

# Alti-MSCRM<sup>™</sup>2.0

# for AltiWare Open Edition (OE/ACC) Release 5.0,

and AltiContact Manager (ACM) Release 5.0

# Server and Client Manual

Revised 04/2004

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# Contents

Introduction1
About Alti-MSCRM1
New in Version 2.0
Package Contents
Microsoft CRM Server Hardware and Software Requirements 2
Alti-MSCRM Client Hardware and Software Requirements 2
Alti-MSCRM Upgrade Path 3
Installation
Installing and Configuring Alti-MSCRM Server
Installing and Configuring Alti-MSCRM Client
Microsoft Issues
Alti-MSCRM Screen Pop Configuration13
Alti-MSCRM Status
Tag Definitions
Extension Configuration16
Operational Notes
DNIS/Workgroup Configuration
Operational Notes:
Sample Scenario
Sample Answer Guider
Microsoft Business Solutions Customer Relationship Man-
agement
Index

Alti-MSCRM Manual iv

# Introduction

# About Alti-MSCRM

Alti-MSCRM is a Microsoft<sup>®</sup> .NET-connected integration tool that provides CTI integration for Microsoft CRM. Companies implementing Microsoft CRM for sales and service automation can further enhance employee productivity by integrating contact center screen pop capability from AltiGen.

AltiGen's Microsoft CRM integration offers the following capabilities to contact center agents' desktops through the AltiAgent client:

- Defining of individual workgroup preferences to screen pop one of the following Microsoft CRM web pages:
  - Contact page based on caller ID or caller-entered 10 digit phone number
  - Account page based on caller ID or caller-entered 10 digit account number
  - Order page based on order number
  - Case page based on case ID
  - Invoice page based on invoice number
  - Contract page based on contract number
  - Product page based on product ID
- Use of dialed number (DNIS) to pop one of the above Microsoft CRM web pages for a workgroup call.
- Service agent can belong to multiple groups and pop different Microsoft CRM web pages for different workgroup calls.
- Contact page screen pop is also available at the extension user desktop through AltiAgent client.
- Centralized web-based management and local configuration for Windows control.
- Option to create new Microsoft CRM entry for each call or update existing entry.

• Option to minimize Microsoft CRM window when call is completed.

# New in Version 2.0

- Answering script for workgroup agents
- <u>Search and dial buttons</u>
- Call logging
- Data loading performance optimization

# Package Contents

The following items are included in the Alti-MSCRM (v1.5) package:

- Alti-MSCRM Manual (PDF)
- Alti-MSCRM Server (installed on Microsoft CRM server)
- Alti-MSCRM Client (installed on client PC with AltiView or AltiAgent

# Microsoft CRM Server Hardware and Software Requirements

Please refer to Microsoft CRM configuration guide for Microsoft CRM server hardware and software requirements.

# Alti-MSCRM Client Hardware and Software Requirements

### Hardware Requirements

• Computer: Pentium 3/4 (1.0 GHz or higher with 256 MB RAM)

### Software Requirements

- AltiWare 5.0 RTM, AltiClient 5.0 RTM
- <u>AltiContact Manager 4.6 SP1</u>, AltiWare OE 5.0, AltiServ Contact Center 5.0, or AltiContact Manager 5.0 Software
- AltiClient 5.0 (or higher)

- Microsoft Windows 2000 (Server or Professional), or Microsoft Windows XP (Professional).
- Microsoft Internet Explorer 6.0 with Service Pack 1 or later.
- Microsoft Windows 98 Second Edition (compatible but not recommended)
- Note: Alti-MSCRM 1.5 can work with ACM 4.6 SP1 or ACM 5.0, but Alti-MSCRM 1.5 and ACM 5.0 cannot be installed in the same machine.

# Alti-MSCRM Upgrade Path

Alti-MSCRM can only be upgraded from version 1.5 to version 2.0.

Alti-MSCRM Manual 4

# Installation

Installation of Alti-MSCRM requires two steps — installation of the Alti-MSCRM Server and installation of the Alti-MSCRM client. Alti-MSCRM also uses **AltiCRMItgServ**, a type of service that provides integration service between AltiWare and Microsoft CRM.

Note: When making changes in the Alti-MSCRM Server configuration screen, the Services window should be closed and AltiCRMItgServ service should be disabled/stopped. When registering Alti-MSCRM Integration, the Services window should be closed. If left open, the AltiCRMItgServ service will be removed and you will not be able to register Alti-MSCRM Integration.

# Installing and Configuring Alti-MSCRM Server

**Note:** To install Alti-MSCRM server, you should first install DotNet Framework 1.0 and SP2, then upgrade to the latest DotNet framework version (currently 1.1).

#### To install and configure Alti-MSCRM Server:

- 1. Install Alti-MSCRM Server at the Microsoft CRM Server machine by running the **Setup.exe** file from the **Server** folder. This creates the **Alti-MSCRM Server** program folder accessible from the **Start** menu, which consists of the following:
  - Alti-MSCRM Server Screen Pop Configuration one of two configuration screens for Alti-MSCRM, which invokes a *web-based* window for configuring Alti-MSCRM screen pops (Tag Definitions, settings for extensions, and screen pop rules based on DNIS/workgroups.)
  - Alti-MSCRM Server Startup Configuration the second of two configuration screens for Alti-MSCRM, which invokes the *initial* configuration window for Alti-MSCRM Server.
  - Alti-MSCRM Server Uninstall uninstalls the Alti-MSCRM program and file folders.

2. Open the Alti-MSCRM Server Startup Configuration window by going to Programs>Alti-MSCRM Server>Alti-MSCRM Server Startup Configuration.

🐴 Alti-MSCRM Server S	itartup Configuration			×
Microsoft CRM Server S	ettings			
MSCRM Root http://	/10.100.1.218	_		
Install MSCRM Ev	ent Handler			
SQL Server Addr.	10.100.1.119	META DB	Adventure_Works_Cycle_METABASE	
User(DBO)	sa	Password	xxxxxxxx <u>I</u> est DE	
Alti-MSCRM Server Log	on Settings	AltiWare	Logon Settings	
C Local System Acco	unt	AltiSer	v Address 10.100.1.116	
O Domain Account	Administrator	Logon	Ext. 274	
Password	*****	Logon	Password *****	
🗖 Register Alti-MSCF	M Service upon exit		AW Logon Test	
			K Cancel <u>Apply</u> <u>H</u> el	<u>,</u>

Figure 1. Alti-MSCRM Server Startup Configuration window

- 3. In the Microsoft CRM Settings section:
  - a. **MSCRM Root** enter the web site IP address and directory path to the Microsoft CRM Server Root directory.

Note: Use the IP address for the Microsoft CRM Root field.

- b. **Install MSCRM Event Handler** check box selected, enables the following options:
  - SQL Server Address the SQL server's IP address where MSCRM can connect to.
  - META DB database created by the MSCRM server. The user can use SQL server enterprise management to access the database (stored as "*filename\_METABASE*.")
  - User (DBO) the user who can connect to the SQL server and acts as a database operator.
  - **Password** the password for the database user.

#### **IMPORTANT NOTES:**

- During the installation procedure, the **Install MSCRM Event Handler** check box is checked by default and cannot be unchecked, which means the user must enter the correct database parameters when installing Alti-MSCRM Server 1.5.
- The event handler will use the domain account to logon, so the user must enter the correct domain account and password, even if **Register Alti-MSCRM service upon exit** option is not checked.
- Clicking the **Apply** button will save all settings but not install the event handler, the event handler will be installed when clicking **OK**. A message box will pop up to indicate the installation result.
- c. **Test DB** uses the current database setting to connect to SQL server and returns test results to the user.
- 4. Alti-MSCRM uses MSCRMSDK services, which much use the Microsoft CRM Server's role user to logon. In the Alti-MSCRM Server Logon Settings section, input a valid Domain Account (<Domain>\Administrator) and Password for Microsoft CRM Server for Integration Service logon.
- 5. When installing for the first time, the **Register Alti-CRM Integration Service when exit** check box is grayed out because Alti-MSCRM will register the service automatically. If the user runs the startup configuration in the future, the check box will be available — when selected, the integration service will be registered upon exit.

Also, make sure the **Services** window is closed. Otherwise, the Alti-MSCRM Service will not be created in the Services window.

- 6. In the AltiWare Logon Settings section, enter the AltiServ Address, Logon Extension (you can enter any extension that can log you into the AltiWare system) and Logon Password.
  - **Note:** To avoid integration failure due to changing the extension password, you can create an integration extension, which will be dedicated as the Alti-MSCRM integration logon extension and keep the password unchanged.
- 7. Test the connection to AltiWare by clicking the **AW Logon Test** button.

8. Start the Alti-MSCRM Service from the Services window.

🍇 Services				
] <u>A</u> ction ⊻iew ] ← →	🛍 📧   😭 🚱 🖳	😫  ] 🕨		Þ
Tree	Name 🛆	Description	Status	Sta
Services (Local)	🆏 Alerter	Notifies sel	Started	Aut
	Alti-MSCRM Service		Started	Aut
	🏶 Application Manage	Provides s		Mar
	🏶 ASP.NET State Serv	Provides s		Mar
	🍓 Automatic Updates	Enables th	Started	Aut
	🏶 Background Intellig	Transfers f	Started	Mar
	🆏 ClipBook	Supports C		Mar
	🏶 COM+ Event System	Provides a	Started	Mar
	🏶 Computer Browser	Maintains a	Started	Aut
	🏶 Crystal APS	Provides sc	Started	Aut
	Crystal Cache Server	Stores rep	Started	Aut

Figure 2. Alti-MSCRM Service, Services window

# Installing and Configuring Alti-MSCRM Client

#### Notes:

- If the AltiWare system associated with Alti-MSCRM is changed or needs to be changed, the user also needs to restart AltiClient to point to the new AltiWare system. Also, if both systems share the same AltiClient extensions, and you are switching between systems, make sure the AltiClient extension from the first system disconnects from Alti-MSCRM before launching the AltiClient extension with Alti-MSCRM on the other system. (Please note the Alti-MSCRM Client of the first system will still remain active even though the user disconnects the first system from Alti-MSCRM Server. Also, Microsoft will still count both sessions as licensed users.)
- If a machine is running two AltiAgent applications, Alti-MSCRM Client will only recognize the AltiAgent application that was first registered with the COM Server.

#### To install Alti-MSCRM Client (at Agent User's Machine):

1. Start AltiAgent.

**Important:**Alti-MSCRM *must have* AltiAgent logged in to make the connection to the CRM server.

- Install Alti-MSCRM Client at the agent user's machine by running the Setup.exe file in the MSCRMItg\Client\ folder. This creates the Alti-MSCRM Client folder, which consists of the following:
  - Alti-MSCRM Client opens the login window for the Alti-MSCRM Client.
  - Alti-MSCRM Client Uninstall uninstalls the Alti-MSCRM Client program and file folders.

3. The installation will run Alti-MSCRM Client the first time after installation and launches the following **Alti-MSCRM Client** login window.

Alti-MSCRM Serv	ver
Create new v	vindow for screen pop
Minimize wind	dow after call complete

Figure 3. Alti-MSCRM Client login window

- **Note:** The installation will put Alti-MSCRM Client in the "Start" menu, so that if the agent machine reboots, Alti-MSCRM Client can be started as well.
- 4. In the **Alti-MSCRM Server** field, enter the name or IP address for the Alti-MSCRM Integration Server.
- Check the Create new window for screen pop option to have Alti-MSCRM pop up a new window every time. If this option is selected, Minimize window after call complete option will not be available.
- 6. Check the **Minimize window after call complete** option to minimize the screen pop when the call is finished.
- **Note:** If both **Create new window for screen pop** option and **Minimize window after call complete** option are unchecked, the screen pops will re-use the same window and will not minimize when the call ends.
- 7. Click **OK** when finished.

After Alti-MSCRM Client is launched, if AltiAgent is properly connected, Alti-MSCRM Client will be indicated by a *blue* AltiGen logo in the Windows task bar AND the Microsoft CRM window will pop up. A *red* AltiGen logo indicates Alti-MSCRM Server is disconnected. A *gray* AltiGen logo indicates Alti-MSCRM is not bound with AltiClient.



Figure 4. Windows task bar

#### **IMPORTANT NOTE!**

Alti-MSCRM Screen Pop requires Microsoft Business Solutions Customer Relationship Management window to launch. If this window is not launched, Alti-MSCRM Client will automatically launch this window. The user SHOULD NOT close this window.

# **Microsoft Issues**

#### Security Service

Microsoft CRM Security Service is required for Microsoft CRM to run. Currently, the Microsoft CRM Security Service fails to start automatically when Microsoft CRM Server and SQL Server are on the same machine.

To resolve:

- 1. Log in to your Microsoft CRM server as a Domain administrator.
- 2. At a CMD prompt (Start | Run | CMD) type: cd Program Files\Microsoft CRM\server\bin
- 3. Type **CrmSecurityService -r -s**. This will register Microsoft CRM Security Service and make it dependent on SQL Server service (MSSQLSERVER). Now that it is registered, launch the Services snap-in from **Start>Programs>Administrative Tools>Services** and start the Microsoft CRM Security Service.

# Alti-MSCRM Screen Pop Configuration

After Alti-MSCRM Server and Client have been installed and connected, you can use the **Alti-MSCRM Screen Pop Configuration** page to configure the Alti-MSCRM screen pop using Microsoft Internet Explorer. To access this web-based configuration, in the address field, enter the IP address of the Microsoft CRM Server location, followed by /altigencrm/. For example, http://209.220.14.132/altigencrm/.

## Alti-MSCRM Status

The status of Alti-MSCRM is indicated at all times at the bottom left corner of the Alti-MSCRM screen. If there is a problem with Alti-MSCRM, an errors message and description of the problem will be shown next to the **Status:** field. Refresh the web page to display the most current status.



Figure 1. Alti-MSCRM Status Field

# **Tag Definitions**

L

In the **Tags Definition** web page, this information corresponds to the Alti-MSCRM Server Startup Configuration screen. Leave the default definitions unchanged. These are the tags that Alti-MSCRM will pop up when those items match in AA/IVR or User Data of an external call.

**Note:** Any time Alti-MSCRM is uninstalled, re-installed, or upgraded, this will restore the default tag definitions.

Alti-MSCRM S	erver Screen Pop Configuration	- Microsoft Internet	Explorer					_ 🗆 ×
File Edit Vie	ew Favorites Tools Help							-
↓ Back → ⇒	- 🙆 🛃 🚮 🔯 Search 👔	Favorites 🎯 Media	3 B-6	) 🗹 • 🗉	Q	 		
Address 🙆 http	://209.220.14.132/altigencrm/							• 🔗 😡
Alti-MSCRM 9	Screen Pop Configuration						Powered b	y AltiGen
📮 Save Refr	resh							
Tag Definition	Extension configuration PAILS / Ma	ulumuu eestimuutiee						
ragioennidorr	Extension configuration Divits/wo	orkgroup configuration						
Microsoft C	RM Server Root : http://10.9	9.0.102						
Too Do Anika	-							
ag Dennido	n					 		
Match Tag	Text		Match Tag	Text		_		
Account ID	accountid	]	Order ID	orderid		]		
Invoice ID	invoiceid		Case ID	caseid				
Contract ID	contractid	]	Phone Num	phonenum		]		
Product ID	productid	]						
Status: Ready					Сорунія		unications, All Rig	
ど Done							Internet	

Figure 2. Tag Definition page

#### Account ID

Pops a Microsoft CRM account page based on caller-entered 10 digit account number

#### Order ID

Pops an Microsoft CRM order page based on caller-entered order number

#### Invoice ID

Pops a Microsoft CRM invoice page based on caller-entered invoice number

#### Case ID

Pops a Microsoft CRM case page based on caller-entered case ID

#### Contract ID

Pops a Microsoft CRM contract page based on caller-entered contract number

#### Phone Num

Pops a Microsoft CRM phone number page based on phone number

#### Product ID

Pops a Microsoft CRM product page based on caller-entered product ID

#### Notes:

- When building your directory of contact information in the Microsoft Business Solutions Customer Relationship Management - MIE page, it is required that you use only numbers 1-9 for all IDs since AltiWare's AA/IVR can only use numbers for inputting. For example, if a Microsoft product number entry is ABC0001, Alti-MSCRM can match 4 digits, using **0001**. If the record is ABC1, Alti-MSCRM can only match 1 digit, using **1**.
- The Microsoft record entry should be unique, so Microsoft suggests that you use a long serial number for each record.
- For the record entry to pop up, there must be a 100% match with the call information received by AltiAgent and the Alti-MSCRM screen pop conditions.
- The Caller ID is basic call information. AA/IVR-collected data (phone number, account number, order number, invoice number, case number, contract number, product number) will be collected from the external call's AA/IVR data and User Data.
- AltiView only supports Contact/Caller ID information.
- The tag definitions are case sensitive.

# **Extension Configuration**

The **Extension Configuration** web page shows all the extensions number associated with the AltiWare system.

For Tien Lan	ourses Tone Deh				-14	
ack $\bullet \Rightarrow \bullet \bigcirc$	한 G GSearch :	Favorites	iedia 🎯 🗳 🎒	334300691	1	
ess 😢 http://localh	ost/Alti-MSCRMCFG/defau	uit.aspx				<u> </u>
-MSCRM Scree	n Pop Configuration					Powered by Alt
Save Kerresh						
ag Definition Exter	sion configuration DNIS	5/Workgroup config.	ration			
extension Configur	ation					page 2 💌
Extension Num	Extension Name	Screen Pop	Register Status	Pop Page/Match	Pop New Page if no match	Call Log
259	William Zhang	M	InActive	Contact/Caller ID	п	Account 💌
260	Harvey Huang	П	InActive			Account 💌
261	Justin Jia	Π	InActive			Account -
262		<b>V</b>	InActive	Contact/Caller ID	M	Account •
264	Nick Yu	Π	InActive			Account •
:68	derek liu	E	InActive			Account 💌
269	gerry gao	Π	InActive			Account •
272	Jack Fu	Π	InActive			Account -
273	Frank Zhong	Π	InActive			Account 💌
274	eric kong	E	InActive			Account 💌
275		Π	InActive			Account 💌
277	Jeff Ma	m	InActive			Account 💌
· Ready([Account]	[Contact] [Order] [Invoice	e][Case][Contract]	[Product] [Lead] )			

Figure 3. Extension Configuration page

The following fields are shown:

- **Extension Number**—displays all the extension numbers associated with the AltiWare system. Up to 20 extensions are shown, per page.
- **Extension Name**—displays all extension names associated with the extensions in the AltiWare system. If the extension's name is not configured in AltiWare, the field will be blank.
- Screen Pop—when checked, enables a screen pop when a matching record is found. Checking this field further enables an option in the **Pop Page/Match** field.
- **Register Status**—displays whether or not the extension is registered into Alti-MSCRM system.
- **Pop Page/Match**—When the **Screen Pop** field is checked, the **Pop Page/Match** field will display the following options for the screen pop:
  - Contact/Caller ID will match each contact's "Business Phone," "Home Phone," or "Mobile Phone"

- Account/Caller ID will match each contact's "Main Phone" or "Other Phone"
- -Account/Account Number
- Order/Order Number
- --- Invoice/Invoice Number
- Case/Case Number
- Contract/Contract Number
- Product/Product Number
- <u>Call Log</u>—This option allows the administrator to pop a separate screen pop to track an agent's extension activity and history, which can be logged by contacts, accounts, or case numbers.

<u>Use the drop-down list to select one the following log activities for the extension:</u>

- No Log (default setting)
- Contact
- -Account
- Case

When the default setting is changed to one of the three options, the system will log phone activity under the selected option.

• **Pop New Page if no match**—when checked, Alti-MSCRM will pop a blank contact page if no match is detected.

📑 Save 📑		
问 Information	General Details Administration	
	Account Name	Main Phone
	Account Number	Other Phone
	Parent Account	Fax
	Primary Contact	Web Site
	Relationship Type	E-mail
	Address	
	Address Name	ZIP/Postal Code
	Street 1	Country/Region
	Street 2	Phone
	Street 3	Address Type
	City	Shipping Method
	State/Province	Freight Terms
	1	

Figure 4. Blank Contact page

### Incoming Call with Matched Data

When a call comes into the extension and matches the corresponding field, Alti-MSCRM will pop the screen of matching information from the Microsoft CRM database.

For example, if a customer calls **Extension 107** and the caller uses AltiWare's AA/IVR to input an Product ID Number (**9873**, for example), the corresponding Microsoft CRM Product page matching that Product ID Number will be popped on top of the AltiClient screen.

🗿 Product: Front Brakes -	Microsoft Internet E	xplorer		
<u>F</u> ile <u>A</u> ctions <u>H</u> elp				Product: Front Brakes
📑 📮 Save 📑 🎒				
<ul> <li>Convertion</li> <li>Substitutes</li> <li>Price List Items</li> <li>Sales Literature</li> <li>Competitors</li> <li>Notes</li> </ul>	General Descripti ID Name Subject Unit Group Default Unit Costs Default Price List Decimals Supported	on 9673 Front Brakes Clothing and Access Unit pair Single pair Wholesale 0	Product Type Quantity On Hand URL List Price (\$) Standard Cost (\$) Current Cost (\$)	Sales Inventory 💌 767 106.50 78.81 83.54
Status: Active				
E Done				🔠 Local intranet 🥢

Figure 5. Incoming Call with Matched Data Screen Pop

## Incoming Call with Matched Data to be Logged

When the call is finished (either agent or caller hangs up), and IVR data matches a case number (or contact/account number), an activity log will be generated to the case (or contact/account number) and an Alti-MSCRM Call Log window appears.

ti-MSCRM C	all Log			Powered by A
Write Log				×
Call Info				
Call ID	64401060			
Subject	24234,102,64401060,	AltiGen,04/14/2003,1	1:50:30,8002529712,170	
Memo	Hello World!			
Duration	300			
Direction	Outgoing			
	•			
1 Lase(s) to	und	1 1		
Lase	Lustomer	Title	Subject	State Reason
🗹 CAS-010	36 Eric Kong	555	Contact Information	In Progress

Figure 6. Matched Case, Alti-MSCRM Call Log

To save the log to the MSCRM database, click the **Write Log** button. This opens a new window to show the results of the saved log.

Powered by Al 🗶
sful
sful
indow will be closed automatically in 5 seconds!
~

Figure 7. Write Call Log Results window

Otherwise, use the Close button to exit the window.

## Incoming Call with No Matched Data

When the call is finished and no IVR data is available, or the IVR data does not match any case number (or account/contact number), the system will use caller ID to search account or contact number. If there is still no match, the system will no create any log for this call to the MSCRM database and an Alti-MSCRM Call Log window appears.

all Log - Mic	rosoft Internet Explorer	_
i-MSCRM	Call Log	Powered by Alti
		<b>×</b> ⊂
Call Info		
Call ID	64401060	
Subject	24234,102,64401060,AltiGen,04/14/2003,11:50:30,8002529712,170	
Memo	Hello World!	
Duration	300	
Direction	Outgoing	
Cace Not F	aund	
case noch		
	Cannot Find Case , this call activity cannot be logged!	
	This window will be closed au	tomatically in 5 seconds!
one		🔠 Local intranet

Figure 8. No Matched Case, Alti-MSCRM Call Log

# **Operational Notes**

• If Alti-MSCRM is not integrated with the Microsoft CRM server, the Extension Configuration page can still be configured and will still pop to the AltiAgent if the DNIS or Workgroup number matches.

xtension configuration DNIS/Wo	rkgroup configuration		
Extension Configuration			page 1 💌
Extension Num	Extension Name	Register Status	
101	Kitty Wu	InActive	
102	Nick Yu	InActive	
103	Eric Kong	InActive	
104	Paul Ling	InActive	
105		InActive	
106		InActive	
107		InActive	

Figure 9. Extension Configuration page not integrated with Microsoft CRM Server

# DNIS/Workgroup Configuration

In the **DNIS/Workgroup Configuration** web page, you can set up additional screen pop rules based on DNIS digits collected from the incoming call and/or based on the workgroup number accessed by the caller.



Figure 10. DNIS/Workgroup Configuration page

#### Notes:

- Because DNIS/Workgroup configuration settings are saved at Alti-MSCRM Server, the AltiWare system set in the Alti-MSCRM Server configuration will retain those DNIS/Workgroup configuration settings. (For example, Alti-MSCRM Server has the AltiWare set to System A and DNIS/Workgroup configuration settings are configured in Alti-MSCRM Server. If Alti-MSCRM changes AltiWare to System B, System A's DNIS/Workgroup configuration settings are carried over to System B.)
- A screen pop rule based on DNIS/Workgroup configuration will match the rules in order from top to bottom.
- **DNIS/Workgroup Configuration** screen pops have a higher priority than screen pop rules configured in **Extension Configuration**.

• If an AltiWare DNIS entry has a name assigned, when creating the DNIS/Workgroup screen pop for that DNIS, Alti-MSCRM's screen pop rules are *case-sensitive* — you will need to use the *exact* DNIS name instead of DNIS number.

For example, if you have DNIS number "2526607" assigned as "ABC" in AltiWare, and a DNIS/Workgroup screen pop in Alti-MSCRM is created using "abc," the screen pop for "2526607" will not pop unless the name in Alti-MSCRM is changed to "ABC."

#### To setup up a screen pop rule:

1. Click the **Create** button to invoke a blank screen pop rule.

💣 top - Microsoft Internet E	xplorer	
Create DNIS/Workgrou	p configuration	
Save and Close		
DNIS number Workgroup number		
Pop Page/Match	Contact Page/Caller ID	-
Pop New Page if no match		

Figure 11. Blank Screen Pop Rule

- 2. Enter the **DNIS number** and/or **Workgroup Number** that the screen pop rule will use to pop the contact screen.
- 3. <u>Select the Screen Pop field to enable a screen pop when a matching</u> record is found. Checking this field further enables an option in the **Pop Page/Match** field.
- 4. In the **Pop Page/Match** drop down list, select one of the following:
  - Contact/Caller ID
  - Account/Caller ID
  - Account/Account Number
  - Order/Order Number
  - Invoice/Invoice Number
  - Case/Case Number
  - Contract/Contract Number

- Product/Product Number
- 5. (Optional) In the field below the Pop Page/Match drop-down list, you can enter a pre-defined web page that will pop for the agent.



Figure 12. Pre-definable Web Page Field

A suggested use for this feature is to prepare an agent answering guide or agent script as a web page, configured to pop to a workgroup to guide the workgroup agents with key information—product information, current inventory levels, sales script, etc.—while handling a customer call.

**Note:** For an example of how to set up an answering guide, refer to "Sample Answer Guider" on page 31.

6. (Optional) Select the **Pop New Page if no match** to have a blank contact screen pop up if no conditions are matched.

🚈 Account: New - Microso	ft Internet Explorer		
<u>E</u> ile <u>H</u> elp			Account: New
📑 Save 🔛			
Information	General Details Administration Account Name Account Number Parent Account Primary Contact	Main Phone Other Phone Fax Web Site	
	Relationship Type 💽	E-mail	
	Address Name Street 1	ZIP/Postal Code Country/Region	
	Street 2	Phone	
	City	Address Type Shipping Method	×
	State/Province	regul terms	¥
Status: New			
E Done			Eccal intranet

- Figure 13. Blank Contact Page
  - 7. Click the **Save and Close** button when finished.

## Incoming Call with Matched Data

When a call comes into the AltiAgent and matches a corresponding **DNIS** and/or **Workgroup Number** entry, Alti-MSCRM will pop the screen of matching information from the Microsoft CRM database.

For example, if a customer calls **Workgroup Number 302** with DNIS digits **2521302**, and the caller uses AltiWare's AA/IVR to input an Order Number (**01003**, for example), the corresponding customer's Order Number will be popped on top of the AltiClient screen.

🏄 Order: Road Bike orde	r - Microsoft Internet E	plorer			<u>- 0 ×</u>
<u>F</u> ile <u>A</u> ctions <u>H</u> elp				Order: Road Bik	
📘 🔛 Save 📑 🍏	Recalculate Look Up	Address 🔀 Create Invoic	e		
🔯 Information	General Shipping	Addresses Administration			
Products	Order ID	01003			
	Name	Road Bike order			
Uther Contacts	Customer	诊 World of Bikes 🛛 🔎	Price List	📙 <u>Wholesale</u>	
Activities	Totals				
Notes	Detail Amount (\$)	97,223.28			
	Order Discount (%)				
	Order Discount (\$)	1,527.90			
	Pre-Freight Amount (\$)	95,695.38			
	Freight Amount (\$)	7,384.84			
	Total Tax (\$)	7,545.17			
	Total Amount (\$)	110,625.39			
Status: Active					
Done				Cocal intranet	

Figure 14. Order Page

# **Operational Notes:**

- Alti-MSCRM does the data synchronization based on the configuration time interval. If a matched Microsoft CRM record is changed or removed within this duration, an error message will pop up.
- When running Alti-MSCRM, the maximum number of windows that can be opened (including Microsoft CRM entries) is 32 screens. Once this limit is reached, Alti-MSCRM will display warning message window and no new screen pops will appear until another window or entry screen is closed.

- If hardware performance becomes an issue (Microsoft CRM entry screens pop up too slow), it is recommended that you keep only up to eight (8) screens open on your desktop at all times.
- If Alti-MSCRM is not integrated with the Microsoft CRM server, the web page pop on the **DNIS/Workgroup Configuration** page can still be configured and will still pop to the AltiAgent if the DNIS or Workgroup number matches.

Sa	ave Refresh	Fg		· · · · · · · · · · · · · · · · · · ·
Exte	nsion configuration	DNIS/Workgroup configuration		
DN	IIS/Workgroup conf	guration		Create Delete Select A
	DNIS number	Workgroup number	Script Screen Pop	Script URL
Г		100	<b>V</b>	http://answerguider/wg100/default.aspx
			-	the second se

Figure 15. DNIS/Workgroup Configuration page not integrated with Microsoft CRM Server

• When adding data into a new or existing Microsoft CRM entry record, if another call comes in to the Alti-MSCRM agent, the currently open Microsoft CRM entry record will prevent any new screen pop entry records from popping up and a **Server Busy** message is displayed.



Figure 16. Server Busy Dialog Box

At the same time, a **Microsoft Internet Explorer** dialog box will prompt you to save your changes to the Microsoft CRM entry record or to close the record without saving the changes.

Microsoft	Internet Explorer					
⚠	Are you sure you want to navigate away from this page?					
	To save your changes, slick Cancel, and then slick Save or Save and Close					
	To save your changes, click cancer, and cherraick save or save and close.					
	To close this record without saving your changes, click OK.					
	Press OK to continue, or Cancel to stay on the current page.					
	OK Cancel					

Figure 17. Navigate Away Dialog Box

Pressing **OK** will allow the next screen pop to appear in place of the old Microsoft CRM entry. Pressing **Cancel** will leave the current Microsoft CRM entry record open.

# Sample Scenario

After Alti-MSCRM is configured, in an AltiWare environment, Alti-MSCRM should function as follows:

1. AltiWare's Auto Attendant/IVR is configured to collect digits based on Account ID, Case ID, etc.

IVR2 CRMAA			×
1 - expand tree (CRMAA)         2 - get digits (accountid 3-4)         2 - get digits (accountid 5-5) (AccountNumber)         3 - get digits (orderid 5-5) (OrderNumber)         3 - get digits (contractid 5-5) (InvoiceNumber)         9 - 4 - get digits (contractid 5-5) (ContractNumber)         9 - 5 - get digits (contractid 5-5) (ContractNumber)         9 - 7 - get digits (productid 2-4) (ProductNumber)         9 - 8 - get digits (productid 5-5)         9 - 9 - get digits (accountid 5-5) (HuntGroup)         0 - to operator         * - repeat level         # - mail box access         T - to operator	Item Name Prompt Posh URL Actions Extension 302	Image: Constraint of the second se	
		Lancel Apply Help	

Figure 18. Auto Attendant/IVR Configuration page

2. In the DNIS/Workgroup Configuration web page of Alti-MSCRM, a rule is created and configured to pop a screen pop when an AltiAgent receives an external call going to **Workgroup Number 302**.

Create DNIS/Workgroup Save and Close	p configuration	
2 Done	Eccal intranet	

Figure 19. Screen Pop Rule

After the rule is configured, the rule appears in the DNIS/Workgroup Configuration web page.

ag Def DNIS,	finition Extension configuration	ration DNIS/Workgroup configura	tion		💽 Create	Delete	Select All
	DNIS number	Workgroup number	Pop Page/Match		Pop New Page if no ma	atch	
	2521302	302	Account/Caller ID	Ŧ	<b>V</b>		
	2521303	303	Order/Order Number	4	V		
	2521304	304	Invoice/Invoice Number	•	<b>v</b>		
	2521305	305	Case/Case Number	٠	V		
	2521306	306	Contract/Contract Number	•	<b>v</b>		
	2521307	307	Product/Product Number	•	•		
		302	Contact/Caller ID	•	~		
	12345	test	Contact/Caller ID	-	<b>v</b>		

Figure 20. DNIS/Workgroup Configuration page

3. AltiAgent receives an external call from **5102522222**.

302						OUTBOUND
Calls in que	ue	0	Agents Log	jin 🛛	5	
In Queue Ex	ceed Threshold	0	Agents Bus	sy	4	
Longest Qu	eue Time	00:00:00	Agents in V	Vrapup	0	
Service Lev	/el	100	Agents Ava	ailable	1	
DIUDD: Ringing Status	Name	Number	Group	DNIS	Length	07:19:1
Cinging Status	Name	Number 5105552222	Group 302	DNIS 255	Length	07:19:1
City City City City City City City City	Name	Number 5105552222	Group 302	DNIS 255	Length 00:00:00	07:19:1
DIUDD: Ringing Status Ringing	Name	Number 5105552222	Group 302	DNIS 255	Length 00:00:00	07:19:1
CTUCC: Ringing Status ≪ Ringing	Name	Number 5105552222	Group 302	DNIS 255	Length 00:00:00	07:19:1
OIUDD: Ringing Status ≪ Ringing	Name	Number 5105552222	Group 302	DNIS 255	Length 00:00:00 Calls	07:19:1

- Figure 21. Alti-Agent Main Window
  - 4. Alti-MSCRM will display the screen pop for the Microsoft CRM entry with the matching information.

Account: Lots of Bikes	Storehouse - Microsof	Internet Explorer		
<u>File A</u> ctions e <u>R</u> esou				_ots of Bikes Storehouse
📘 Save 📑 🎒	🖃 Send E-mail			
隚 Information	General Details 4	dministration		
📄 More Addresses	Account Name	Lots of Bikes Storehouse	Main Phone	5105552222
Salec	Account Number	LOT31AB8	Other Phone	
Sa Suits	Parent Account	2	Fax	5102526360
🗑 Cases	Primary Contact	<u>Brewer, Alan</u>	Web Site	
🦻 Activities	Relationship Type	Prospect 🗸	E-mail	someone@microsoft.com
🙀 Sub-Accounts	Address			
🧕 Contacts	Address Name		ZIP/Postal Code	62964
Notes	Street 1	123 N. America Ave	Country/Region	US
	Street 2		Phone	555-0135
Contracts	Street 3		Address Type	×
	City	Campbellsville	Shipping Method	×
	State/Province	KY	Freight Terms	▼
	1			
Status: Active				
Cone Done				💙 Internet 🥼

I.

Figure 22. Microsoft CRM Matched Entry Screen Pop

# Sample Answer Guider

The answer guider feature in Alti-MSCRM allows for a web page to be popped that is intended as an agent answering guide or agent script. The answer guider can be configured to pop to a workgroup agent to provide key information—product information, current inventory levels, sales script, etc.—while handling a customer call.

The answer guider feature can be configured as followed:

- 1. Create an agent script or an answering guide with your desired information on a web page.
- 2. In the **DNIS/Workgroup** configuration page, enter the URL for this web page in the **Pop Page/Match** entry field and select the checkbox..



Figure 23. URL for answer guide

3. Use the **Virtual Directory Creation Wizard** in IIS to create a virtual directory for the answering script.

ial Directory Creation Wizard		
tual Directory Alias You must give the virtual directory a shor	name, or alias, for quick reference.	4
Type the alias you want to use to gain ac same naming conventions that you would	cess to this Web virtual directory. Us I for naming a directory.	e the
Alias: AnswerGuider	_	

Figure 24. Virtual Directory Creation Wizard - Virtual Directory Alias

4. Select a real directory to match the virtual directory.



Figure 25. Virtual Directory Creation Wizard - Web Site Content Directory

5. Make sure there is a screen pop file in the real directory.

J:\AnswerScipt		
Ele Edit Yiew Favorites	Iools Help	
⇐ Back ▾ ⇒ ▾ 🔂 🔞 Se	arch 💁 Folders 🧭 😤 🥵	X ω 🔲 ·
Address 🗋 J:\AnswerScipt		<b>_</b> ∂‱
Folders	× Name 🛆	Size Type Modi
Setup     S	▲ E WG100.htm	0 KB HTML Document 2003

Figure 26. Confirm screen pop file exists

6. Once configured, when a call comes into Workgroup 100, before an agent answers the call, WG100.htm will pop up on the agent's screen.

# Microsoft Business Solutions Customer Relationship Management

After you have Alti-MSCRM Server integration, Alti-MSCRM Client and AltiClient running and Alti-MSCRM screen pops configured, Alti-MSCRM will pop screen pops based on database information in the Microsoft CRM program.



Figure 1. Microsoft Business Solutions CRM program

For detailed information on this product, refer to the Microsoft CRM documentation.

#### Important Notes

• Inputting the Server *name* for Microsoft CRM uses intranet settings, while inputting the Server *IP address* uses Internet settings. When using the IP address, a login window will pop and prompt you for a password. If you do not want to be prompted with a password when entering the IP address, you must change your Internet settings: go to

Start>Settings>Internet Options, select the Security tab, select Custom Level. Scroll to the very last option — User Authentication — and change the logon to Automatic logon with current username and password.

- Be sure not to exceed your company's license limit for Microsoft CRM. Contact your system administrator if additional Microsoft CRM licenses are needed. Refer to the Microsoft CRM documentation for more detail.
- <u>A Search & Dial</u> feature is available as a menu item and button on the Microsoft CRM program.

Jser: Kong, Eric	<u>Eile N</u> ew <u>G</u> oTo <u>T</u> oo	ls <mark>Search &amp; Dial <u>H</u>elp</mark>				Home: My Home P
O' Home	Alti-MSCRM Search 8	Dial				Powered by Alt
Settings	Phone Number 101			<b>Q</b>		
O Search & Dial	Search a			2		
	<b>_</b>					
Screen Pop	Contact	Account Lead				
	Found	100 record(s)				Next>>
	Account Name		Main	Other	Address	
	Account Number 0		101			
	Account Number 1					
	Account Number 1					
	Account Number 10					
	Account Number 100					
	Account Number 1000					
	Account Number 1001					
	Account Number 1002					
	Account Number 1003					
	Account Number 1004					
	Account Number 1005					
	Account Number 1006					
doub contr	Account Number 1007					
R Quick treate	Account Number 1008					
Go Go	Account Number 1009					
	Status: Ready					
My Home	Page 🚳 🕅	vorkplace	Sales Automation	Service Customer S		Matrice Statistics

Figure 2. Search & Dial Button

When the user clicks on the **Search & Dial** button, or when **Search & Dial** is selected from the menu list, this pops an Alti-MSCRM Search & <u>& Dial page.</u>

				0		
none Number 101				62		
earch <mark>a</mark>			2			
Contact	Account	Lead				
Found	100 reco	rd(s)			Next>>	
Account Name		Main	Other	Address		
Account Number 0		101				
Account Number 1						
Account Number 1						
Account Number 10						
Account Number 100						
Account Number 1000						
Account Number 1001						
Account Number 1002						
Account Number 1003						
Account Number 1004						
Account Number 1005						
Account Number 1006						
Account Number 1007						
Account Number 1008						
Account Number 1009						

Figure 3. Search & Dial Popup Window

A user can search by **Contact**. Account or **Lead** from this web page. When an entry is opened, the user can use the **Dial** button to call the phone number(s) associated with the entry.



Figure 4. Dial button from Contact Page

After clicking on the **Dial** button, a new window pops up displaying all available numbers for the contact—**Business Phone. Home Phone. Mobile Phone** and **Pager.** 

Contact : Jimn	ny Bischoff
	Click-and-Dial
Business Phone	555-0135
Home Phone	555-0136
Mobile Phone	555-0137
Pager	555-0139
Address Name	: ABX Company
Phone	510-2529756

Figure 5. Dial Window

To dial a number, click the number in the field of the desired entry.

# Index

# A

Account ID 14 address AltiGen Communications, Inc. ii AltiGen Communications phone numbers ii AltiGen Communications, Inc. address ii Alti-MSCRM Client configuration 9 installation 9 Alti-MSCRM installation 5 Alti-MSCRM Server configuration 5 installation 5 answer guider 31

# С

Case ID 14 Contract ID 15

## D

DNIS/Workgroup Configuration 22

### Ε

Extension Configuration 16

## I

installation 5 Invoice ID 14

### Μ

Microsoft Business Solutions Customer Relationship Management 33

### 0

Order ID 14

### Ρ

Phone Num 15 Product ID 15

# S

sample answer guider 31 Screen Pop Configuration 13

## Т

```
tag definitions 13
Account ID 14
Case ID 14
Contract ID 15
Invoice ID 14
Order ID 14
Phone Num 15
Product ID 15
```

### U

upgrade path 3