

Phone Manager Application Support - SalesLogix

DECEMBER 2016

DOCUMENT RELEASE 5.0

APPLICATION SUPPORT



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SalesLogix

Overview

This describes the features that are available when integrating with SalesLogix.

Supported Versions

The following SalesLogix versions are supported.

Version	Supported
Version 7.0	 *^
Version 7.1	 *^
Version 7.2	 ^
Version 7.5 SP2	 ^

* - Click to dial feature is not supported
 ^ - Requires the Windows LAN client

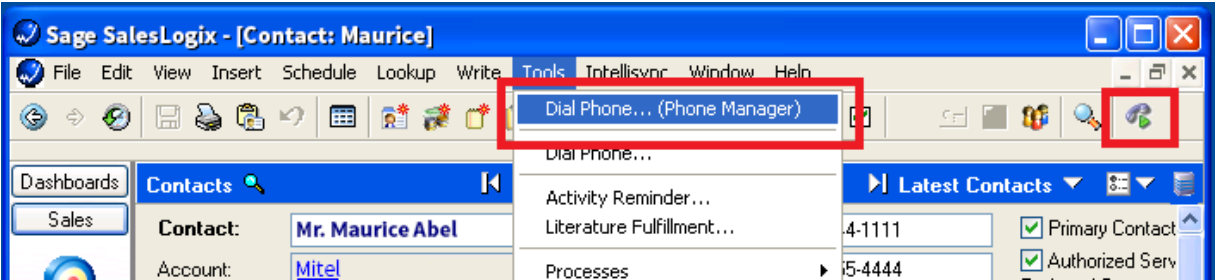
Features

Integration with SalesLogix supports the features listed below:

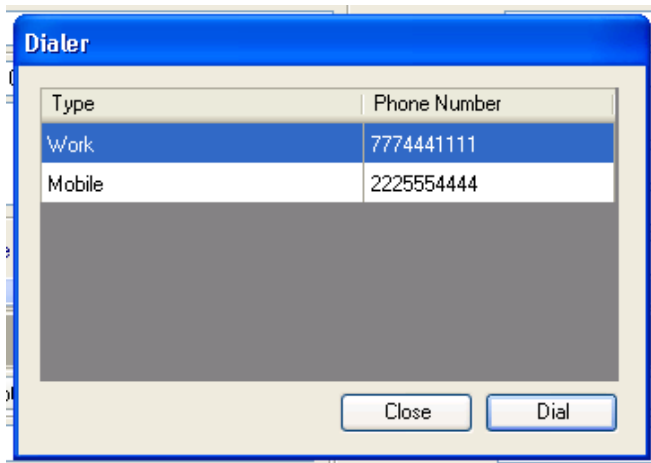
- [Click to dial](#)
- [Screen pop](#)
- [Automatic call history entry](#)
- [Calendar & DND synchronization](#)

Click to dial

When a record is displayed a new telephone icon is shown on the toolbar and a *Dial Phone* entry is added to the SalesLogix *Tools* menu.



When the telephone icon is clicked a new window is displayed that shows all of the telephone numbers that are available for this record.

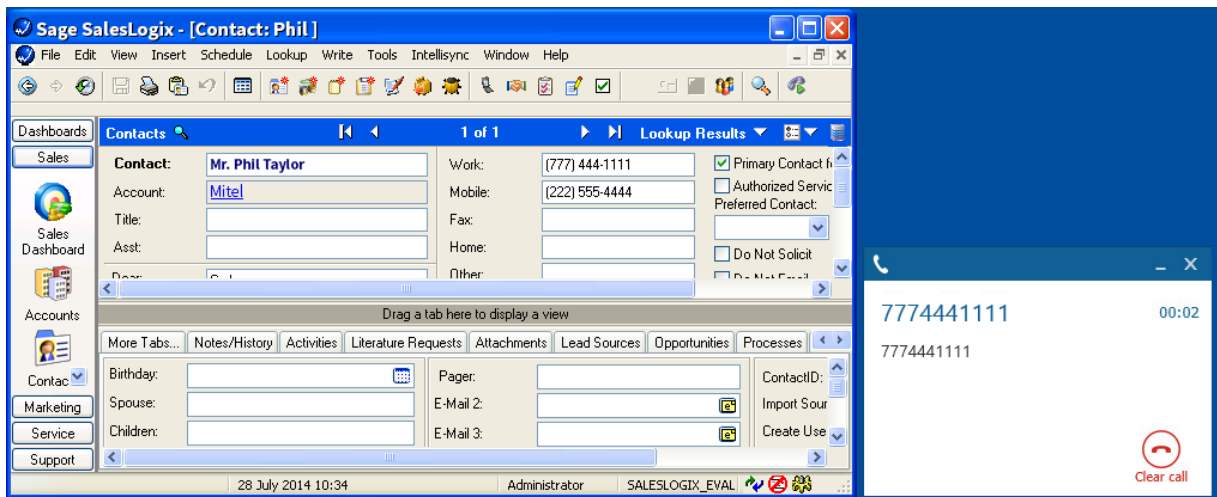


Selecting any of the rows and clicking *Dial* or double clicking the row will cause the selected number to be called.

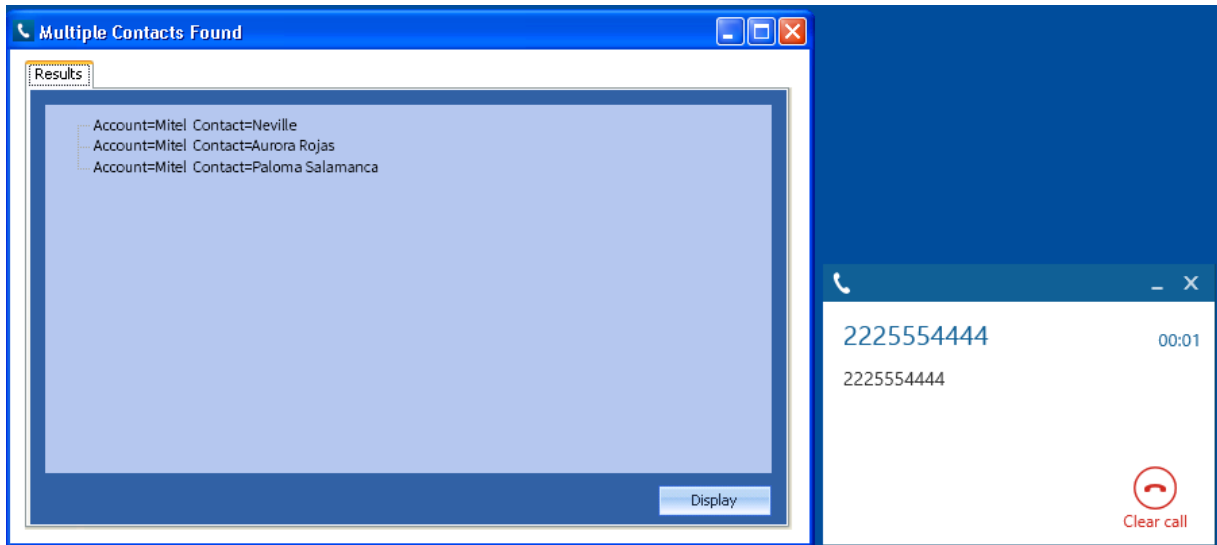
- This requires Phone Manager to be running in the same Windows session as SalesLogix.
- If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.
- This direct dial out replaces the built in TAPI based "Dialer" feature within SalesLogix and should not be used at the same time.
- The SalesLogix bundle is available on request and needs to be installed by your SalesLogix administrator (see the [SalesLogix Bundle](#) section for details)

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesLogix 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 *Contact* entity was found and the record was automatically displayed with SalesLogix.



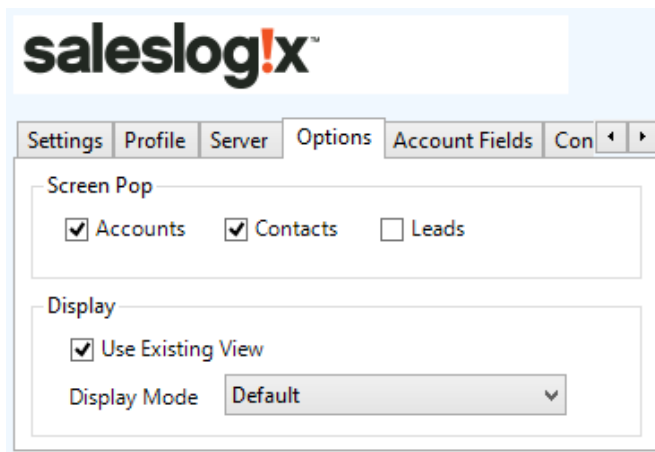
If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Contact* entities that have this telephone number.



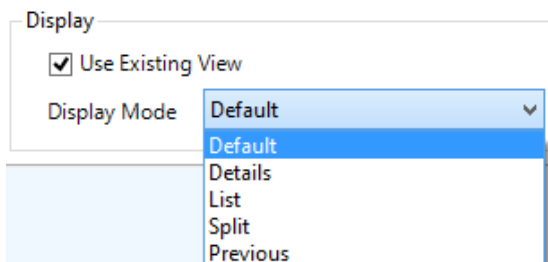
The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

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



When SalesLogix is screen popped the display mode for how any matching records are shown can be configured as shown.



Selecting the *Use Existing View* option will use the current view settings. These settings are equivalent to the options available in the *View* menu within SalesLogix.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* records individually. By default the common telephone number fields are listed in the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.

saleslogix™

Options Account Fields Contact Fields Lead Fields Ad

Select the CRM account telephone numbers to search

- Main
- Alternate
- Fax
- Toll Free
- Toll Free 2
- Other Phone 1
- Other Phone 2

Contact Entities

Field name	Enabled?
Work	
Mobile	
Fax	
Home	
Other	
Pager	
User Field 1	
User Field 2	
User Field 3	
User Field 4	
User Field 5	
User Field 6	
User Field 7	
User Field 8	
User Field 9	
User Field 10	

Account Entities

Field name	Enabled?
Main	

Alternate	
Fax	
Toll Free	
Toll Free 2	
Other Phone 1	
Other Phone 2	
Other Phone 3	
User Field 1	
User Field 2	
User Field 3	
User Field 4	
User Field 5	
User Field 6	
User Field 7	
User Field 8	
User Field 9	
User Field 10	

Lead Entities

Field name	Enabled?
Work	
Home	
Mobile	
Fax	
Toll Free	
User Field 1	
User Field 2	
User Field 3	
User Field 4	

User Field 5	
User Field 6	
User Field 7	
User Field 8	
User Field 9	
User Field 10	

Telephone number formats

SalesLogix 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			

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a SalesLogix Phone Call activity. 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 telephone numbers used to search are set in the [screen popping](#) section.

The activity record is automatically created with the information relating to the call entered into the *Notes* field and the related records are linked as shown.

Complete Phone Call For Nacho Valencia

Completed: 28/07/2014 11:05 Scheduled: 28/07/2014 11:05

Duration: 60 minutes ☐ Timeless

Result:

Follow-Up: ☒ Meeting... ☐ Phone Call... ☒ To-Do... ☒ Carry Over Notes

Contact: [Sastre, Isa](#) Opportunity:

Account: [Mitel](#) Ticket:

Regarding: Inbound call from 2225554444

Notes...

 Start Time : 28/07/2014 11:05:50
 End Time : 28/08/2014 12:05:50
 Result :
 Call Recording : <http://mitelrecorder/default.aspx?recID=123456>

Priority: Category:

Leader: Process Manager Scheduled by Administrator on 28/07/2014 11:05:52

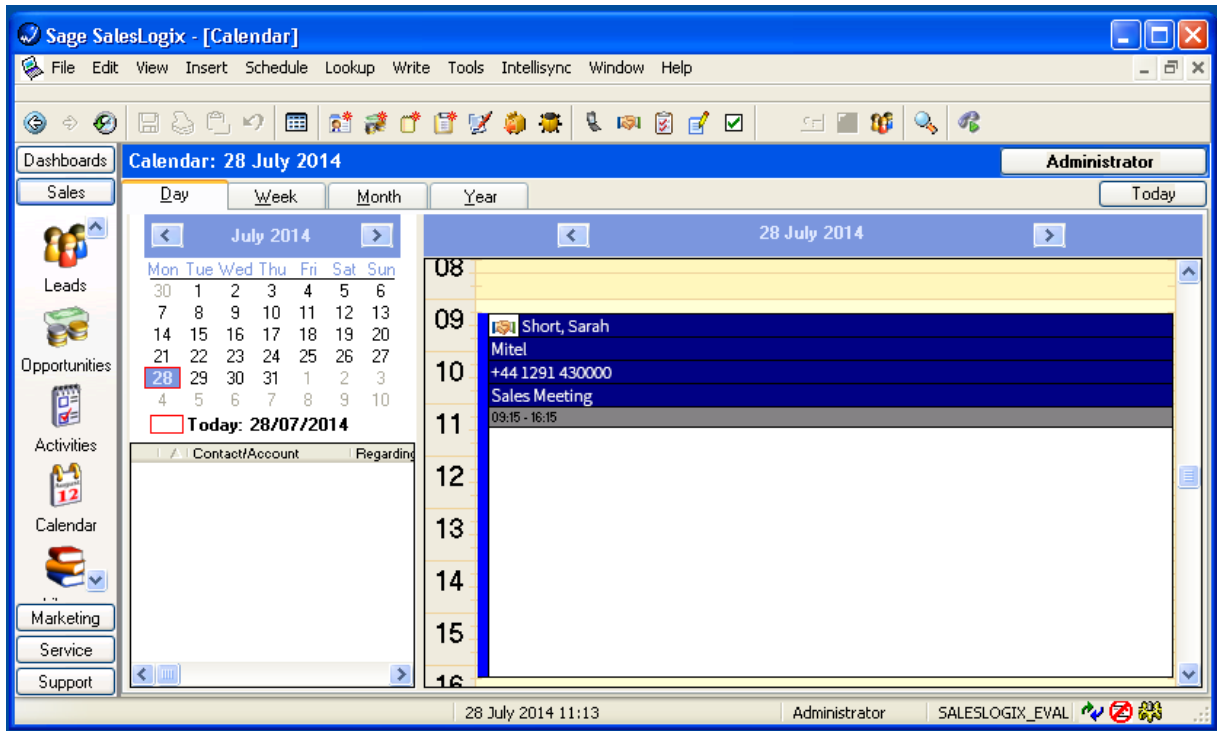
OK Cancel Help

Start Time	The date and time when the call was started.
End Time	The date and time when the call was ended.
Result	The account code entered on the call.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording is 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 recording when the call has been answered.

Calendar & DND synchronization

The calendar within SalesLogix can be synchronized with the DND status of the extension of the User. For example when there is a meeting in the calendar and this is due the extension can be automatically placed into DND with the DND text set to the *Regarding* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

For example the *Meeting* entry below will place the Users extension into DND between 09:00 and 16:30 with the DND text set to "Sales meeting".

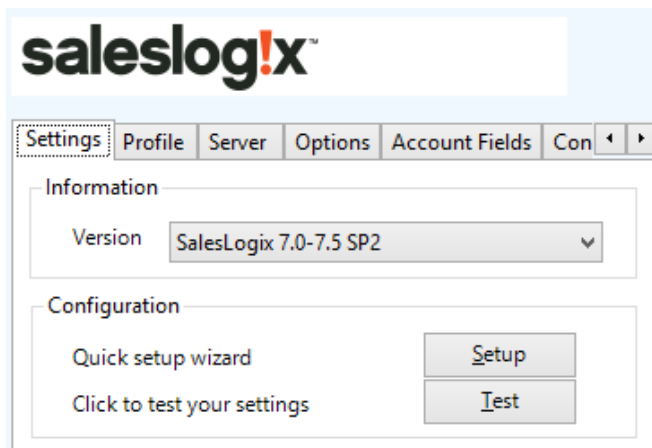


Configuration

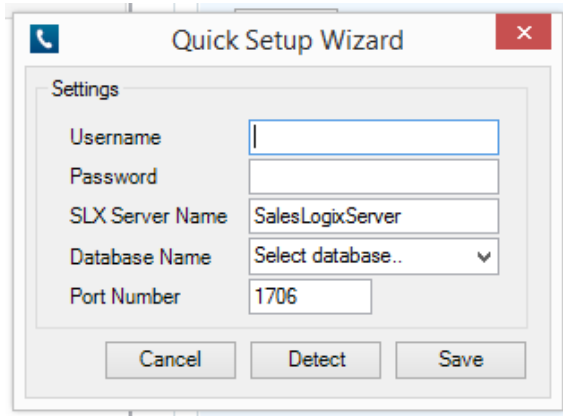
For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to SalesLogix.

Wizard

The *Settings* tab provides a *Quick Setup Wizard* to enable these to be easily configured.



Click on the *Setup* button to start the wizard.

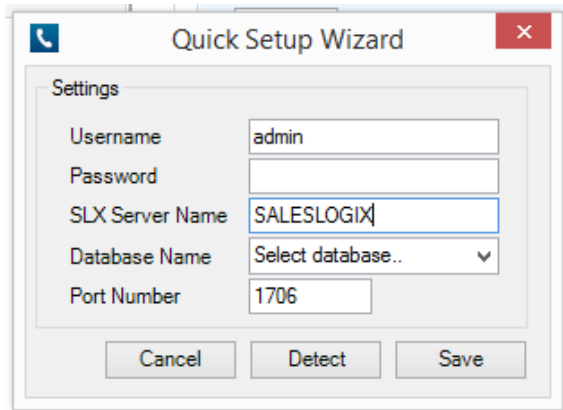


The 'Quick Setup Wizard' dialog box is shown with the following fields:

- Username: [Empty text box]
- Password: [Empty text box]
- SLX Server Name: SalesLogixServer
- Database Name: Select database.. (dropdown menu)
- Port Number: 1706

Buttons at the bottom: Cancel, Detect, Save.

Ensure that SalesLogix is open and then click on *Detect* and this will complete the form automatically.

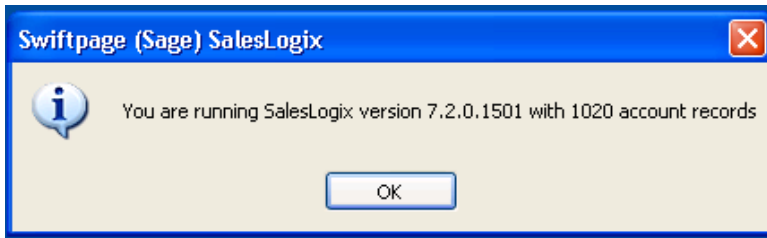


The 'Quick Setup Wizard' dialog box is shown with the following fields populated:

- Username: admin
- Password: [Empty text box]
- SLX Server Name: SALESLOGIX
- Database Name: Select database.. (dropdown menu)
- Port Number: 1706

Buttons at the bottom: Cancel, Detect, Save.

Select the *Database Name* for the SalesLogix database to use and then click *Save*. From the *Settings* tab click on the *Test* button to validate the details and a confirmation message will be displayed if the configuration is successful.



The 'Swiftpage (Sage) SalesLogix' message box displays the following information:

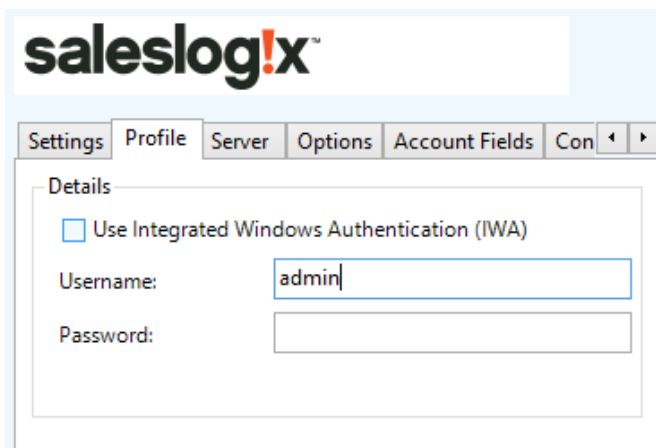
- You are running SalesLogix version 7.2.0.1501 with 1020 account records

Button: OK

If this fails then more options can be configured on the other tabs.

Authentication profile

The Profile tab enables the security credentials used to access SalesLogix to be configured.



The 'saleslog!x' application window is shown with the 'Profile' tab selected. The 'Details' section contains the following options:

- ☐ Use Integrated Windows Authentication (IWA)
- Username: admin
- Password: [Empty text box]

Other tabs visible: Settings, Server, Options, Account Fields, Con.

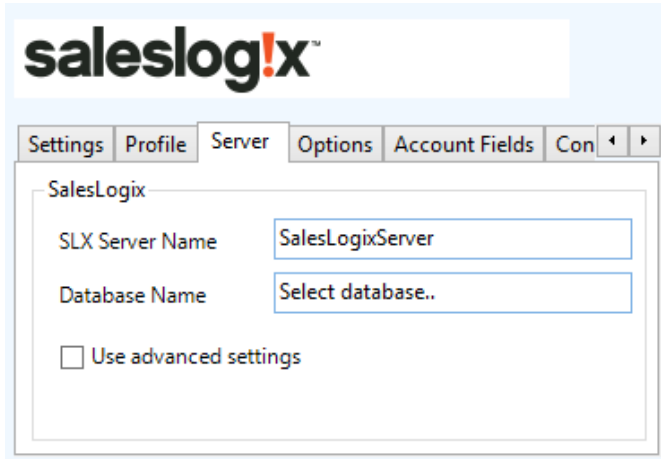
Use Integrated Windows Authentication: If this is set then the username, password and domain details from user who is logged on

the computer will be used.

Depending on the configuration of Sage SalesLogix and how it is accessed will dictate what options are required. For example if a different user account is used to access SalesLogix than what is currently logged into the computer then they will need to be manually entered.

Server details

The *Server* tab enables the server details and database that is to be used to be configured.



The screenshot shows the SalesLogix configuration window with the 'Server' tab selected. The window has a title bar with the SalesLogix logo. Below the title bar are tabs: Settings, Profile, Server (selected), Options, Account Fields, and Con. The main area is titled 'SalesLogix' and contains the following fields:

- SLX Server Name: A text box containing 'SalesLogixServer'.
- Database Name: A dropdown menu showing 'Select database..'.
- Use advanced settings: An unchecked checkbox.

SLX Server Name: The server name or IP address of the computer hosting the SalesLogix database.

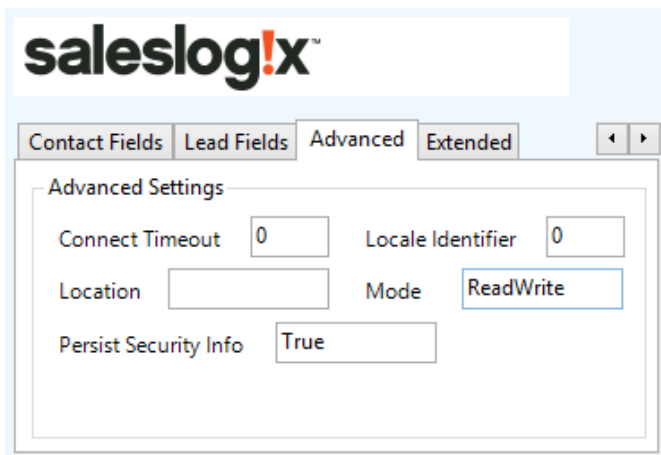
Database Name: The name of the SalesLogix database to use.

Advanced Settings: Enables the Advanced and Extended tabs for extra configuration options.

Advanced options

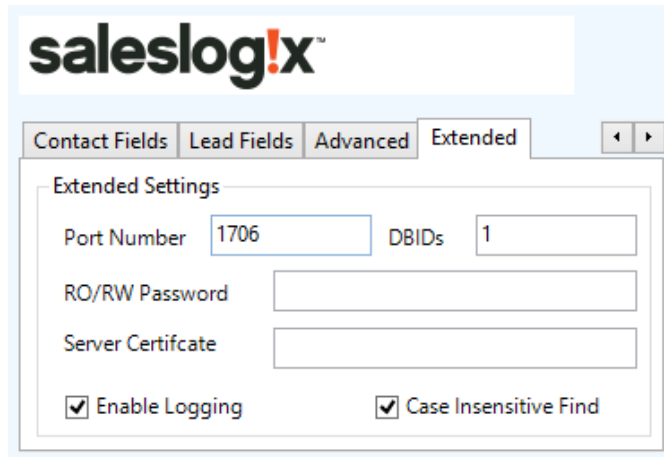
The *Advanced* and *Extended* tab enables more advanced options to be configured.

 These options are not normally required to be changed, contact your SalesLogix administrator for details.



The screenshot shows the SalesLogix configuration window with the 'Advanced' tab selected. The window has a title bar with the SalesLogix logo. Below the title bar are tabs: Contact Fields, Lead Fields, Advanced (selected), and Extended. The main area is titled 'Advanced Settings' and contains the following fields:

- Connect Timeout: A text box containing '0'.
- Locale Identifier: A text box containing '0'.
- Location: A text box.
- Mode: A dropdown menu showing 'ReadWrite'.
- Persist Security Info: A text box containing 'True'.



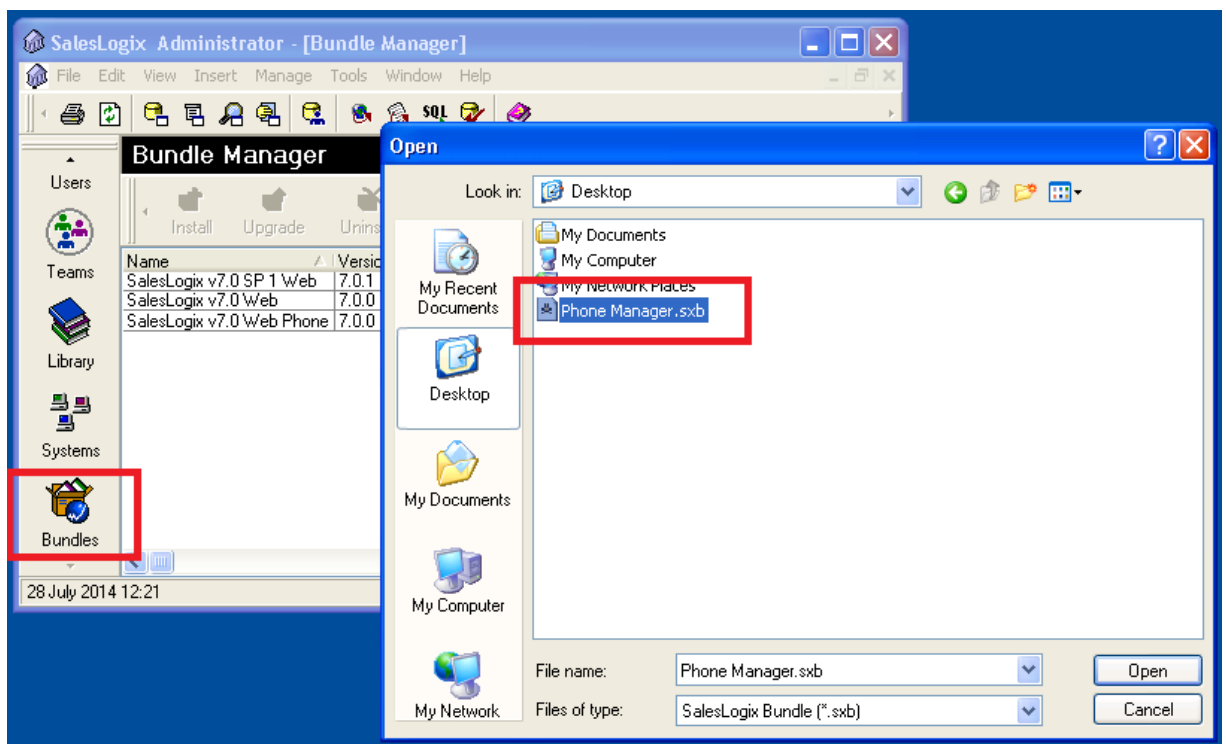
The image shows the 'Extended Settings' window in the SalesLogix Administrator. It has tabs for 'Contact Fields', 'Lead Fields', 'Advanced', and 'Extended'. The 'Extended' tab is selected. The settings include:

- Port Number: 1706
- DBIDs: 1
- RO/RW Password: (empty field)
- Server Certificate: (empty field)
- ☒ Enable Logging
- ☒ Case Insensitive Find

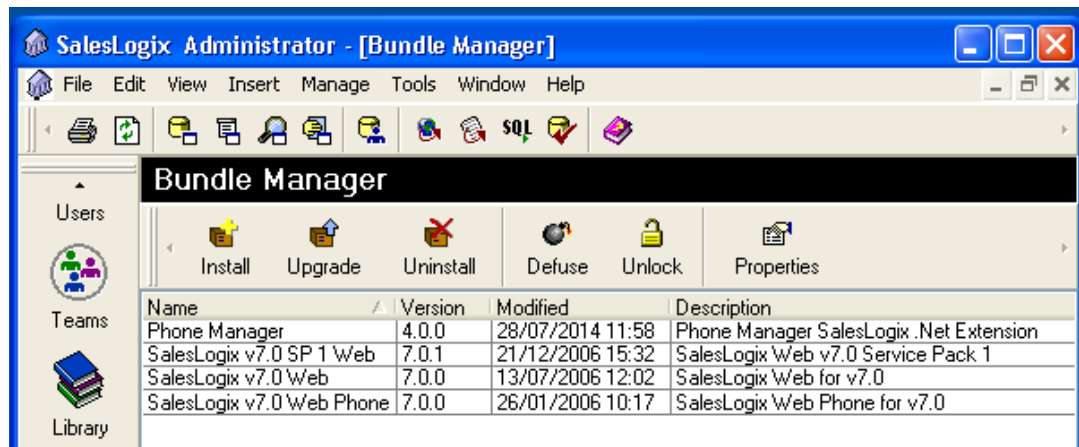
Sales Logix Bundle

SalesLogix allows for 3rd party integration components to be installed into the SalesLogix environment to provide additional features. To install the SalesLogix bundle the following steps need to be performed.

1. Run the SalesLogix Administrator Program.
2. Click the Bundles button.
3. Click the Install button.
4. Locate and select the Phone Manager Bundle.



5. Click OK on the Choose Actions To Install window.
6. If prompted select to allow the plugin to be released and select the group to release to.
7. The Phone Manager Bundle should then be displayed in the list.



8. Close SalesLogix Administrator Program.
9. Installation is complete, open SalesLogix.