

Add-in Guide – SalesLogix v2.4



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SalesLogix 7.2 – 7.5 Add-in Guide

This document will guide you through configuration and basic use of **PHONE-LiNK**'s SalesLogix Add-in. It is expected that you are already familiar with the Address Book, Call History and Preview window, and the basic concepts of integration and screen popping using the Add-in. See the 'User Guide' for these topics.

This guide contains fairly straightforward topics and is appropriate for most end users, system administrators and installation engineers.

Duration: 10 minutes

SalesLogix and the database used to store your contact data should already be installed and working normally before proceeding with this integration.

PHONE-LiNK must also be installed already with the initial configuration completed. If this is not the case, please see the 'Technical Installation Guide' or consult your system administrator.

Information You'll Need

- Windows account username and password
- SalesLogix server, username and password

Configuration

Right-click on the tray menu, and choose "Settings". Once you are on the Settings page click on the CRM integration and choose "Get full license" option. Select **SalesLogix** from the 'Type' dropdown box and click on the "Configure" button.



On the Configuration screen, select the SQL server where your SalesLogix database is stored from the **Server** dropdown box. If there are no options in this list, wait for the animated circle to disappear and then check again; the circle indicates the list is updating; you can also type the name in manually.

If you can use your Windows login details to access SalesLogix, tick the **Windows authentication** tick box. Otherwise, enter your username and password into the **User** and **Password** text boxes.

Select the correct database from the **Database** dropdown list; the list will update once you have selected your server or you can enter the name manually.

In the **Types** section, select the SalesLogix account contact types you want to be used by ticking the corresponding boxes.

Click the **'OK'** and the **'Save'** button to store the information you've entered and apply the configuration.

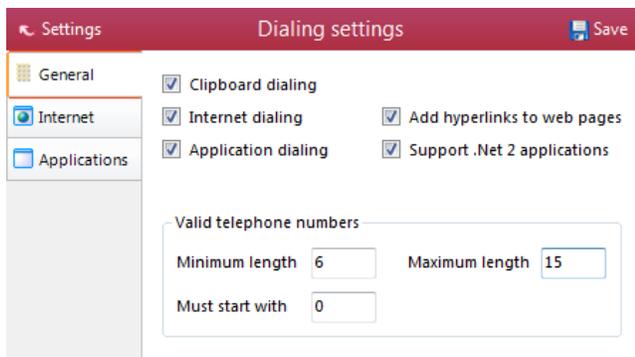
Testing

To test if the configuration worked, enter a phone number from your SalesLogix company account into the 'Telephone' box in the "Quick test" tab (Status should show as "LOADED") and click the 'Search' button. The results will be displayed after a few seconds

The test area results should look similar to the results showing in the figure above. If the test does not work or you get an error, go to the 'Log' tab to check for any errors in the log.



Dialing configuration



To dial out from within SalesLogix, dialling needs to be configured correctly.

Go to 'Dialing settings' option and in the "General" tab make sure that the 'Application dialling' and 'Support .Net 2 applications' boxes are ticked.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the **Minimum length** and **Maximum length**

length text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the **Must start with** box.

Click on 'Applications' tab to start **PHONE-LiNK's** Dialling wizard.

Open SalesLogix and navigate to a screen that has a unique telephone number already in it. Back in **PHONE-LiNK's** wizard, click and hold the target icon, drag it over the textbox containing the telephone number and then let go. If the wizard finds a valid number, it will display the details. Remember to save those settings.

You can add as many textboxes as you like, just start the process by clicking the **Add** button and working your way through again. The wizard only offers to setup the default values once per session so just exit and reload the client to try again.



Click **Save** to store your settings and you're ready to go.

Now, a clickable icon appears at the end of any textboxes you have configured when you hover the mouse cursor over them and you just click on the icon to dial the number in the textbox.

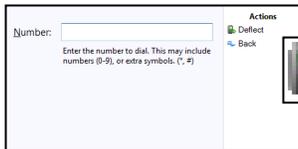


Functionality



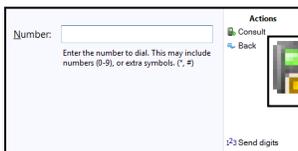
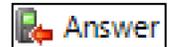
When a call comes in, the PHONE-LiNK client's Preview Window will pop up and display the phone number that is calling. If the caller is recognised as one of your contacts from SalesLogix, their details will also be displayed and you can 'pop' their SalesLogix contact record by clicking the **SalesLogix** button in the window.

You can also pop recognised callers' SalesLogix contact records by clicking the **SalesLogix** button on the Phone Window.

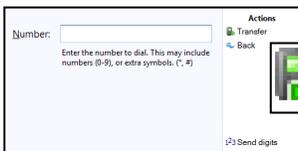


Calls can be deflected to another extension before answering them by clicking the **Deflect** button, entering the extension number and clicking **Deflect** again.

To answer a call on either the Preview or Phone window, you just need to click the **Answer** button.



To speak to a colleague during an active call, click the **Consult** button, enter the extension number and click **Consult** again; the active call is automatically held. To end the call to your colleague and resume the held call, click **Cancel** or to complete the transfer, click **Complete**.



To transfer a call to another extension, click the **Transfer** button, enter the extension number and click 'Transfer' again.