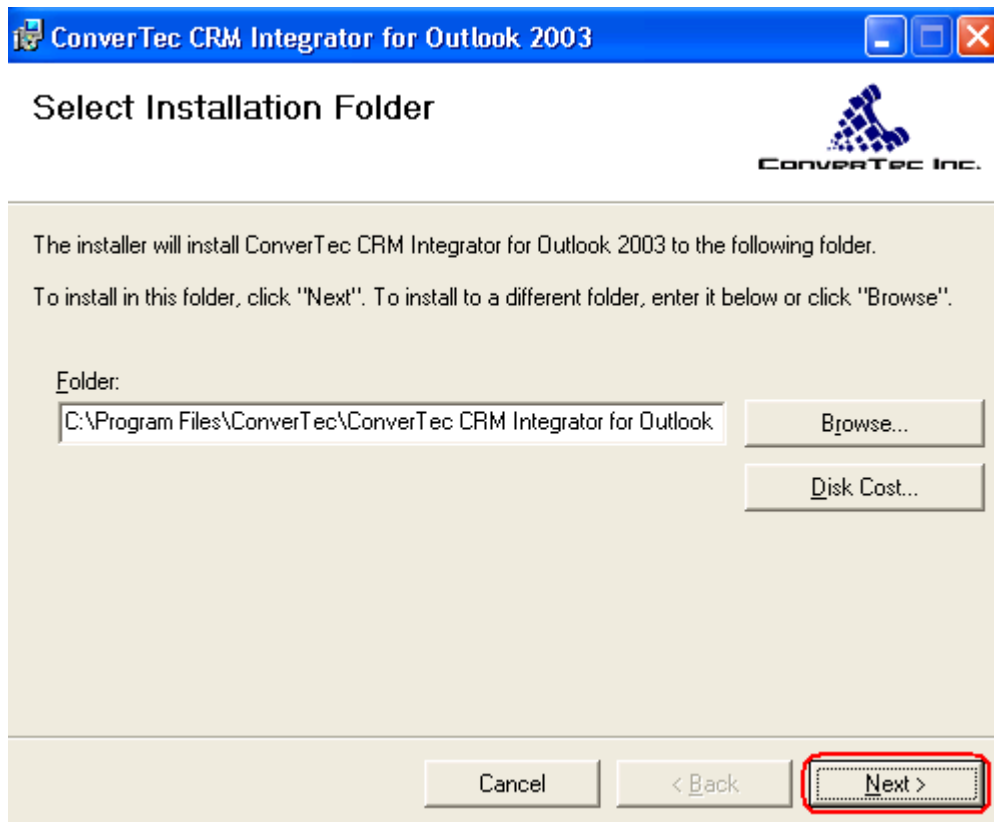
Choose your version of Microsoft Outlook from either 2003 or 2007 and click "Continue"



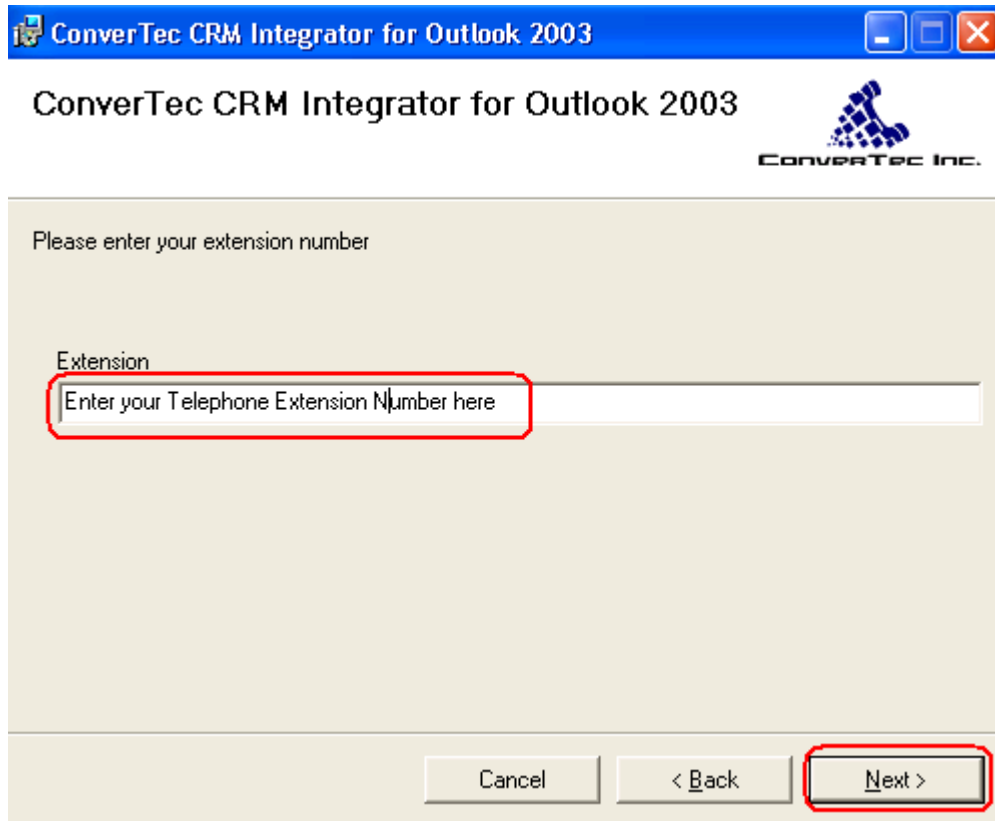
You may be prompted to accept various Microsoft licensing agreements for additional required components. Click Accept in order for a successful installation.



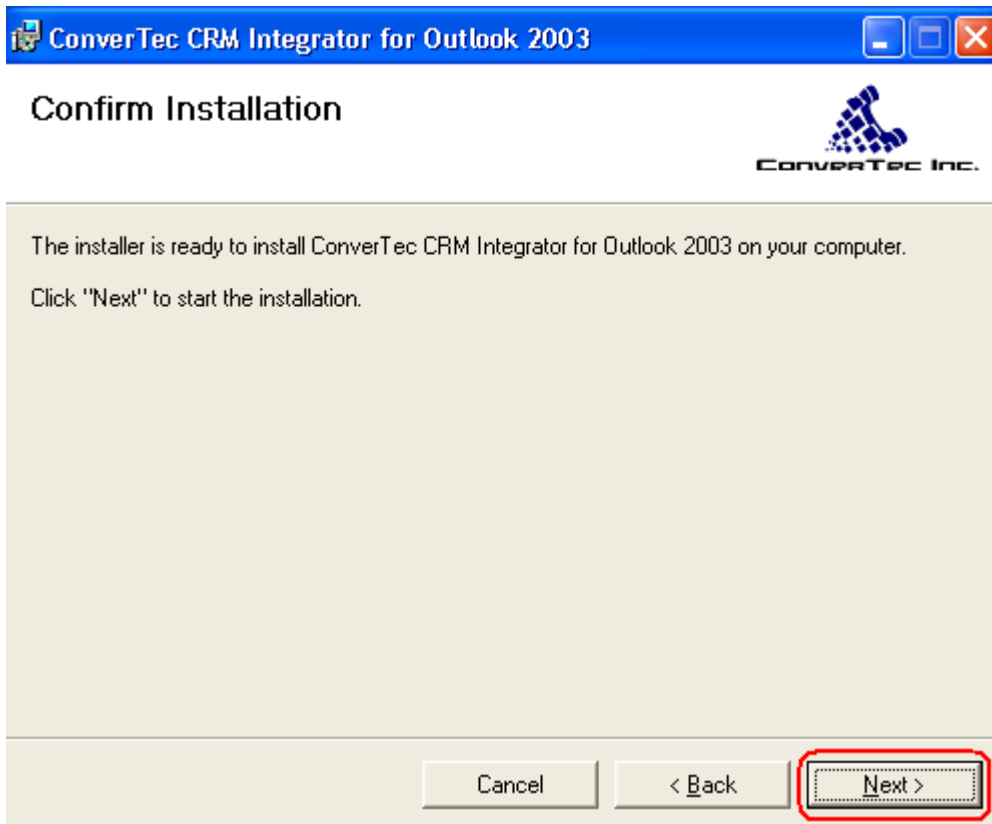
Click **Next** to begin Installation of CRM Integrator for Outlook



Click **Next** to start the installation in the default directory



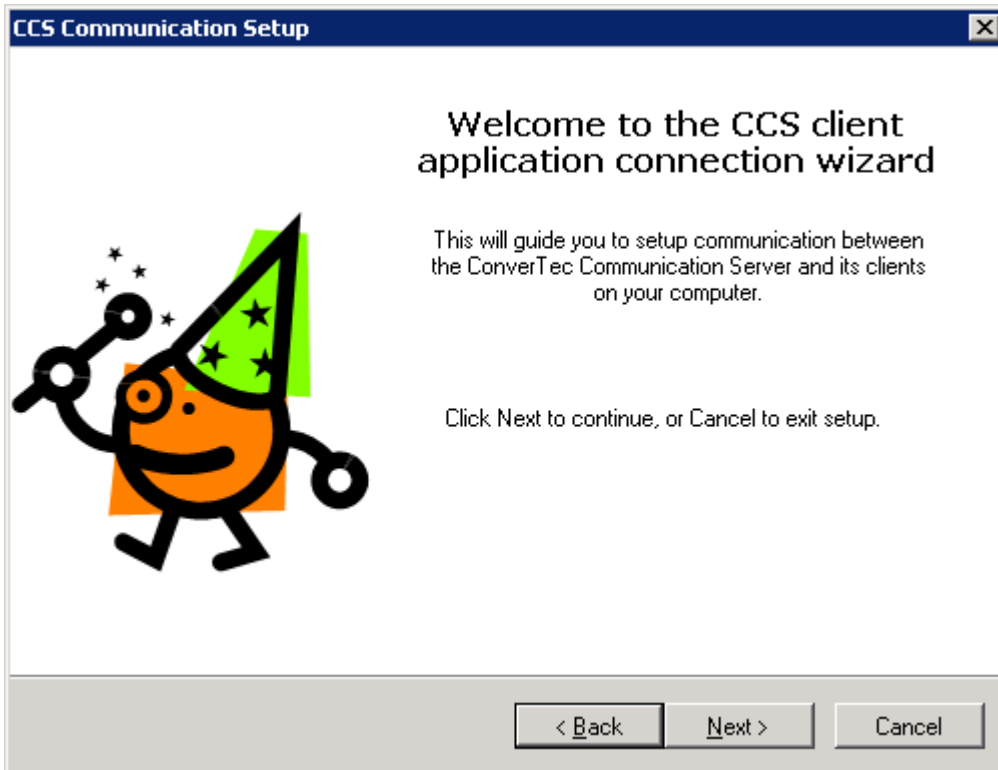
Enter your Telephone Extension number that CRM Integrator for Outlook will be interacting with.



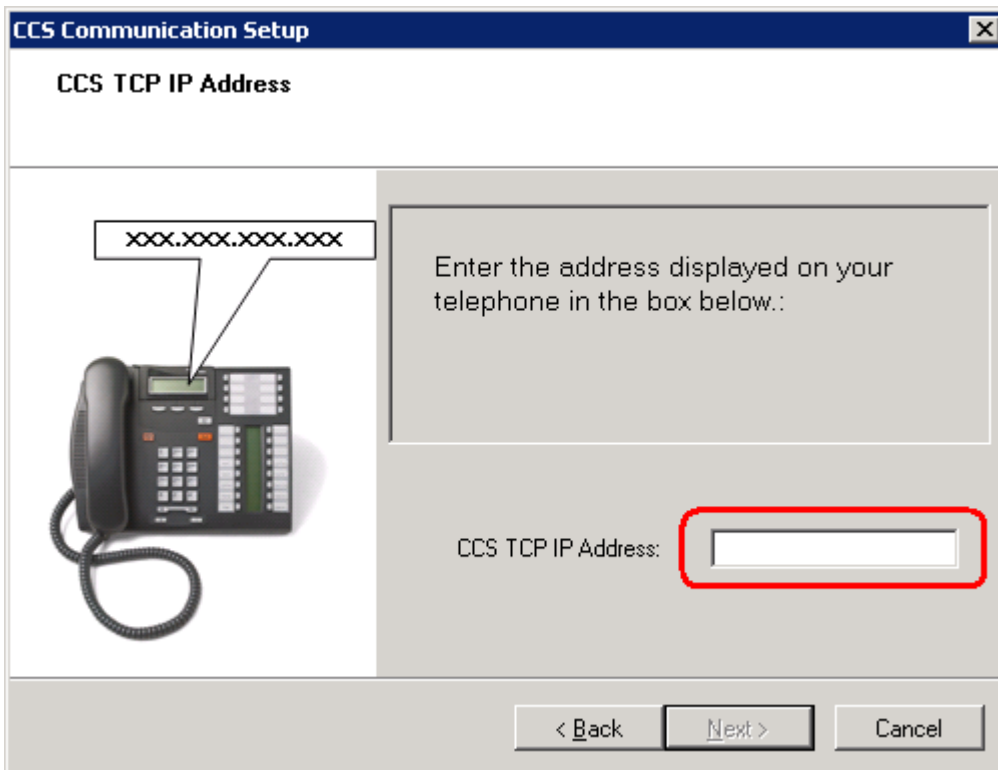
Click **Next** to complete the installation.

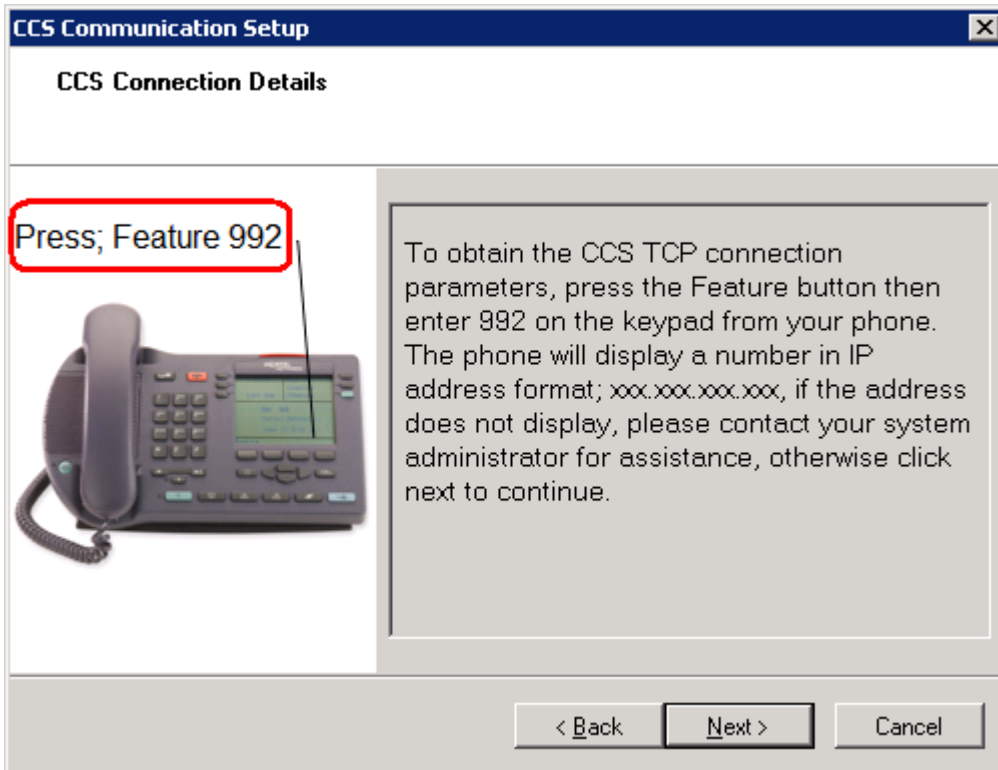
#### Client Connection Wizard

After the installation is complete, the Client Connection Wizard will open



Click "Next" to continue





Press the "Feature button on any Nortel phone followed by number 992. The telephone display will provide you with a number in IP address format. You will need to enter this number on the next page. Click on "**Next**" when you are ready to proceed.

Note: If Feature "992" responds on the telephone with "Inactive Feature", please ask the installer or system administrator to ensure that the server installation is complete and if necessary refer to the "CEO Suite Installation guide".

CCS Communication Setup

CCS TCP IP Address

xxx.xxx.xxx.xxx

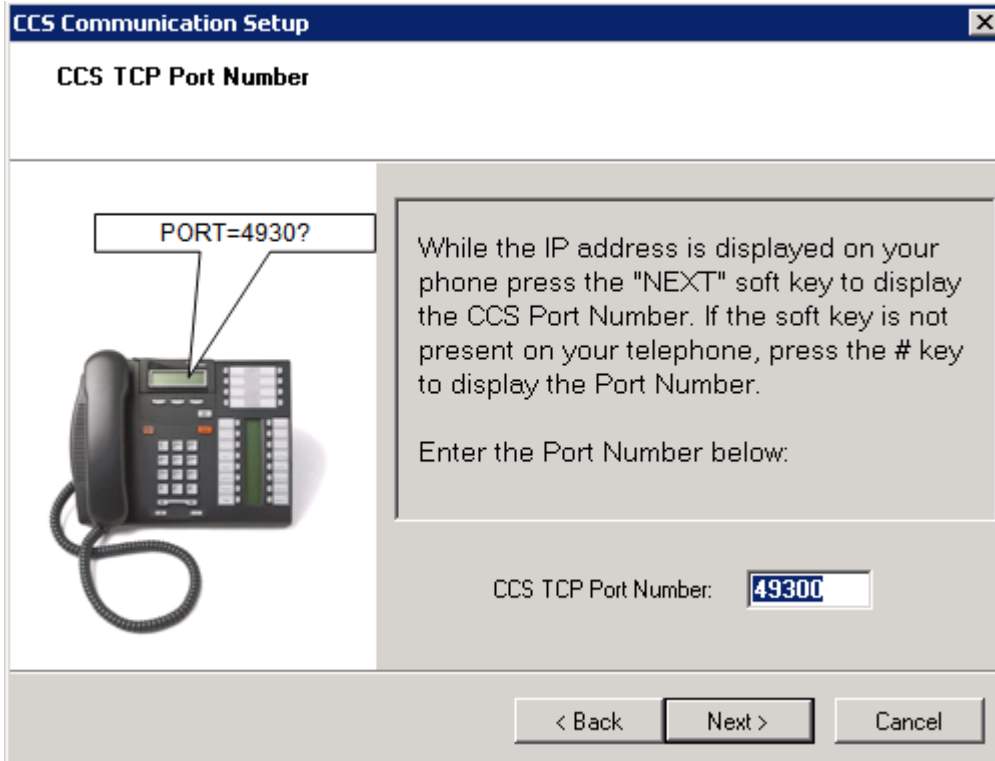
Enter the address displayed on your telephone in the box below:

CCS TCP IP Address:

< Back   Next >   Cancel

Enter the IP address shown on your telephone from the previous step. If the number starts with a zero like "127.004.001.057", it can be entered the same way or as "27.4.1.57". Click **Next** to continue.

Note: If you get a message "The IP address cannot be accessed from this computer", Click "OK" and make sure you entered the IP address correctly. If you continue to experience the problem, please seek assistance from your Network Support and advise them that port TCP/IP ports 49300 and 1433 must be un-blocked.



This value (49300) should be left by default unless otherwise instructed. Click "Next" to continue.

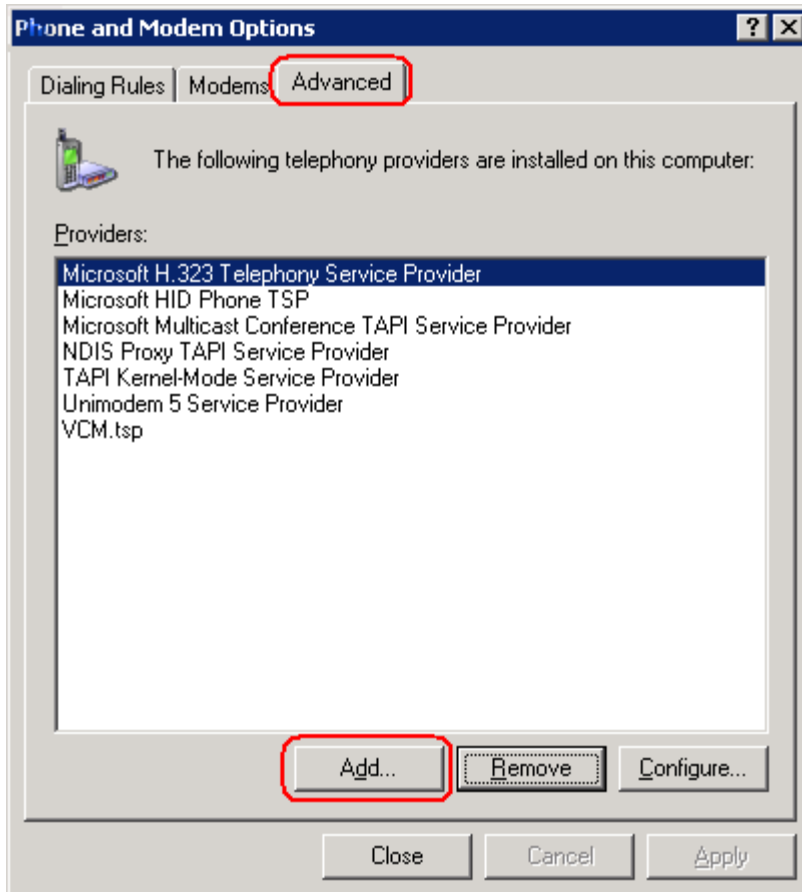


Click "Finish" and launch the CALL Navigator desktop shortcut again.

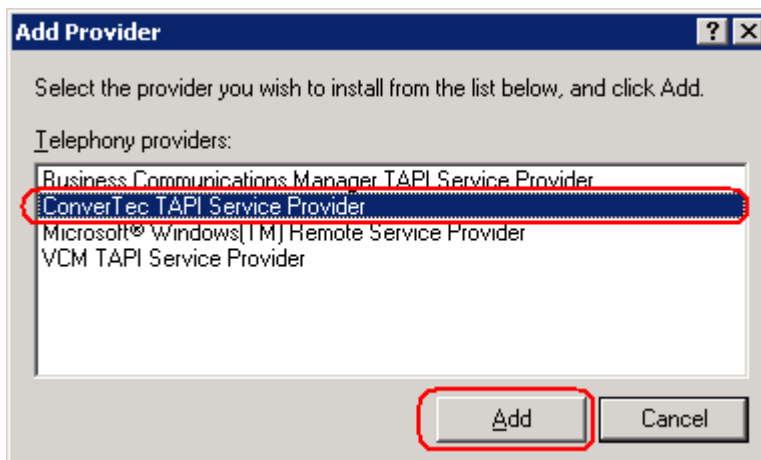
## Configuring TAPI

### Installing TAPI

Open "Phone & Modem Options" from within Windows Control Panel.

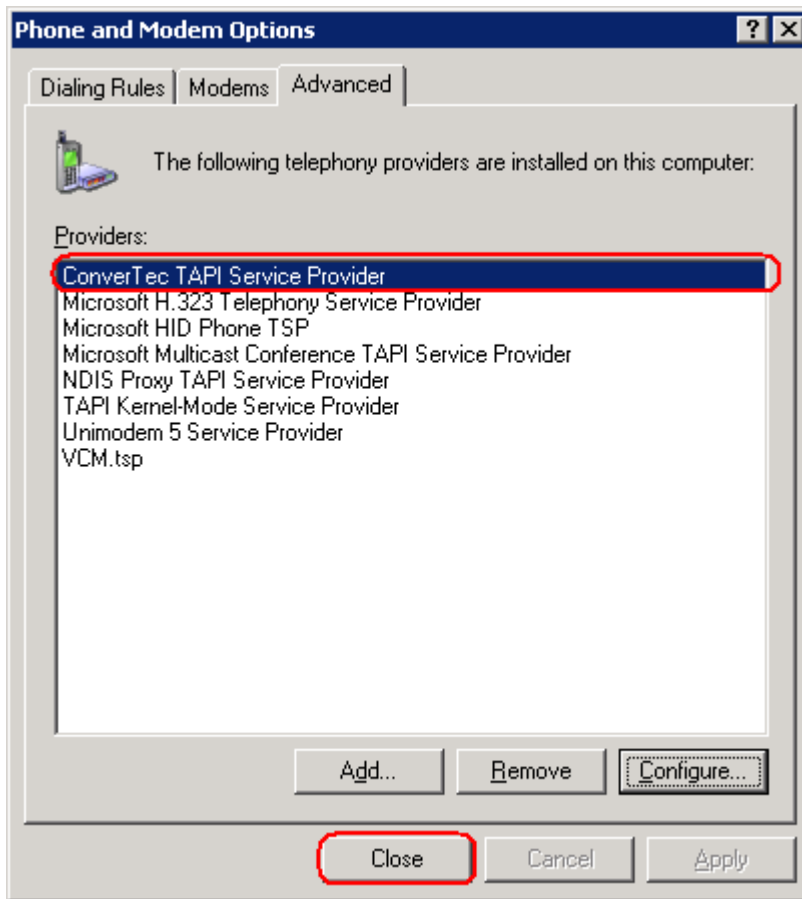


- o Click on the "Advanced" tab
- o Click on the "Add" button



When the "Add Provider" widow opens, Click on the ConverTec TAPI Service Provider and then click "Add"

The ConverTec TAPI Service Provider now appears in the list of Providers.

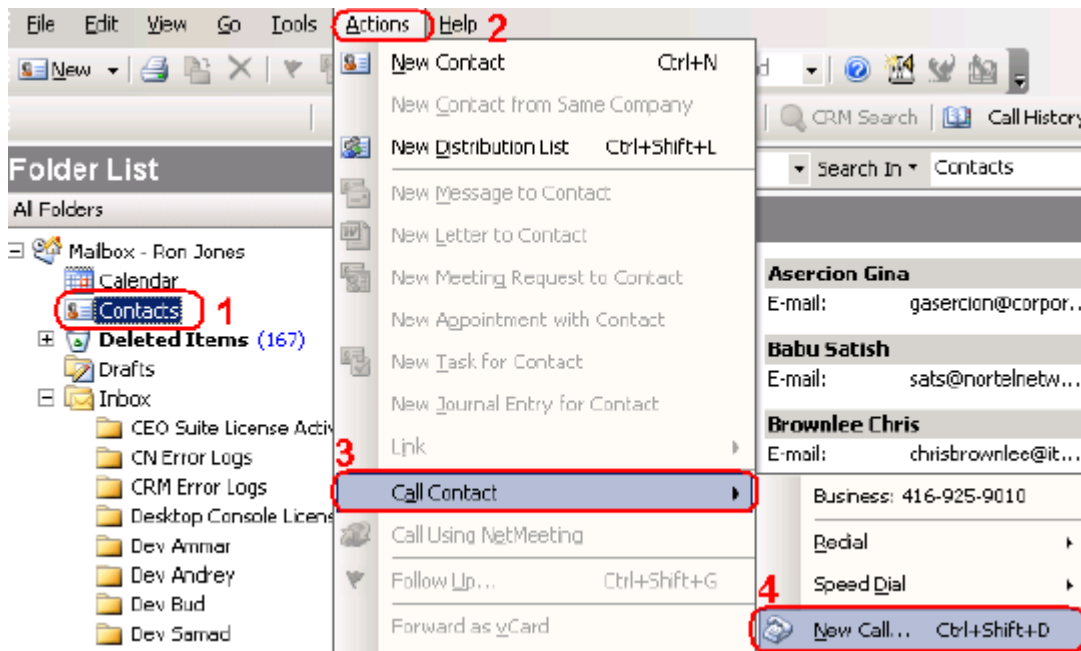


Click on the "Close" button.

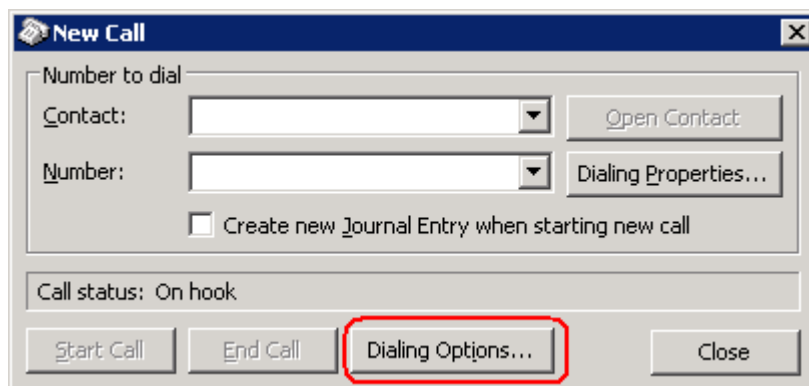
### Configure Outlook for ConverTec TAPI

If Outlook is already open, close and re-open it. Open the Contacts folder and click on the following;

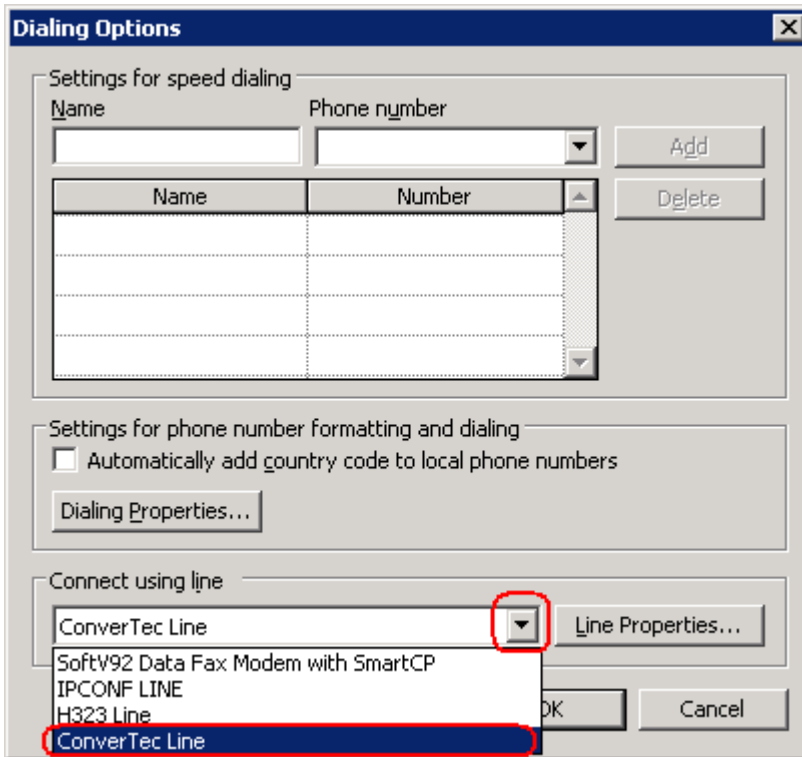
- Actions
- Call Control
- New Call



When the New Call window opens, click on Dialing Options



Under the "Connect using line", click the drop down and select "ConverTec Line". If it is not present in the available selections, reboot your Computer and follow the instructions again.



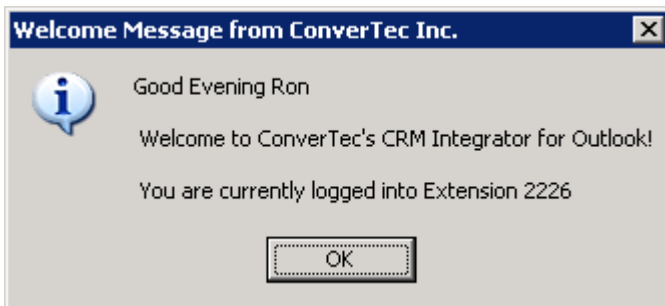
Click on "OK" to apply the ConverTec line dialing selection.

As long as the "Connect Using Line: ConverTec Line" is selected, all dialing from Outlook will be made through your telephone extension that was selected for integrated within the CRM for Outlook plug-in.

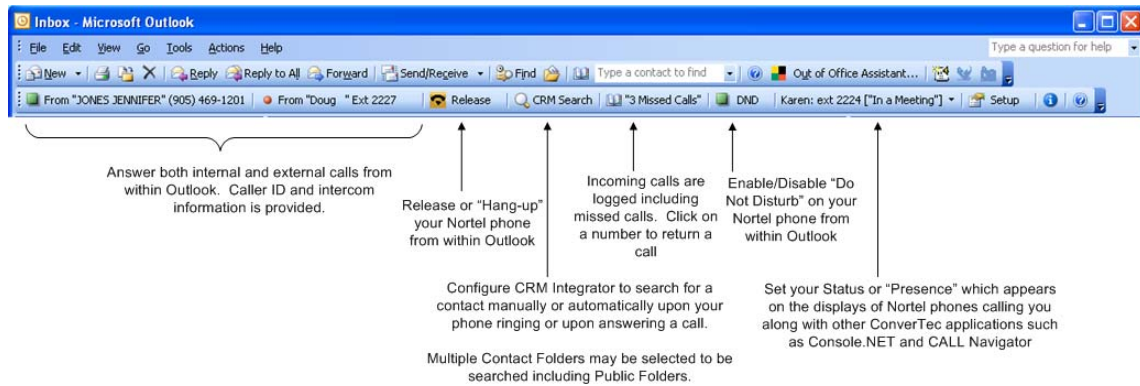
## Operating The Toolbar

### Loading the Toolbar

The Outlook Toolbar will automatically load when Outlook is opened after the installation is completed.



The welcome message will appear when the Toolbar loads. The Welcome Message can be disabled in Setup.



## Toolbar Description

### Call Buttons 1 & 2

The call buttons are similar to intercom buttons on your telephone; these buttons are fixed and cannot be added or removed. The buttons display up to two ringing or active calls. If your telephone has more than two intercom keys, calls appearing on those additional keys are not visible in this toolbar and must be controlled from the telephone. The buttons display the following states;



**Idle** – The button is blank until a new call rings or is picked up from the telephone.



**Ringing** - The button displays a red circle indicating the call that is ringing. Clicking anywhere on the button will answer the ringing call at your telephone; this answer capability is useful if you wear a headset. Within the first few seconds of a ringing call the CLID information is displayed (if present).



**Active** – The button displays a green square indicating the current active call that is connected. CLID information is displayed for incoming calls and the number dialed is displayed for outbound calls.

### Release



Clicking on the Release button will disconnect your current call. If no call is present, the Release button is displayed in an inactive state.

Note: It is possible that a call may be present on your telephone and does not appear on your "Call Buttons", in such a case, release the call from the telephone.

### CRM Search



The CRM Search button can be clicked during an active call and will search for an Outlook Contact matching the phone number of the caller. Although the Search button is able to be pressed during any active call, the search is only performed for External Inbound calls equal to or greater than 7 digits in length. Calls placed outbound are not searched. If there is no active call, the search button appears in a disabled state.

### Call History / Missed Calls



This button has two states.

**Call History** is displayed if no new calls have gone unanswered since you last viewed the Call History.

**Missed Calls** is displayed if calls have rung at your telephone and not been answered before the caller hangs up or gets forwarded to another phone or Voice Mail. The number of missed calls is displayed for local extension calls as well as external incoming calls. After clicking on the Missed Calls button, the Call History window opens displaying the answered and unanswered calls and the Missed Calls counter is reset to zero.

Note: Calls that do not contain a name or number are not logged as a Missed Call and do not appear in the Call History window.

#### DND

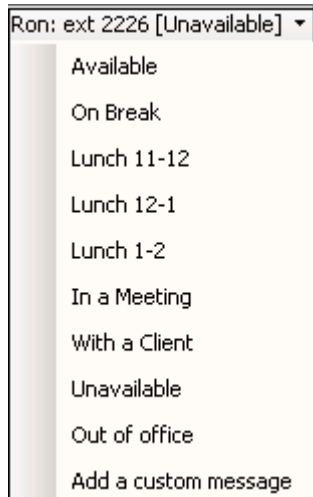
When the button is displaying a green square, your telephone is in normal mode for taking calls. When the button is displaying a red circle with a line through it, your telephone is in "Do Not Disturb" mode. Clicking on the button will toggle the DND feature on or off.

Note: For users on a Nortel Norstar system it is possible that the DND state can become un-known. If the state is not correct in the toolbar, turn DND off from the telephone set by pressing (Feature, Pound, 985). Re-apply DND from either the telephone or the Outlook toolbar to re-establish the correct DND state.

#### Status Selection



Status selection provides user with ability to provide information to an Attendant or any internal telephone calling your phone. Click on the drop down selector to choose from any of the pre-defined messages or choose to apply your own custom message. To cancel a Status message, simply select "Available" from the list of messages.



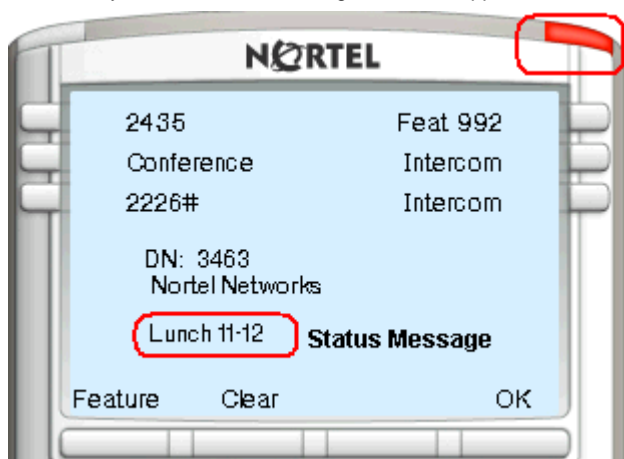
To apply a customer message, click on the "Add a custom message". Type your custom status message and click "Send"



Note: Custom messages are not saved to the default list. You must type a new message each time a Custom message is to be applied.

When a pre-defined or custom message is set, that message will display in the following manner;

Users Telephone – The telephone extension integrated to the CRM for Outlook plug-in will turn on the message indicator to remind you that a status message has been applied.



Other Office Phones - Any local telephone extension calling your telephone will see the applied status message scroll across the screen of their telephone.

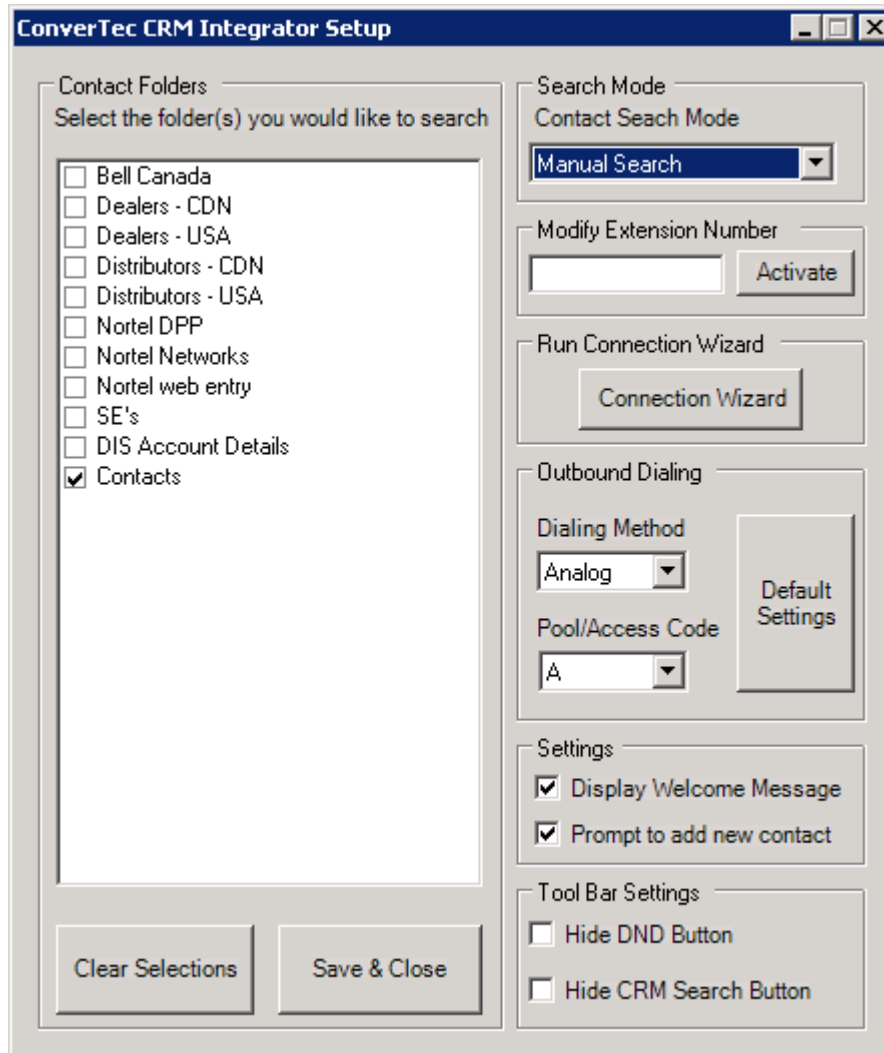
CALL Navigator Client(s) – Users of CALL Navigator are able to see all applied statuses for all extensions on any connected telephone system(s). Call Navigator users also have the ability to apply or remove status messages. Messages applied by a CALL navigator user will also update on the Status Button within the Outlook Plug-in.

Note: Status messages can be applied or removed from any of three ways.

#### Setup



Click on Setup to open the Toolbar setup and options page. This page allows you to specify your Contact folders that you want to search, set your dialing options and turn on/off other features.



## Contact Folders

Select the contact folder(s) that is/are searched using the phone number of the ringing or answered call. The phone number displayed from the incoming call will be searched through all phone fields for the selected Contact folder(s).

## Search Mode

Choose the appropriate method for performing a search on the selected Contact folders.

- Search Contact on Ring – When the phone rings and the caller information is detected, a search is immediately performed. In most cases the search results are displayed prior to answering the call.  
**Note:** This option is only intended for telephones programmed to receive one call at a time since additional ringing calls would continue to override the previous search.
- Search Contact on Answer – When the incoming call is answered, the caller information is immediately searched for a match in the selected Contact folder(s).
- Manual Search – During an active call, clicking on the Search button located within the toolbar will initiate the search of the incoming call based on the selected Contact folders.

## Run Connection Wizard

The connection wizard is initially run when the software is installed. If the server is un-reachable, the toolbar will appear in a disabled state. If the Server IP address has changed, running the connection wizard may help to determine and set the new server IP address to get the toolbar functioning again.

## Outbound Dialing

**Dialing Method** – When dialing out from a TAPI compliant applications such as Outlook, these dialing options are used for the outbound call on your telephone extension. Choose from Analog, RPR1/R1 or Routing. These settings should not be modified unless your telephone system administrator has provisioned a new dialing method.

- **Analog:** Used in conjunction with the specified Pool Selection from A-O. Customers with analog lines are usually associated to pool A in the majority of cases. When dialing numbers from Outlook, the access code is not required to be stored in the number, it is automatically dialed by the server.
- **PR1/T1:** If your system is connected to digital trunks and you normally dial an access code such as 9 or 8, select this option followed by the digit in the Pool Access Code selection. When dialing numbers from Outlook, the access code is not required to be stored in the number, it is automatically dialed by the server.
- **Routing:** The outbound dialing is automatically determined based on the digits dialed as stored in the TAPI application such as Outlook.

**Note:** Windows Phone & Modem options allow you to set specific dialing rules in place for calls placed by TAPI compliant applications such as Outlook. The phone numbers stored in Outlook may be dialed differently based on those dialing rules. The dialing functionality of this plug-in dials the number as received from the Windows TAPI request after it has been formatted with the dialing rules.

**Pool Access Code** – Available selections are based on the Dialing Method selected. If Analog is selected, pool codes from A-O are valid selections. If PR1/T1 is selected, available options are based on PR1 access digits assigned on the server. In most cases, only one option will be present for selection.

**Default Settings** – The server is programmed for the best dialing method during installation of the server software. Clicking this button will restore the settings suggested by the system administrator.

## Settings

**Display Welcome Message** – Each time outlook is opened and the toolbar is loaded and connected, the welcome message appears displaying the extension that you are connected to. If there is a break in connection to the server and the connected is restored while Outlook is open, the welcome message will appear again. The welcome message can be disabled by removing the checkbox.

**Prompt to add new Contact** – When a search is performed in the Contact folder(s) and a matching record is not found, a new Contact is created containing the name and number of the caller. If this option is checked, you will receive a prompt asking if you would like to create a new Contact. If the option is not checked, the new Contact window will automatically open.

**Note:** New Contacts are created in the local Contact folder by default. There is not way to select a specific Contact folder to create new records in.

## Toolbar Settings

**Hide DND Button** – Selecting this option will remove the DND button from the toolbar. Uncheck to enable the button again.

**Hide CRM Search Button** – Selecting this option will remove the CRM Search button from the toolbar. Uncheck to enable the button again.

### Information



Provides links to ConverTec Website and E-mail for Sales and Support. Also displays CRM Integrator version number and provides a link to send log files to support for troubleshooting purposes.

### Help

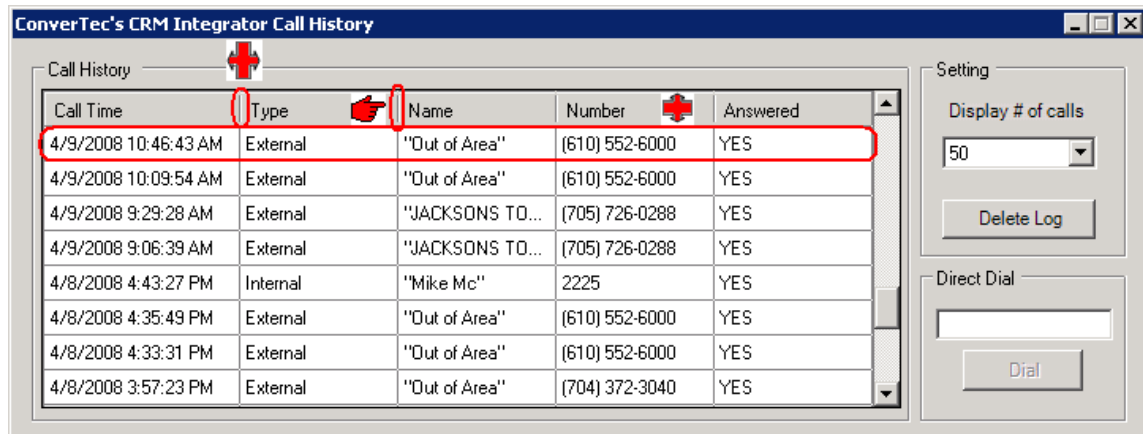


Open the web based help files for CRM Integrator for Outlook

## Call History Window

The Call History window tracks all incoming calls to the telephone extension that it is associated with as long as Microsoft Outlook is open. The window is capable of displaying as many calls as required from the Call Log. Columns can be re-sized by dragging the divider bar left or right. Double click on the divider bar to automatically resize the column to fit the information. The data is automatically sorted by most recent Call Time at the top, descending to oldest call times. Data Columns can also be clicked on to sort the data by order of ascending or descending values, for example; clicking on the "Type" column will sort all the External calls together followed by Internal Calls. Click again will reverse the calls to sort by Internal followed by external.

**Note:** Custom sorting is temporary while the Call History window is open. Closing and re-opening the Call History window will revert to sorting by order of most recent to oldest calls.



### Call History Details

**Call Time** – The Date & Time the call started ringing at the telephone. All calls are sorted from most recent to oldest calls by default. Click on the "Call Time" heading to reverse the sort time from oldest to newest.

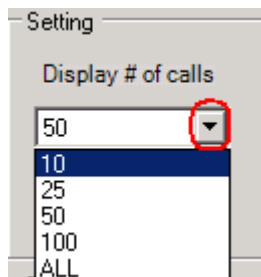
**Type** – Calls are categorized as a call from an outside source being External and an intercom call from a local extension being internal. Click on the "Type" heading to sort the calls by External or Internal.

**Name** – If available, displays the name provided for the inbound call. Click on the "Name" heading to the calls alphabetically by name.

**Number** – If available, display the number for the inbound call. Click on the "Number" heading to sort the calls by order of number. This is useful when trying to locate the time and date of a specific number that called you.

**Answered** – Indicates whether or not the incoming call was answered or not. Click on the "Answered" heading to sort the calls by Answered or Unanswered.

### Setting



**Display Number of Calls** – Choose how many calls you want to be shown in the Call History window. Each time you open it. When a Call log contains thousands of records, it can help to display a smaller number of records instead of "All" records.

**Delete Log** – Deleting the log will erase all past call from the log.

**Tip:** Hovering over the Call History button provides a Microsoft tooltip displaying how many calls are contained in the log.

**Note:** The log has no limitation to how large it can become. Approximately 1 Megabyte of Hard drive space is required for every 14,280 calls logged.

### Direct Dial

**Input Field** – Enter a telephone number that you would like to Dial. Numbers can be cut and pasted in this window. Enter the number as you would dial it from the telephone with the exception of access codes such as 9 or 8.

**Dial** – Click on dial to place a call to the number entered in the field above. If a call is already active when the Dial request is made, the existing call will automatically be placed on hold.

## Contact Searching

One of the Key features of CRM integrator for Outlook is the Contact searching capability. Searching can be performed manually or automatically based upon the setting in the Setup page.

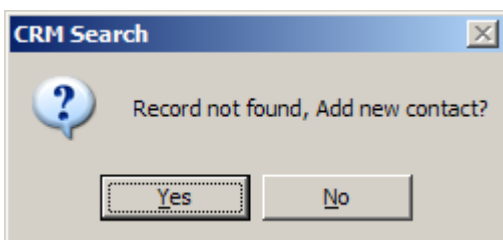
Searches of incoming CLID number are performed on all phone fields within the selected Contact folder chosen within the Setup page.

If a single contact is found matching the number being searched, the Contact will automatically open and display the Contact information. This Contact window is no different than the one that opens when you open a contact manually.

If multiple Contacts are found with the phone numbers being searched, all relative matches are displayed in the Search Results window. Double click on the Contact record that is to be opened. The Contact opens and the search results window closes.

Company	First	Last	Number	Type	Folder
Rehab Clinic	Amy	Winehouse	(905) 469-1201	Business	Contacts
	JONES	JENNIFER	(905) 469-1201	Home	Contacts

### Record Not Found



If no matching record is found for the phone number being searched, a New Contact can be automatically created with the Name and Number fields populated from the Name and Number of the caller. If you prefer not to have a new Contract automatically created, an option can be turned on in Setup to "Prompt for a new Contact". If you choose to use the Prompt method, click on "Yes" to create the new contact.

**Note:** The name is populated in the field name "Full Name" and the number is populated in the "Business Phone" field. All new Contacts created by CRM integrator all automatically added to your Local Contacts folder.