

Phone Manager Application Support

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SAGE CRM



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Sage CRM




Overview

This describes the features that are available when integrating with Sage CRM.

Supported Versions

The following Sage CRM versions are supported.

Version	Supported
v5.7 - v7.0	
v7.1	
v7.2	

Editions	Supported
Sage CRM Professional Edition (Cloud)	
Sage CRM On-Premise Edition	
Sage CRM Essentials Edition (Cloud)	

Features

Integration with Sage CRM supports the features listed below:

- [Screen pop for contacts](#)

Screen pop

CRM *Person*, *Company* and/or *Lead* entities 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 entities 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 *Person* entity was found and the record was automatically displayed using the Users default browser.

The screenshot shows the Sage CRM interface. At the top, it displays 'Person: Valentino Lorenzo' and 'Company: MOTO GP' with a phone number '222 555 4444'. The main menu on the left includes options like Administration, Find, New, My CRM, Team CRM, Reports, Marketing, and Log Off. The central pane shows the 'Person' record details, including Last Name (Lorenzo), First Name (Valentino), Salutation, Middle, Suffix, Gender, Title Code, Title, Department, Territory (Worldwide), Website, and Account Manager (System Administrator). Below this, there are sections for 'Address' and 'Phone/E-mail' with fields for Street, City, State, Zip Code, Country, Business, and Mobile. A 'Company' section shows Company Name (MOTO GP), Type, Status, Source (Phone), Region, Segment, Website (http://), and Territory (Worldwide). On the right, there is a 'Call' window showing a call to 7774441111 with a duration of 00:02 and a 'Clear call' button.

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 222555444 and this has found three matching *Person* entities that have this telephone number.

The screenshot shows the Sage CRM interface with a 'Multiple Contacts Found' dialog box open. The dialog box has a 'Results' tab and lists three person records: 'Person : Carl Pedrosa', 'Person : Jorge Rossi', and 'Person : Valentino Lorenzo', all associated with 'Company : MOTO GP'. A 'Display' button is at the bottom right of the dialog. In the background, the call log window shows a call to 2225554444 with a duration of 00:01 and a 'Clear call' button.


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

Entity and matching options

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

Selecting the *Search Related Entities* option will enable any matching records that have a related entity to be displayed on the *Multiple Contacts Found* window.

The screenshot shows the Sage CRM interface with the 'Phone Fields' tab selected. A dropdown menu is open under 'Select the entities to search', listing 'Person', 'Company', and 'Lead'. The 'Search Related Entities' checkbox is checked.

 If no match is found then no records will be displayed.


Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Person*, *Company* or *Lead* Entities individually. By default the common telephone number fields are listed on the *PhoneFields* tab.

The screenshot shows the Sage CRM interface with the 'Phone Fields' tab selected. A dropdown menu is open under 'Select the telephone numbers to search', listing 'Person Business', 'Person Fax', 'Person Home', 'Person Mobile', 'Company Business', 'Lead Person Phone', and 'Lead Person Fax'.

These are the default field names and may be different if they have been customised. Contact your Sage CRM administrator for details.

Contact Entities

Entity Type	Field name	Enabled?
Person	Business	
Person	Fax	
Person	Home	
Person	Mobile	
Company	Business	
Lead	Person Phone	
Lead	Person Fax	
Lead	Alternate Phone	

Telephone number formats

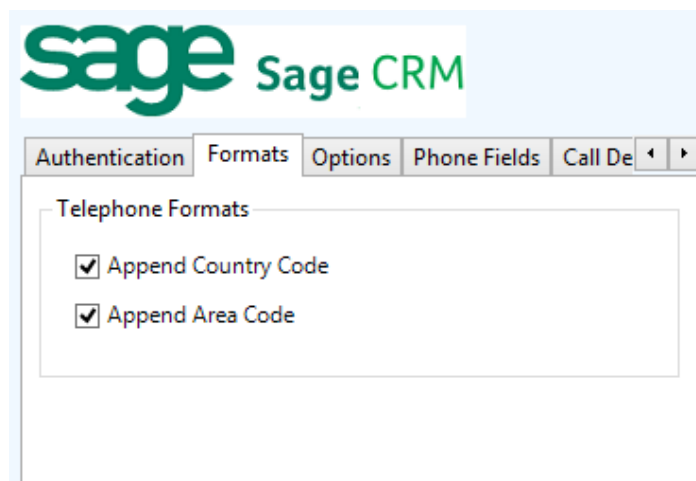
Sage CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

Sage CRM stores the country code and area code parts of each telephone number separately from the main number. From the *Formats* tab the country and area codes can be set to be appended to the telephone number when a search is made.



For example if the number, 01611234567 is stored within Sage CRM as:

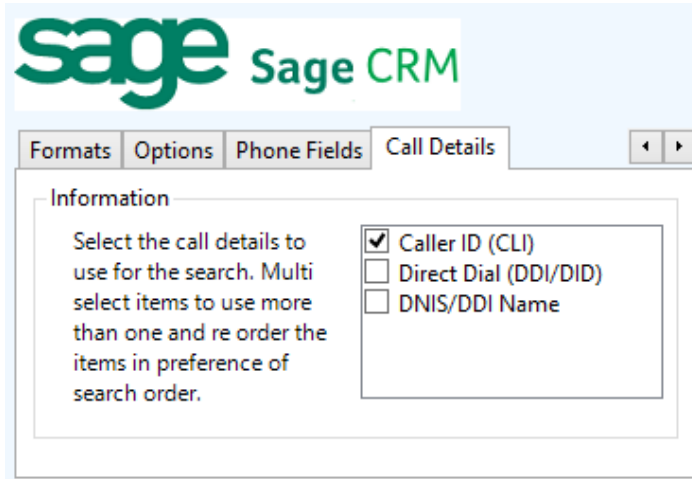
- Country Code: 44
- Area Code: 0161
- Number: 1234567


The following telephone numbers would be searched for:

- If the Append Country Code and Append Area Code are not set: 1234567
- If the Append Country Code is set and Append Area Code is not set: 441234567
- If the Append Country Code is not set and Append Area Code is set: 01611234567
- If both the Append Country Code and Append Area Code are set: 4401611234567

Call details

The call information that is used to search for matching records can be configured. By default the dialed number or the caller id are used to search with, depending on the call direction, but other call details can be configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.



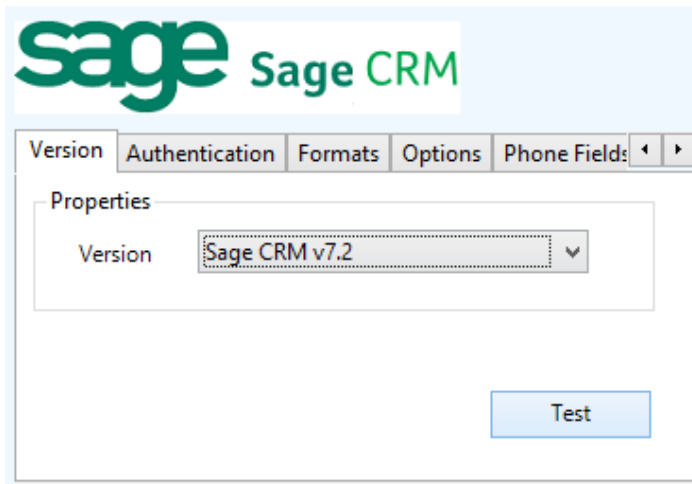
 Caller ID represents either the caller ID for inbound calls or the dialed number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

Configuration

The integration needs to be configured for the correct version of Sage CRM that is running. From the *Version* tab select the relevant entry from the drop down list.



The authentication and server connection details to the CRM server need to be set on the *Authentication* tab.

A valid Sage CRM username and password that has the web service option enabled is required to be configured into the *Username* and *Password* fields. To enable a user for web services, from Sage CRM:

1. Select Administration -> Users -> Users
2. Select Change action button
3. In Security panel set Allow Web Service Access field to True



Only one web service user can logon with the same ID at any given time. If a user tries to logon as another application an error will be displayed informing the user that they should first log out. However, it is possible to logon to the desktop or from a device with the same ID while a Web Service application is running.

The plugin uses the Sage CRM web services to integrate and this needs to be enabled on the Sage CRM server. This can be enabled from within Sage CRM:

1. Select Administration -> System -> Web Services
2. Select Change action button
3. Check the enable web service option

The web service URL can then be configured into the *URL* section. For example if the server name is called *mycrmserver* then enter:

- <http://mycrmserver/crm/eWare.dll/>

Troubleshooting

When integrating with Sage CRM v7.1+ the plugin uses the PhoneLink table within Sage CRM and this needs to be made available through the Sage CRM web service. If this is not enabled this error will be shown in the log files:

```
System.Web.Services.Protocols.SoapHeaderException:
Request Failed. Entity 'phonelink' is not Web Service enabled.
```

To enable this follow this procedure:

1. Log in to Sage CRM SQL Server
2. Select Sage CRM database
3. Click on the New Query button
4. Run:
 - `update Custom_Tables set bord_WebServiceTable='Y' where Bord_Caption ='phonelink'`
5. Run the IISRESET command
6. Login to the Sage CRM system.