AltiGen COMMUNICATIONS

Alti-MSCRM™ 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

Introduction

About Alti-MSCRM

Alti-MSCRM is a Microsoft® .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
- Search and dial buttons
- 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
- AltiContact Manager 4.6 SP1, 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.

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**.
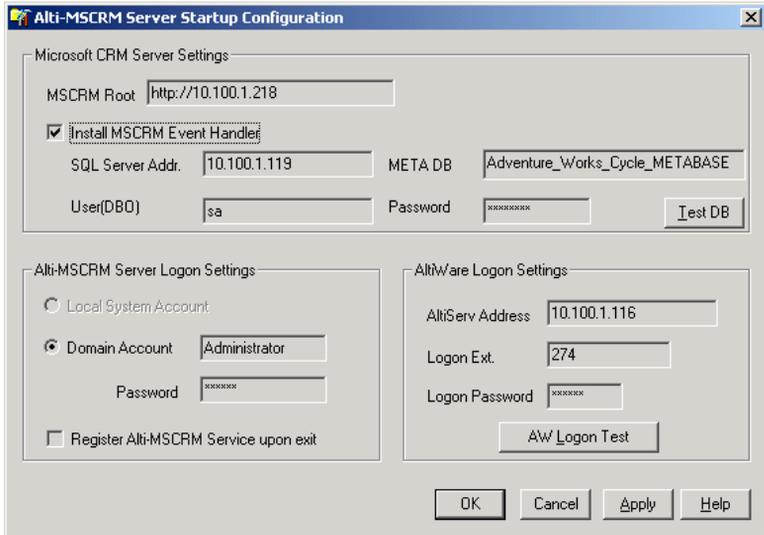
Figure 1.   Alti-MSCRM Server Startup Configuration window

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.
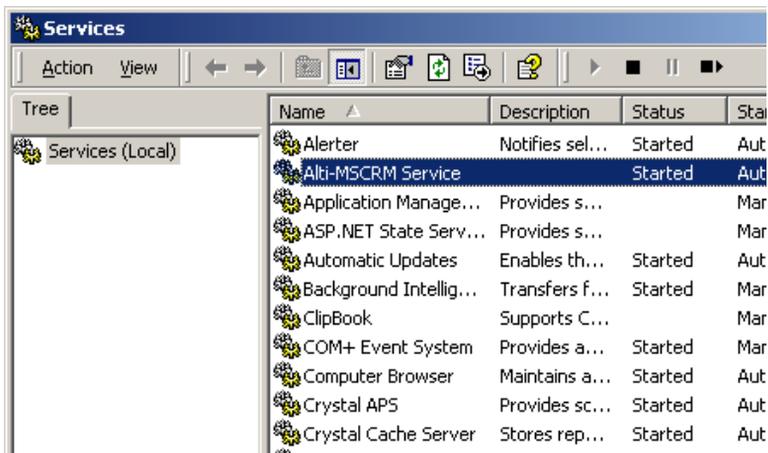
Figure 2.   Alti-MSCRM Service, Services window

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.

2. 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.

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.

5. 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.
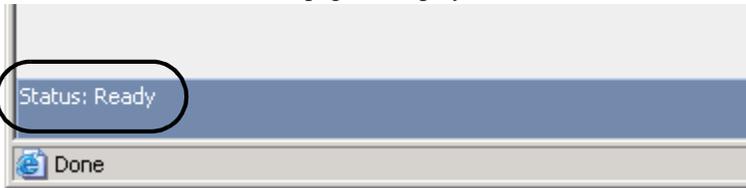
Figure 1.   Alti-MSCRM Status Field

Tag Definitions

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.
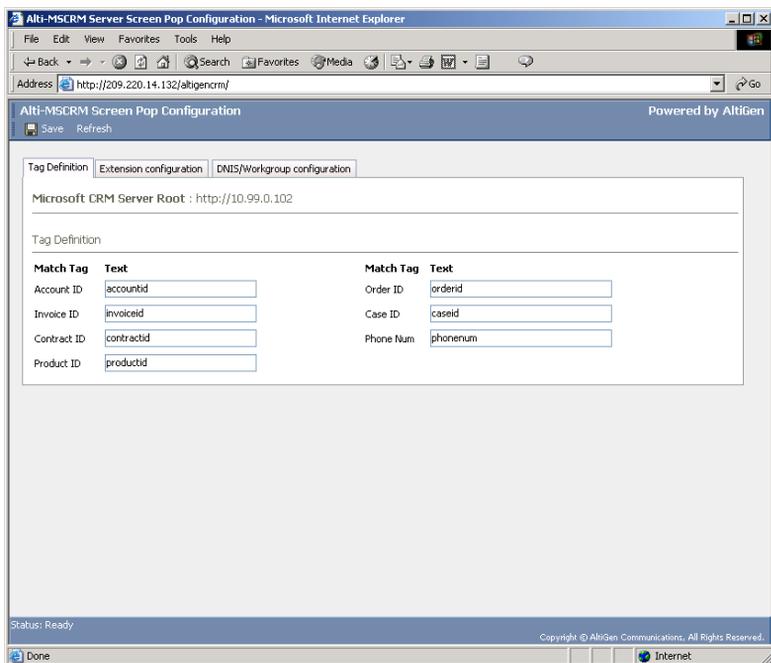
Figure 2. Tag Definition page

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.
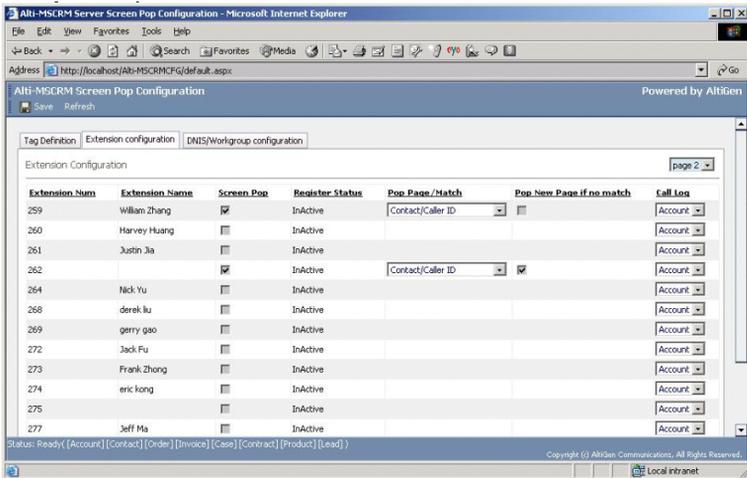
Figure 3.   Extension Configuration page

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**

- **Call Log—**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.

  Use the drop-down list to select one the following log activities for the extension:

  - — **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.

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.
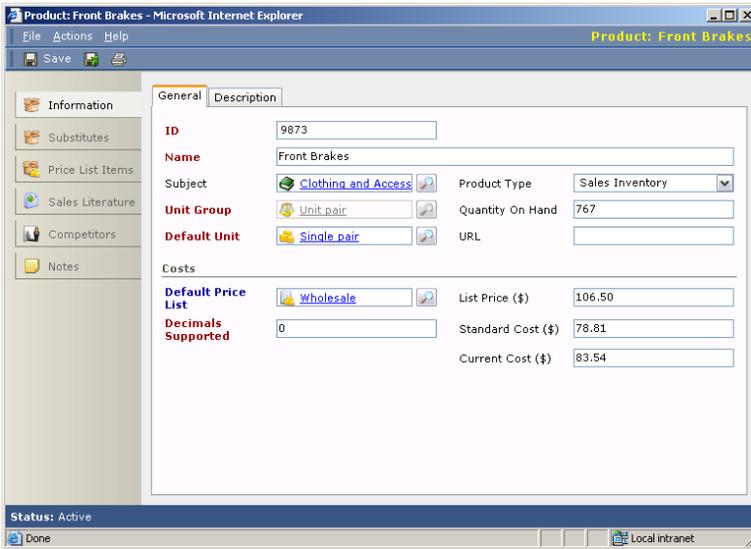
Figure 5.   Incoming Call with Matched Data Screen Pop

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.
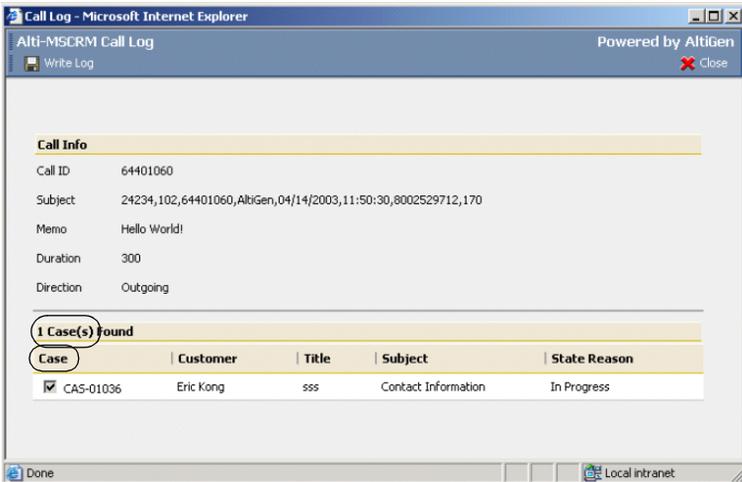
Figure 6.   Matched Case, Alti-MSCRM Call Log

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.
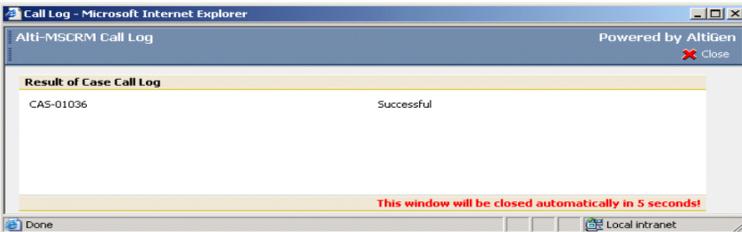
Figure 7.   Write Call Log Results window

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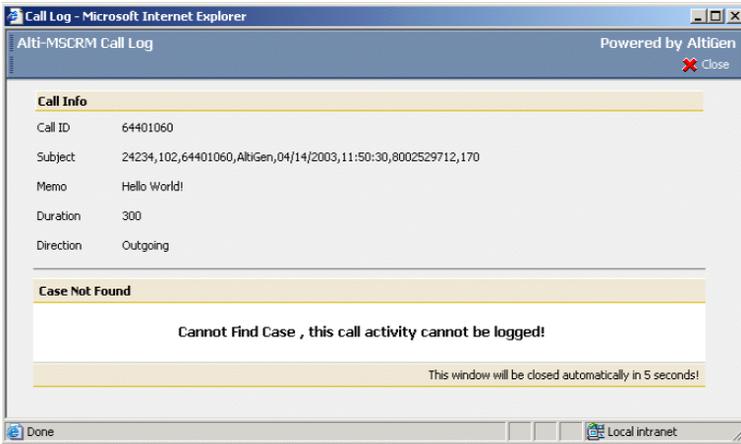
Figure 8. No Matched Case, Alti-MSCRM Call Log

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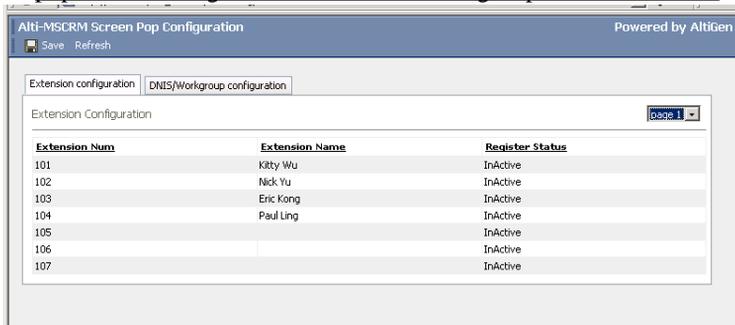
Figure 9. Extension Configuration page not integrated with Microsoft CRM Server

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.
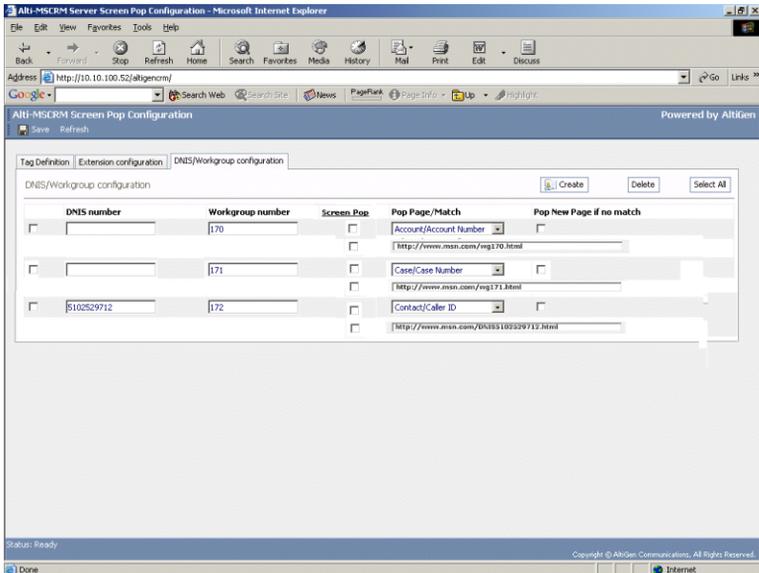
Figure 10.   DNIS/Workgroup Configuration page

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.
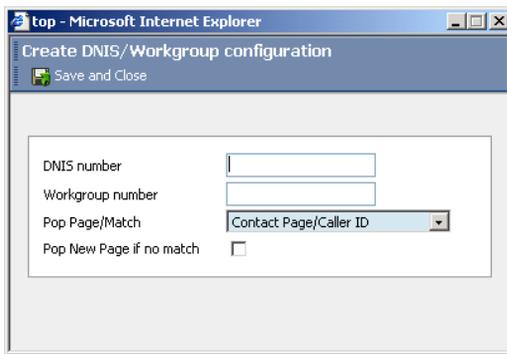
Figure 11.   Blank Screen Pop Rule

2. Enter the **DNIS number** and/or **Workgroup Number** that the screen pop rule will use to pop the contact screen.

3. Select the **Screen Pop** field to enable a screen pop when a matching 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.
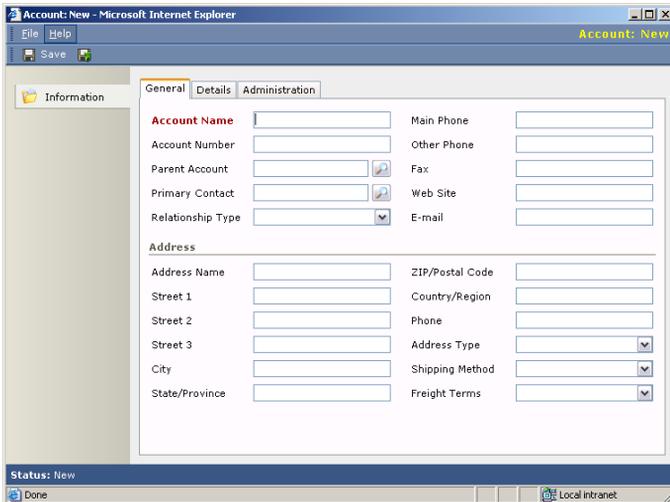
Figure 13.   Blank Contact Page

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.

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.

- <u>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.</u>

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.
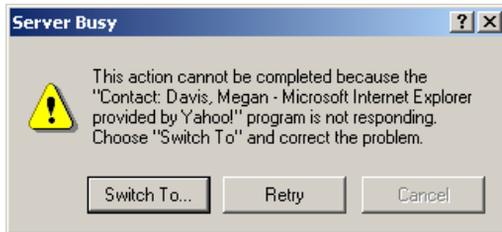
Figure 16. Server Busy Dialog Box

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.
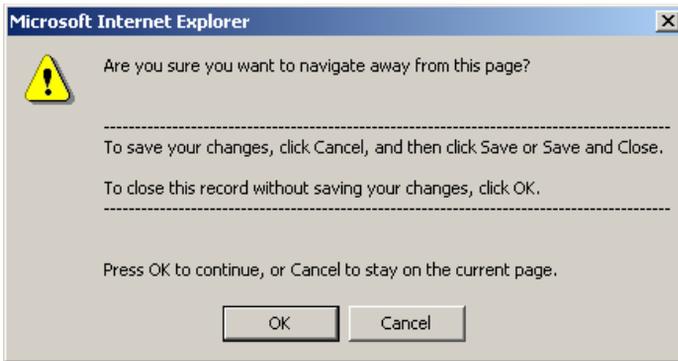
Figure 17.   Navigate Away Dialog Box

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.
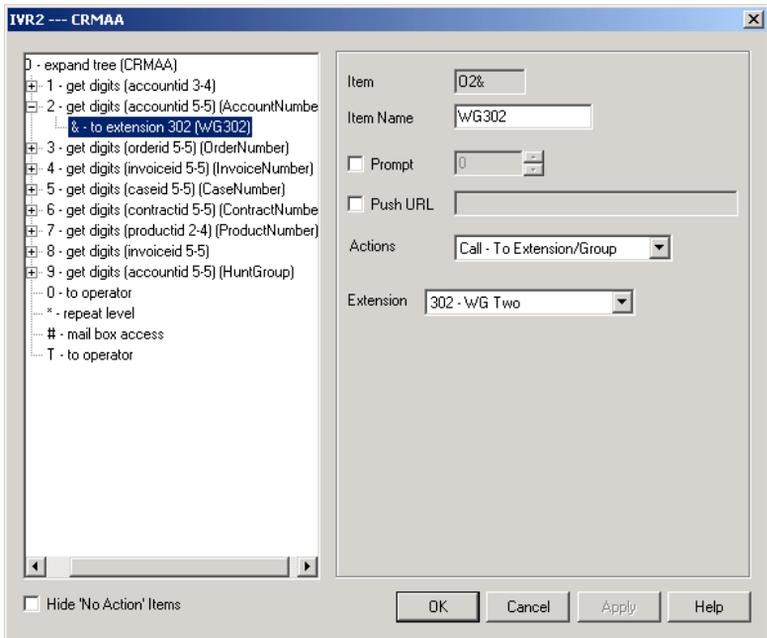
Figure 18.   Auto Attendant/IVR Configuration page

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**.
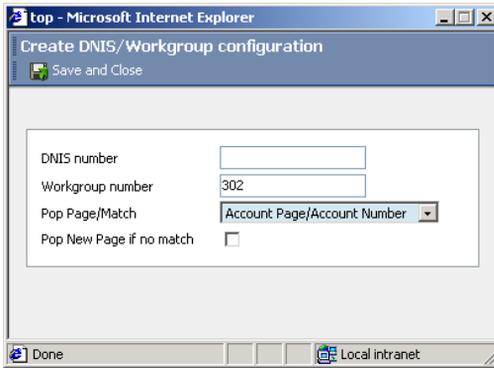
Figure 19.   Screen Pop Rule

After the rule is configured, the rule appears in the DNIS/Workgroup Configuration web page.
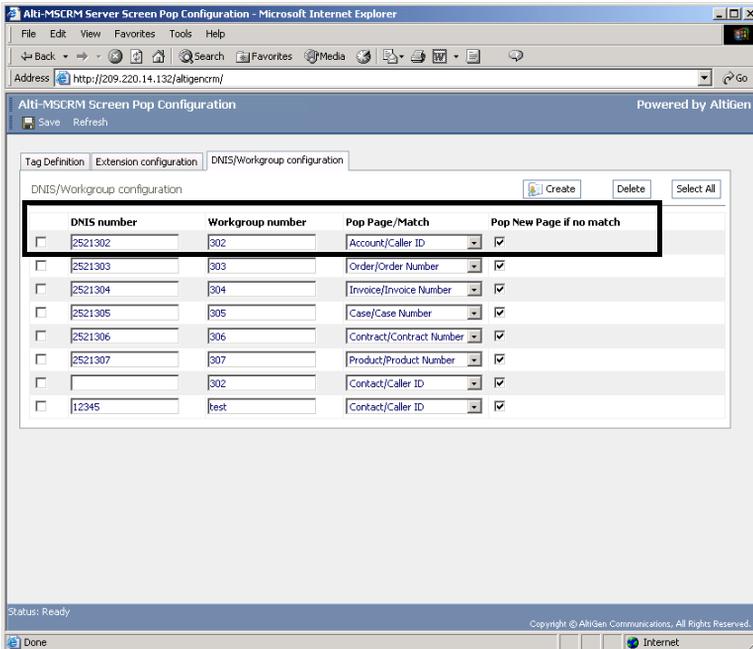
Figure 20.   DNIS/Workgroup Configuration page

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

Figure 21.   Alti-Agent Main Window

4. Alti-MSCRM will display the screen pop for the Microsoft CRM entry with the matching information.
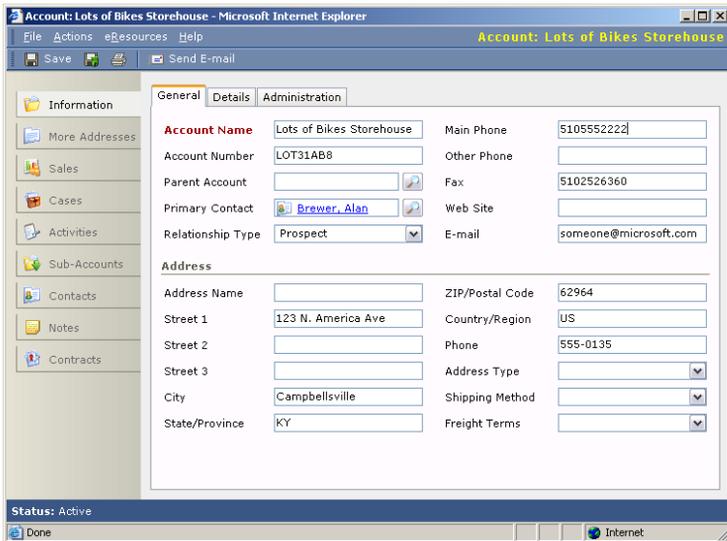
Figure 22.   Microsoft CRM Matched Entry Screen Pop

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..
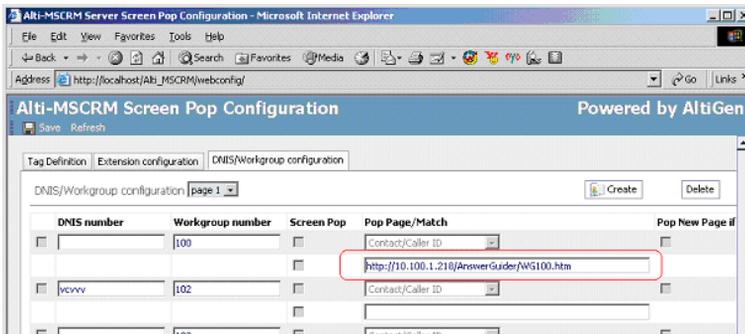
Figure 23. URL for answer guide

3. Use the **Virtual Directory Creation Wizard** in IIS to create a virtual directory for the answering script.
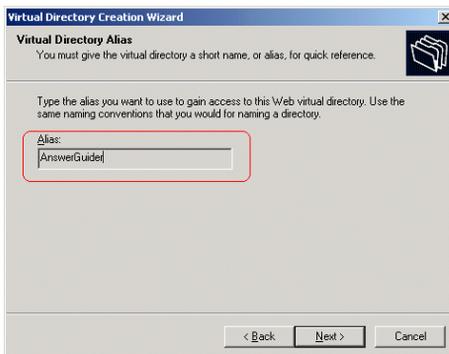
Figure 24. Virtual Directory Creation Wizard - Virtual Directory Alias

4.   Select a real directory to match the virtual directory.
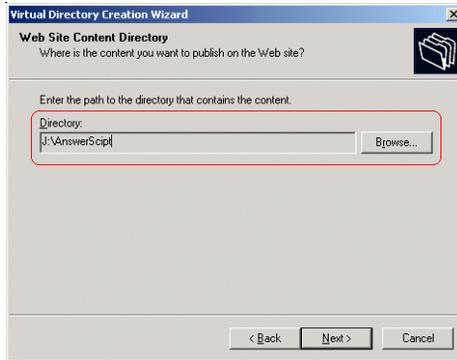
Figure 25.   Virtual Directory Creation Wizard - Web Site Content Directory

5.   Make sure there is a screen pop file in the real directory.
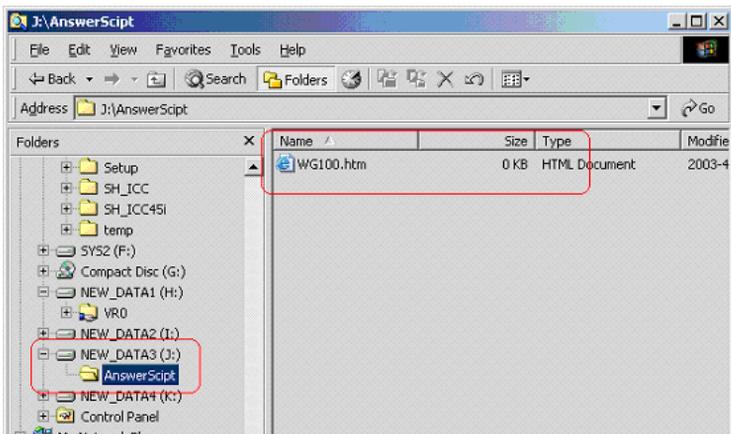
Figure 26.   Confirm screen pop file exists

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.
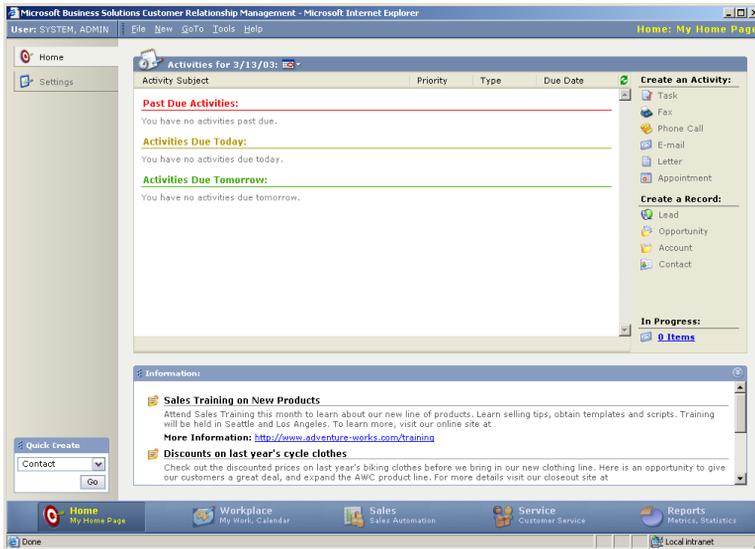
Figure 1.   Microsoft Business Solutions CRM program

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.

- A <u>**Search & Dial**</u> <u>feature is available as a menu item and button on the Microsoft CRM program</u>.
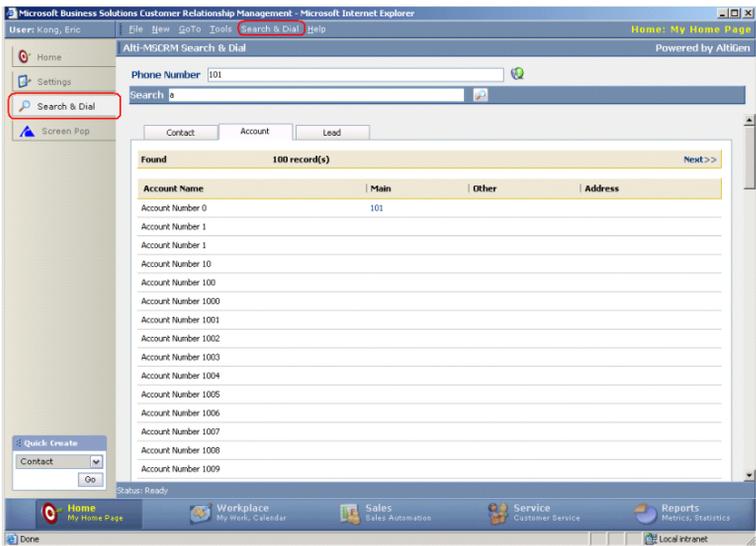
Figure 2.   Search & Dial Button

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 & Dial page.
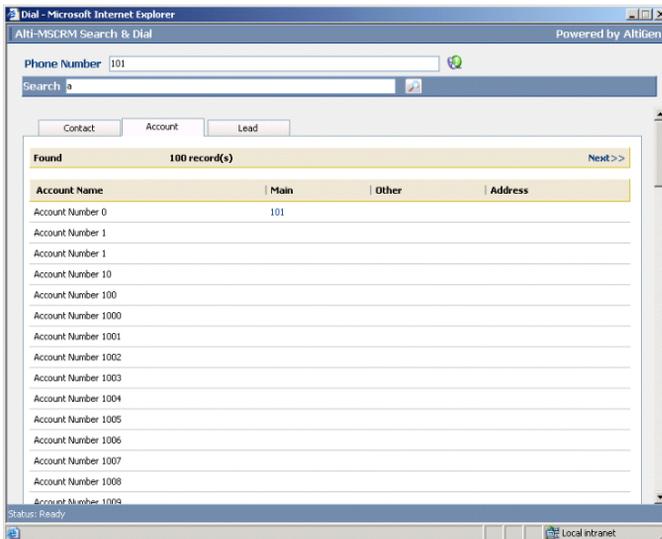
Figure 3.   Search & Dial Popup Window

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**.

Figure 5.   Dial Window

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

Index