

Phone Manager Application Support

JANUARY 2015

DOCUMENT RELEASE 4.2

APPLICATION SUPPORT



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SugarCRM

Overview

This describes the features that are available when integrating with NetSuite CRM+ hosted in the Cloud.

Supported Versions

The integration uses NetSuite v2014.1 web services. Although NetSuite tries to maintain backwards compatibility when they upgrade their cloud platform this is never guaranteed. This version of the plugin has been tested on the latest version that was available upon release.

Features

Integration with NetSuite CRM+ supports the features listed below:

- [Click to dial](#)
- [Screen pop for customer and contacts records](#)
- [Automatic call history entry](#)

Click to dial

When a record is displayed any telephone numbers will be shown as hyperlinks and clicking the link will call the number selected.

The screenshot shows the NetSuite CRM interface. At the top, there is a navigation bar with icons for home, star, and a search box. Below the navigation bar, the contact record for Carl Pedrosa is displayed. The record includes a 'Primary Information' section with a 'CONTACT' tab and a 'COMMENTS' tab. Under the 'CONTACT' tab, there is a section for 'Email | Phone | Address'. The 'PHONE' section is expanded, showing a 'MAIN PHONE' field with the number '(777) 444-1111' highlighted by a red box, and a 'HOME PHONE' field.

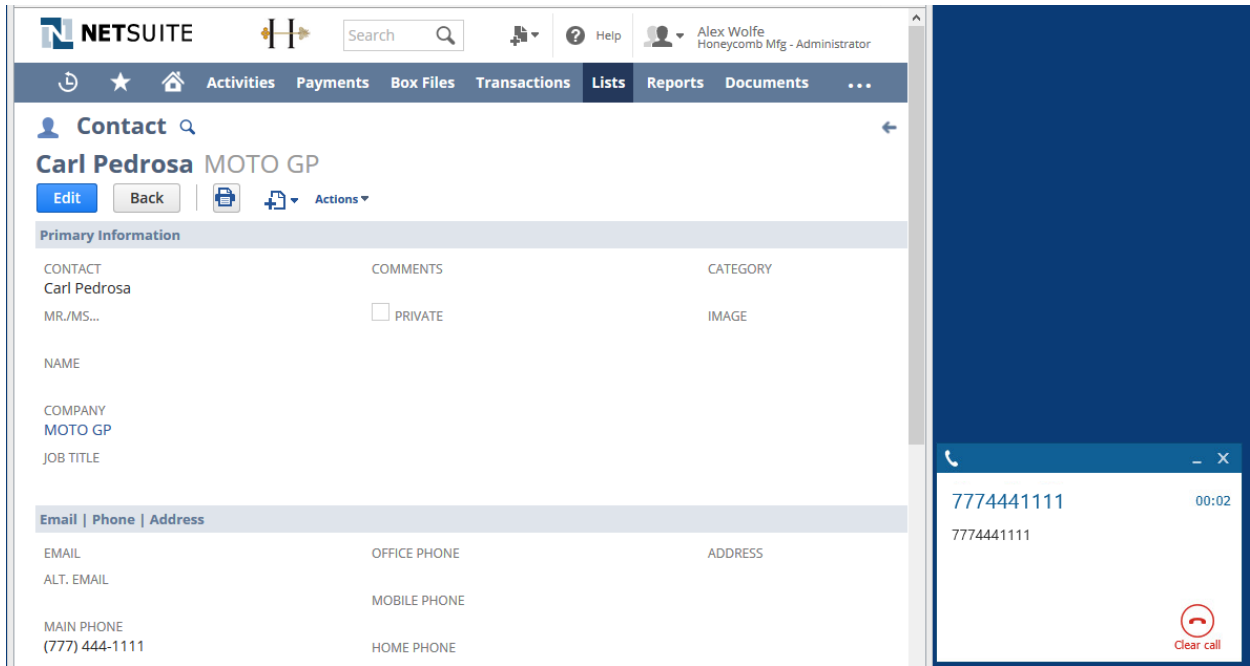
See the [Click to dial configuration section](#) for details.

This requires Phone Manager to be running in the same Windows session as NetSuite.

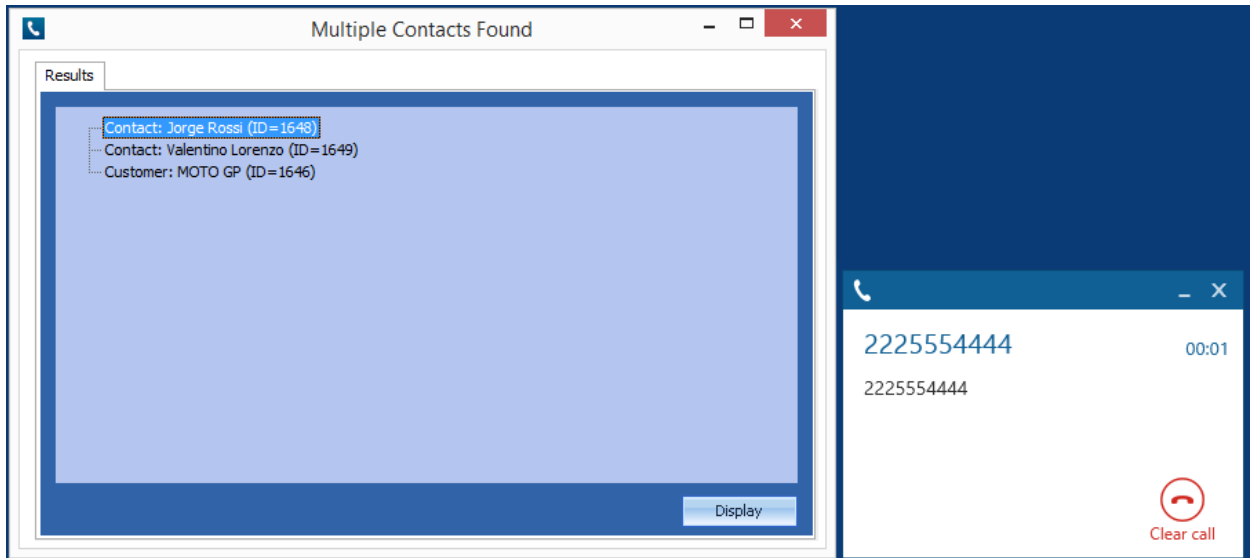
If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

Screen pop


CRM *Contact* and/or *Customer* records can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching records that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* record was found and the record was automatically displayed using the Users default browser.



If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 2225554444 and this has found 2 matching *Contact* records and 1 matching *Customer* record that have this telephone number.

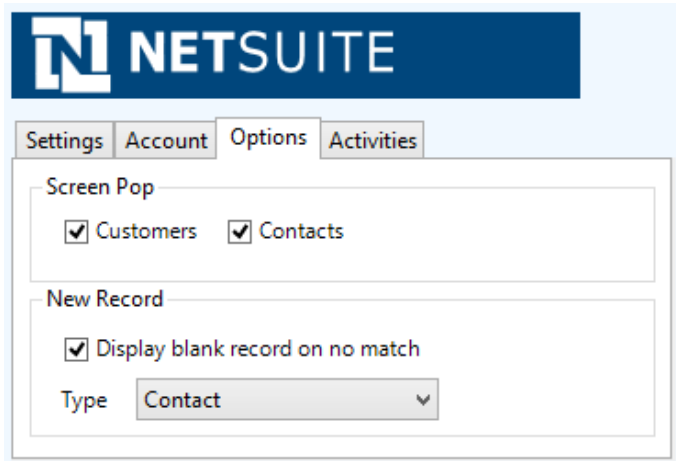


The correct record can then be highlighted and then clicking on the *Display* button or double clicking the entry will open this record.

 The plugin will only search for records that are in the *Active* state. If any records have been marked as *In Active* then they will not be displayed.

Record and matching options

Configuration options are available on the plugin that allow the type of *Records* to be used in the searching to be set. For example it can be configured so that only the *Contact* records are searched. These options are set on the *Options* tab.



If no match is found when searching than a blank form can be automatically displayed to create a new record. The record type, *Contact* or *Customer* that is created can be set here.

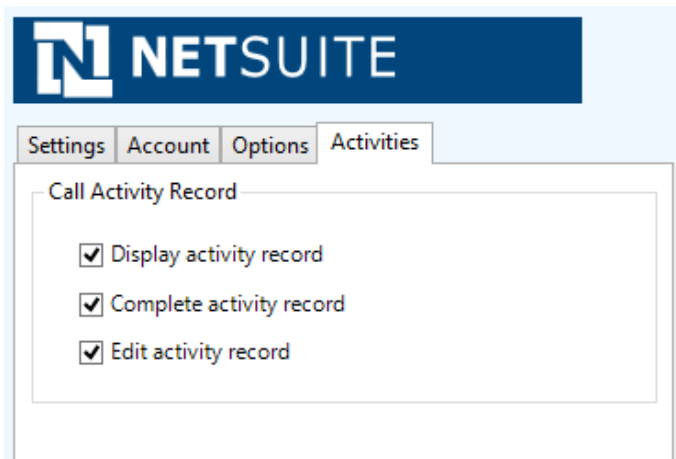
Automatic call history entry

The plugin supports the ability to be able to automatically create and display a NetSuite Phone Call Activity entity. The record to associate this with is found using the caller id received or the number dialed, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the [screen popping](#).

The Activity record is automatically created with the information relating to the call entered into the relevant fields.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialed number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received on.
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they are known until the call is cleared.
Call Recording	If integrating with a call recorder then this can contain a URL link to the call recording (this not a clickable hyperlink but can be copied and pasted into a browser). The call event trigger must have been set to at least Call Answered as the call recorder will only create the record when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.



Display activity record: This will display the *Activity* form, if this is not set then the record will be created without the user seeing the form.

Complete activity record: This will set the status of the *Activity* to be Completed.

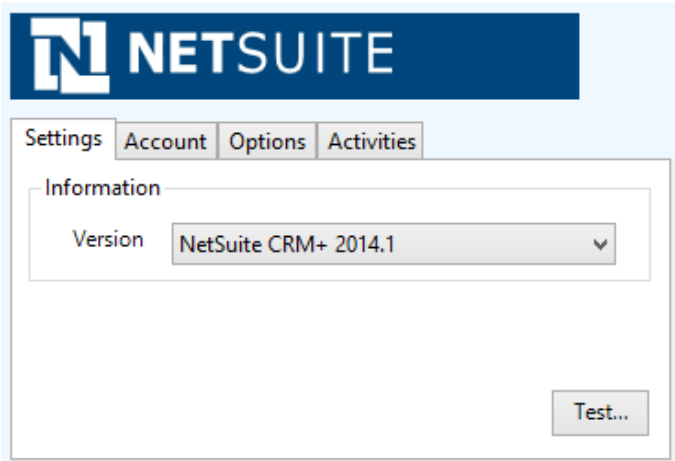
Edit activity record: This will open the *Activity* record in edit mode.

Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Dynamics CRM.

Settings and versions

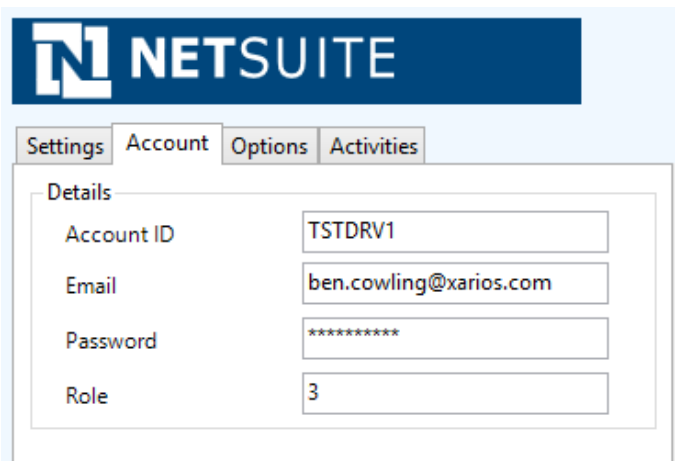
The supported version of NetSuite can be seen on the *Settings* tab.



The screenshot shows the NetSuite interface with the 'Settings' tab selected. Under the 'Information' section, the 'Version' dropdown menu is set to 'NetSuite CRM+ 2014.1'. A 'Test...' button is located at the bottom right of the form.

Account details

The specific account details need to be set on the *Account* tab.



The screenshot shows the NetSuite interface with the 'Account' tab selected. Under the 'Details' section, the following fields are visible: 'Account ID' with the value 'TSTDRV1', 'Email' with the value 'ben.cowling@xarios.com', 'Password' with a masked value '*****', and 'Role' with the value '3'.

Account ID: This is the NetSuite CRM Account ID. This can be found from the within NetSuite. From the Setup menu select Integration -> Manage Integration -> Web Services Preferences .

Web Services Preferences

Save Cancel Reset

ACCOUNT ID
TSTDRV1

Email: The email account used to login to NetSuite for this user.

Password: The password used to access NetSuite for this user.

Role: The role to use to connect to NetSuite for this user. This needs to be to the Internal ID of the specific role. To find the relevant ID, set the Show Internal IDs preference and the internal ID can be found by going to Setup > Users/Roles > Manage Roles.

Authentication and profile details

The Profile tab enables the security credentials used to access Microsoft Dynamics CRM to be configured.

Use Integrated Windows Authentication: If this is set then the username, password and domain details from user who is logged on the computer will be used.

 Using Integrated Windows Authentication is NOT supported when using IFD and claims based authentication.

Depending on the configuration of Microsoft Dynamics CRM and how it is accessed will determine what options are required.

NetSuite Configuration

Web services

The integration uses the NetSuite CRM Web Services for the screen pop and phone call activity features. The Web Services are enabled from within NetSuite and can only be performed by a NetSuite Administrator.

Select *Setup -> Company -> Enable Features*. In the *SuiteCloud* tab, scroll down to the *SuiteTalk (Web Services)* section and enable the *Web Services* check box.

Each User that is connecting to NetSuite needs to have the Web Services permission set against their role. To assign the Web Services permission to a role:

1. Select *Setup -> Users/Roles -> Manage Roles*.
2. Click either *Edit* or *Customize* next to the role.
3. From the *Permissions* tab select *Setup*.
4. Add the *Web Services* permission with the *Full* level.

Click to dial

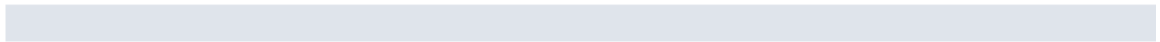
To enable the click to dial feature from the telephony integration option needs to be enabled.

1. Select *Setup -> Company -> Enable Features*.
2. In the *SuiteCloud* tab, scroll down to the *Integration (Add-ons)* section
3. Enable the *Telephony Integration* check box.
4. For each user, select *Settings -> Set Preferences*.
5. Select the *Telephony* tab.
6. Set the *Telephony Option* to be **CTI**.
7. Enter "tel://{phone}" into the *CTI URL* section.



Set Preferences

[Save](#) [Cancel](#) [Reset](#)



TELEPHONY OPTION

TAPI DEVICE

CTI URL

PREVIEW TO DIAL OUT