ilink CRM Extensions for Panasonic Communication Assistant

Software-Version: 1.1.0.578

Contents

1. Introduction

The "ilink CRM Extensions for Panasonic Communication Assistant" increases the feature set of Panasonic CA in the flavors Pro, Console and Supervisor. It will not work with CA Basic. ilink CRM Extensions for Panasonic Communication Assistant accesses various CRM and database applications to display caller information during inbound telephone calls.

ilink CRM Extensions for Panasonic Communication Assistant also adds additional functions to dial telephone numbers.

This documents describes ilink CRM Extensions for Panasonic Communication Assistant and its CRM and database integration modules for Panasonic CA. ilink CRM Extensions for Panasonic Communication Assistant allow the integration of CRM applications and and database applications with Panasonic CA.

2. Requirements

Installing ilink CRM Extensions for Panasonic Communication Assistant requires the following:

• Windows-PC

ilink CRM Extensions for Panasonic Communication Assistant must be installed on a PC running Windows XP, Windows Vista or Windows 7.

• Panasonic CA Pro, Console or Supervisor

Panasonic CA Version 4 or higher has to be installed on the client PC and working.

• Country and area code information have to be set in the "Phone and Modem" Windows Control Panel.

List of Supported CRM Application Versions

IBM Lotus Notes 8.5

ACT! 2011/2012 Professional

ACT! 2011/2012 Premium

Sage CRM 7

Goldmine 9 Premium Edition

Maximizer CRM 11

Microsoft Dynamics CRM 2011

Salesforce.com

TigerPaw

NetSuite

SugarCRM

List of Supported Web Phone Books

Telefonbuch.de (Germany)

Das Örtliche (Germany)

Local.ch (Switzerland)
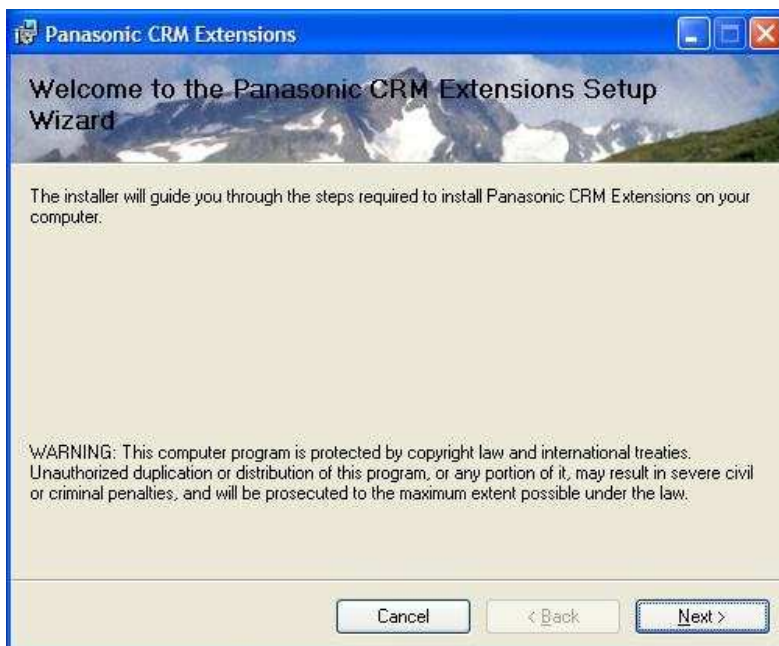
Search.ch (Switzerland)

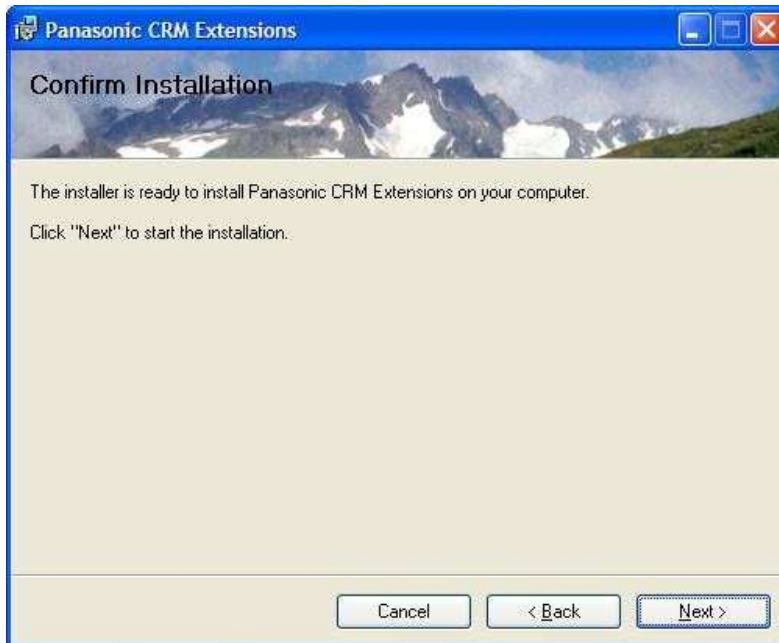Twixtel.ch (Switzerland)

Herold.at (Austria)

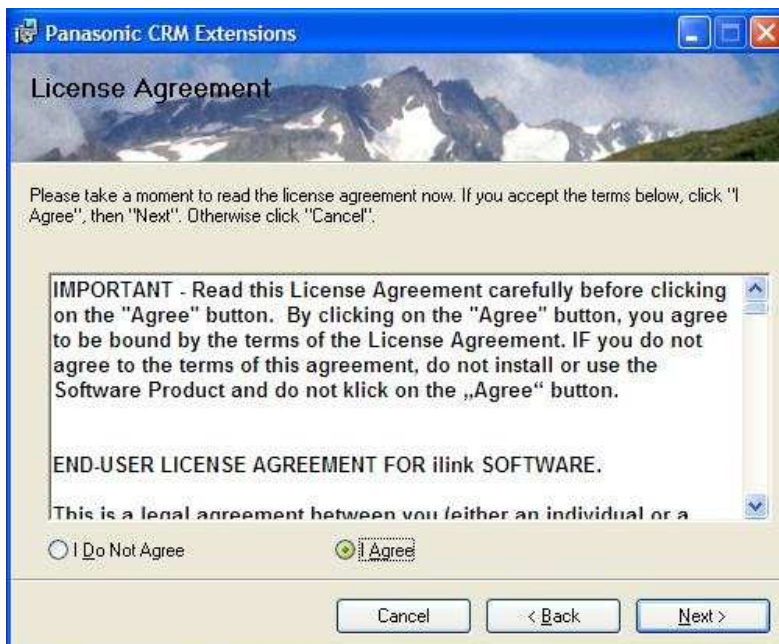Whitepages.com (US)

3. Installation

1. Double-click the SetupilinkCRMExtensions.msi installer package. The ilink CRM Extensions for Panasonic Communication Assistant installer should start.
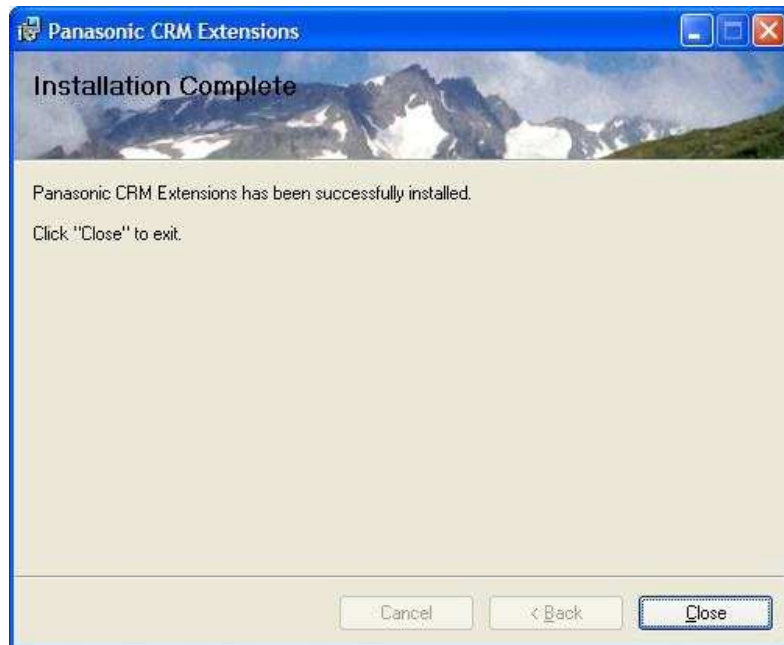

Click "Next" to start the installation.

Click "Next" to continue with the installation.

Click "Next" after agreeing to the License Agreement.

Click "Close" to finish the installation.

When installed, the application icon will be shown in the system tray.

4. License

Using ilink CRM Extensions for Panasonic Communication Assistant requires entering a valid a license key.

Entering a license key

When the application is started without a valid licence, it will prompt the user to enter a license key:
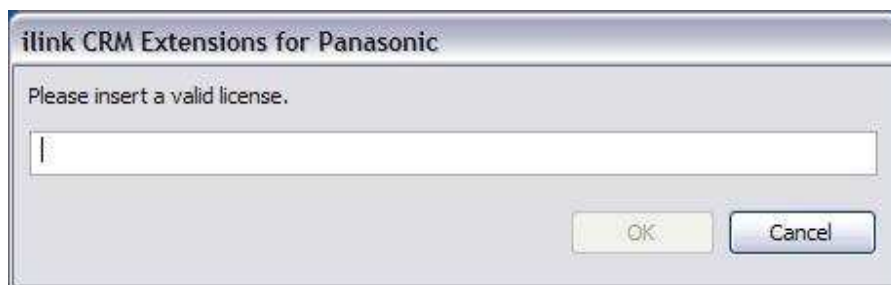
The license key can be entered at this time or later. If you do not like to enter the license now, press "Cancel".

If you like to enter the license now, enter it and click "OK".

When you entered a valid license key, a window will open to confirm that.

To enter a license later, follow the steps below.

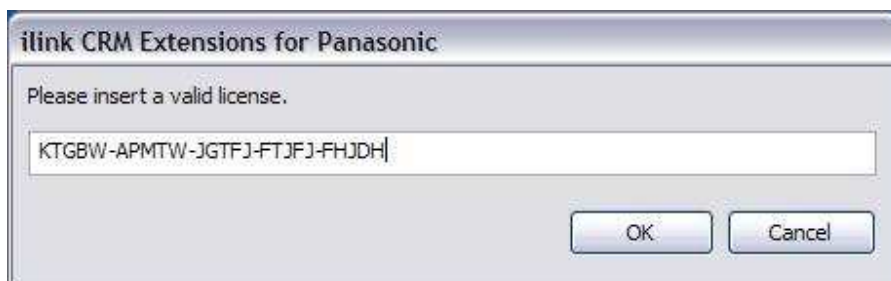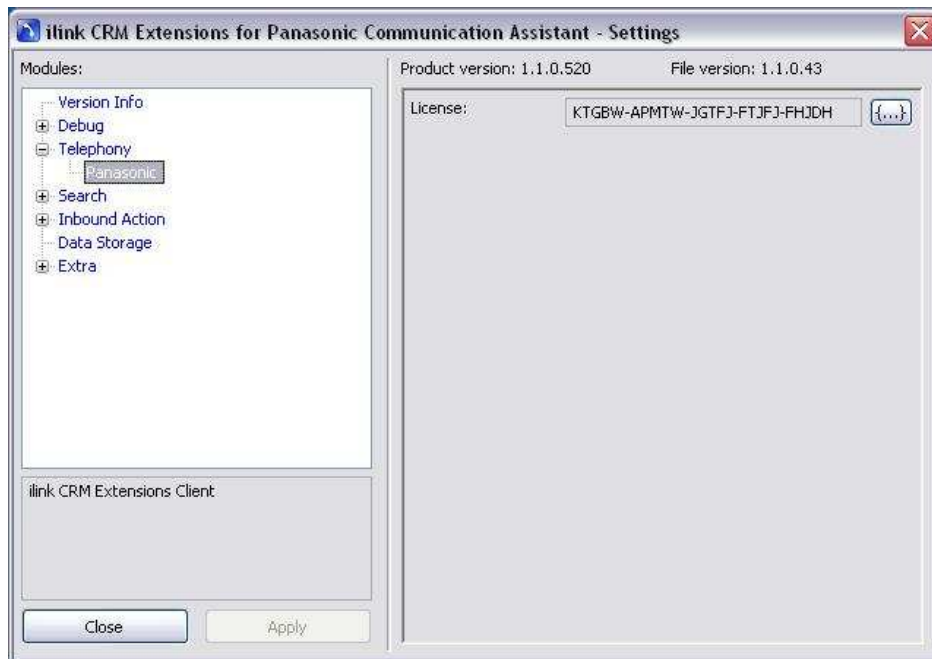1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" open "Telephony" and choose "Panasonic".

3. Click on the "{...}" button to enter the license key.

4. Click "OK".

5. CA Integration Setup

The integration with ilink ilink CRM Extensions for Panasonic CA has to be enabled in Panasonic CA.

To enable the integration, choose "Option..." from the "Go To" menu.

6. Inbound Popup Window

Configuration

To configure the behaviour of the inbound popup window, open the settings of the ilink CRM Extensions for Panasonic Communication Assistant: right click the application icon in the Windows system tray and choose "Settings...".

The following settings can be made:

In the section "Popup window"

Display Popup: Uncheck this box when the popup window should not be shown with an inbound call. The default setting is "on/checked".

Display Time in Seconds: The display time of the popup window can be set in seconds. When this option is unchecked, the popup window will stay open and has to be closed manually.

In the section "Popup position"

Use Display: Select the display number where the popup window appears.

Position: Select the corner position of the popup window to be displayed.

Usage

When configured, ilink CRM Extensions for Panasonic Communication Assistant will display a popup window when an inbound call is signalled using the Panasonic CA software. It will display the following caller information: phone number, name and company name.

The popup window will close after the number of seconds configured in the application settings. To close the popup window manually, click on "Close".

To open the identified contact in the CRM application or database, click on "Open Contact". The CRM application will open and display the identified contact.

Incoming call

0304918919

Eric Dove
10969 Berlin
Charlottenstr. 4
Berlin
Deutschland
eric.dove@ilink.de

Open Contact   Close Window

Screenshot of a popup window

When a contact could be found in a configured CRM database or Web phone directory, the telephone number, the name and the company (if found) will be shown in the popup window.

The popup window will be shown for the configured number of seconds, see above.

If supported, a button "Open Contact" is enabled. When this button is active, it can be used to open the contact record in the CRM system used.

To close the popup window, click "Close Window".

7. CRM Databases

To use ilink CRM Extensions for Panasonic Communication Assistant with your CRM or database application, the appropriate module has to be configured in the settings of the application. To open the settings, right click the application icon in the Windows system tray and choose "Settings...".

In case of an inbound call, ilink CRM Extensions for Panasonic Communication Assistant receives the telephone number from Panasonic CA and can trigger actions based on the phone number in the following order:

1. query a database lookup in an ODBC database of a CRM application and display the result in a popup window

2. query a lookup of a web based CRM application and display the result in a popup window or web page

3. query Internet phonebook services such as search.ch and display the result in a popup window

The application will display the first match and will not query other databases.

Evey module can be activated and deactivated. To activate or deactivate a module, open the application settings by right clicking the application icon in the Windows system tray and choosing "Settings..." and click on "Version Info". Check or uncheck the boxes to activate or deactivate modules.

a. Lotus Notes
Requirements

• Installed Lotus Notes Client version 6.5 and up

• Installed Lotus Notes SQL driver in a version that supports the Lotus Notes version and the Windows version.

• Working ODBC link to the Lotus Notes database

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Notes".

3. Click "Select database".

4. Click the tab "Machine Data Source", select the Data Source Name previously set up using the ODBC Control Panel that is linked to the Lotus Notes Contacts database "names.nsf."

5. Click "OK".

The ODBC Lotus Notes Connection window appears.

6. Check the values for Domino server (local) and Database (names.nsf), leave the rest to the default values and click "OK" to close the window.

7. Click "Apply".

The connection is now set up.

When receiving a call, the "ilink CRM Extensions for Panasonic Communication Assistant" popup window will appear. It will display the following caller information: phone number, name and company name.

The popup window will close after the number of seconds configured in the application settings under "Inbound Action" > "Screen Popup". To close the popup window manually, click on "Close".

To open the identified contact in Lotus Notes, click on "Open Contact". Notes will open and display the identified contact.

b. ACT! 2011/2012 Professional & Premium
Requirements

• Installed ACT! 2011 or 2012 Professional or Premium (ACT!).

• Working ODBC link to the ACT! Microsoft SQL database (SQL Server Native Client)

• Local database setup with screenshots (how to access a remote database with using a remote)

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "ACT!".

3. Click "Select database".

4. Click the tab "Machine Data Source", select the Data Source Name previously set up using the ODBC Control Panel that is linked to the ACT! database.

5. Click "OK".

6. Click "Apply."

To add the funtion to open the contact in ACT! by clicking on a button of the "ilink CRM Extensions for Panasonic Communication Assistant" application, please use the following steps:

1. Use the Windows Explorer to navigate to the installation path of "ilink CRM Extensions for Panasonic Communication Assistant" in "Program Files" > "PanasonicCRMExtensions"

2. Right click "CRMExtforACT.dll" and chose "Copy"

3. Use the Windows Explorer to navigate to the installation path of ACT!.

4. Open the "Plugins" folder.

5. Right click anywhere in the "Plugins" folder and chose "Paste" to copy the file "CRMExtforACT.dll" to the "Plugins" directory of ACT!.

6. Restart "ilink CRM Extensions for Panasonic Communication Assistant".

The connection is now set up.

When receiving a call, the "ilink CRM Extensions for Panasonic Communication Assistant" popup window will appear. It will display the following caller information: phone number, name and company name.

The popup window will close after the number of seconds configured in the application settings under "Inbound Action" > "Screen Popup". To close the popup window manually, click on "Close".

To open the identified contact in ACT!, click on "Open Contact". ACT! will open and display the identified contact.

Server Databases

To connect to a server database in a network setup, each local user has to create a remote copy of the server database in ACT! in order to use "ilink CRM Extensions for

Panasonic Communication Assistant". Please refer to the ACT! documentation on how to set up a remote copy of a server ACT! database.

c. GoldMine

Requirements

- Installed Goldmine 9 Premium Edition.

- Working ODBC link to the Goldmine 9 Premium Edition Microsoft SQL database (SQL Server Native Client)

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Goldmine".

3. Click "Select database".

4. Click the tab "Machine Data Source", select the Data Source Name previously set up using the ODBC Control Panel that is linked to the Goldmine database.

5. Click "OK".

6. Click "Apply."

The connection is now set up.

d. Maximizer
Requirements

- Installed Maximizer CRM 11.

- Working ODBC link to the Maximizer CRM 11 Microsoft SQL database (SQL Server Native Client)

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Maximizer".

3. Click "Select database".

4. Click the tab "Machine Data Source", select the Data Source Name previously set up using the ODBC Control Panel that is linked to the Maximizer database.

5. Click "OK".

6. Click "Apply."

The connection is now set up.

e. Microsoft Dynamics CRM
Requirements

• Installed Microsoft Dynamics CRM 2011.

• Working ODBC link to the Microsoft Dynamics CRM 2011 Microsoft SQL database (SQL Server Native Client)

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Microsoft Dynamics CRM".

3. Click "Select database".

4. Click the tab "Machine Data Source", select the Data Source Name previously set up using the ODBC Control Panel that is linked to the Microsoft Dynamics CRM database.

5. Click "OK".

6. Click "Apply."

The connection is now set up.

When receiving a call, the "ilink CRM Extensions for Panasonic Communication Assistant" popup window will appear. It will display the following caller information: phone number, name and company name.

The popup window will close after the number of seconds configured in the application settings under "Inbound Action" > "Screen Popup". To close the popup window manually, click on "Close".

To open the identified contact in Microsoft Dynamics CRM, click on "Open Contact".

Microsoft Dynamics CRM will open and display the identified contact.

f. Sage CRM
Requirements

• Installed Sage CRM 7.

• Working ODBC link to the Sage CRM 7 Microsoft SQL database (SQL Server Native Client)

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Sage CRM".

3. Click "Select database".

4. Click the tab "Machine Data Source", select the Data Source Name previously set up using the ODBC Control Panel that is linked to the Sage CRM 7 database.

5. Click "OK".

6. Click "Apply."

The connection is now set up.

g. Tigerpaw CRM
Requirements

• Installed Tigerpaw CRM 11.

• Working ODBC link to the Tigerpaw CRM Microsoft SQL database (SQL Server Native Client)

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Tigerpaw CRM".

3. Click "Select database".

4. Click the tab "Machine Data Source", select the Data Source Name previously set up

using the ODBC Control Panel that is linked to the Sage CRM 7 database.

5. Click "OK".

6. Click "Apply."

The connection is now set up.

h. NetSuite
Requirements

• Access to Netsuite.

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Netsuite".

3. Activate the NetSuite lookup by checking the "Activate NetSuite" lookup checkbox.

4. Enter the values for "Name", "Password" and "Account ID".

The account ID can be found in Netsuite at Home > Setting menu > Set Up Synchronization under Step 2 "Set up the client". The account ID has to be set up for every account/user.

5. Click "OK".

6. Click "Apply."

The connection is now set up.

i. Salesforce
Requirements

• Access to Salesforce.com.

• API access to Salesforce.com

  • API access is available for the following Salesforce editions: Enterprise, Unlimited and

Developer

- A user has to be logged into Salesforce.com for the lookup to function.

- Credentials and password plus security token info

- How to obtain a security token from Salesforce.com:
  http://trust.salesforce.com/trust/security/identity_feature.html

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "Salesforce".

3. Enter your Salesforce user name in "Name:"

4. **Enter your Salesforce password plus the security token as one string without any whitespace. See the note under "Requirements" above.**

5. Click "OK".

6. Click "Apply."

The connection is now set up.

j. SugarCRM
Requirements

- Access to SugarCRM.

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search" choose "SugarCRM".

3. Activate the SugarCRM lookup by checking the "Activate SugarCRM" lookup checkbox.

4. Enter the values for "Name", "Password" and "Server".

5. Click "OK".

6. Click "Apply."

The connection is now set up.

k. Custom ODBC CRM

Requirements

• Installed CRM System with ODBC database engine

• Working ODBC link to the CRM database

Configuration

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "ODBC".

3. Click "Select database".

4. Select the appropriate ODBC data source.

5. Click "OK"

6. Enter the SQL search query in the "SQL Query:" text field.

7. Click "Apply"

The connection is now set up.

l. Das Örtliche (Germany)

A German directory service for local businesses. To activate the search in public phone directories
1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

m. Das Telefonbuch (Germany)

The major German directory service. To activate the search in public phone directories

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

n. search.ch (Switzerland)

A swiss directory service with access to the major swiss datasource Swisscom Directories AG, the same that is used by twixtel.ch and local.ch. To activate the search in public phone directories

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

o. local.ch (Switzerland)

A swiss directory service with access to the major swiss datasource Swisscom Directories AG, the same that is used by twixtel.ch and search.ch. To activate the search in public phone directories

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

p. twixtel.ch (Switzerland)

A swiss directory service with access to the major swiss datasource Swisscom Directories AG, the same that is used by local.ch and search.ch. To activate the search in public phone directories

1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

q. Whitepages (USA)

A directory service for US businesses. To activate the search in public phone directories
1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

r. Herold.at (commercial) (Austria)

The major Austrian directory service split up in two parts, one for commercial entries and one for private entries. To activate the search in public phone directories
1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

s. Herold.at (private) (Austria)

The major Austrian directory service split up in two parts, one for commercial entries and one for private entries. To activate the search in public phone directories
1. Right click "ilink CRM Extensions for Panasonic Communication Assistant" application icon in the Windows tray and choose "Settings" to open the settings windows.

2. On the left, under "Modules" > "Search", choose "Internet".

3. Activate or deactivate the desired phone directory modules.

When the calling party's telephone number is listed for reverse search in one of the directories and the phone directory module is activated, the name will be displayed in the screen pop window of ilink CRM Extensions for Panasonic Communication Assistant.

Make sure, your Windows "Phone & Modem Options" settings are correct.

8. Dialing

Phone numbers can be dialed in several ways: by dragging a phone number from an application to the ilink CRM Extensions for Panasonic Communication Assistant application icon, by copying a phone number from an application and choosing the "Call" command from the tray menu of ilink CRM Extensions for Panasonic Communication Assistant, by defining a key event or key combination in order to dial a selected phone number and by using the context menu when right-clicking a text selection.

• Dialing Selectable Text via Hotkey

Selected phone numbers (e.g. in an e-mail, a Word document, or on a web page) can directly be dialed

• Dialing selectable text via Copy & Paste

Phone numbers that have been copied to the Windows clipboard with the "Copy" command can be dialed via the integration modules tray menu (right click on the icon).

• Dialing selectable text via Drag & Drop

Phone numbers selected in a program that allows to use the mouse to drag selected text out of the document (e.g. Word or Internet Explorer) may be dropped onto the integration modules tray icon for dialing.

9. Deinstallation

The uninstall process varies slightly between Windows Operating Systems (Windows XP, Windows Vista, Windows 7). The following description is based upon Windows XP.

Under **Start | Control Panel | System | Add or Remove Programs** you can view a list of the software installed on the computer. To deinstall ilink CRM Extensions for Panasonic Communication Assistant, first find ilink CRM Extensions for Panasonic Communication Assistant in the list and then click "Remove".

10. Trademarks

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