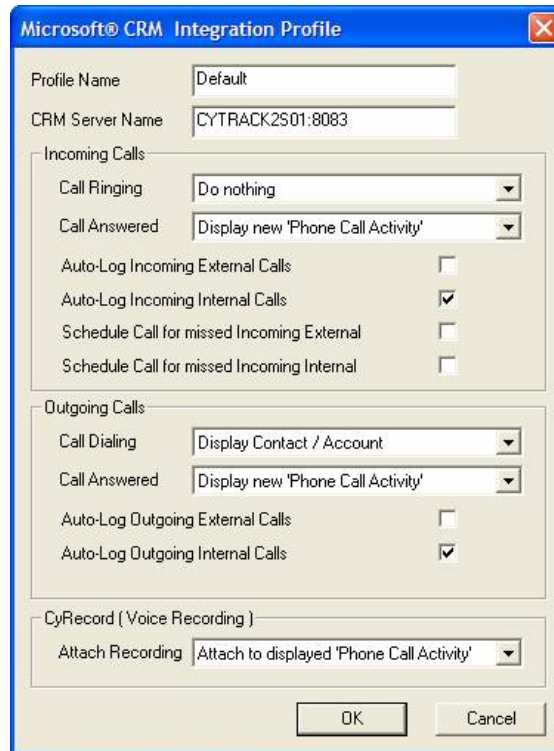


CyPhone CRM Integration Profile

Microsoft CRM

1.1. Microsoft CRM

The configuration screen for an MS CRM integration profile is as follows :



The screenshot shows a dialog box titled "Microsoft® CRM Integration Profile". It contains the following fields and options:

- Profile Name: Default
- CRM Server Name: CYTRACK2501:8083
- Incoming Calls:**
 - Call Ringing: Do nothing
 - Call Answered: Display new 'Phone Call Activity'
 - Auto-Log Incoming External Calls:
 - Auto-Log Incoming Internal Calls:
 - Schedule Call for missed Incoming External:
 - Schedule Call for missed Incoming Internal:
- Outgoing Calls:**
 - Call Dialing: Display Contact / Account
 - Call Answered: Display new 'Phone Call Activity'
 - Auto-Log Outgoing External Calls:
 - Auto-Log Outgoing Internal Calls:
- CyRecord (Voice Recording):**
 - Attach Recording: Attach to displayed 'Phone Call Activity'

Buttons: OK, Cancel

1.1.1. CRM Server Name

This field allows the Microsoft CRM server host name and port to be entered in a central location.

1.1.2. Incoming Calls

The incoming calls section of the configuration screen displays the options available when an incoming call is received. The options are as follows :

Do Nothing – The details of the caller will be displayed in the CyPhone tooltip only

Display Contact / Account – The Microsoft CRM 'Contact Detail' screen will be displayed for the contact if the calling number is recognized

Display New Phone Call Activity – A Microsoft CRM 'Phone Call Activity' will be displayed

Auto-Log Internal/External Calls - When these options are enabled, the details of calls received will be automatically logged as completed activities in the history of the associated contact in Microsoft CRM

Schedule Call For Missed Incoming Internal / External - If this option is enabled, all missed internal or external calls will result in an activity being scheduled to notify the recipient of the missed call.

1.1.3. Outgoing Calls

The outgoing calls section of the configuration screen displays the options available when an outgoing call is made. The options are as follows :

Do Nothing – The details of the person you are calling will be displayed in the CyPhone tooltip only

Display Contact / Account – The Microsoft CRM 'Contact Detail' screen will be displayed for the contact if the called number is recognized

Display New Phone Call Activity – A Microsoft CRM 'Phone Call Activity' will be displayed

Auto-Log Internal/External Calls - When these option are enabled, the details of calls made will be automatically logged as completed activities in the history of the associated contact in Microsoft CRM

1.1.4. Voice Recording

Do not attach – Do not attach any voice recording to any incoming / outgoing phone calls.

Attach to displayed 'Phone Call History' - If this option is enabled and CyRecord is used to record a voice conversation, the recording will be attached as a note to the history item associated with the call that is currently being displayed.

Attach to new 'Phone Call History' - If this option is enabled and CyRecord is used to record a voice conversation, the recording will be attached as a note to a new history item associated with the call.