SuperOffice Addin Guide

For information on setting up dialing with SuperOffice CRM, please click here.

This page will guide you through configuration and basic use of the CRM Connect SuperOffice CRM 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-ins. See the 'User Guide' for these topics.

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

CRM Connect 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.

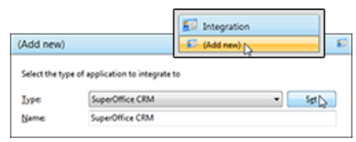
Information You'll Need

- Windows account username and password
- SuperOffice CRM data source name, prefix, username and password (if password protected)*
- CRM Connect main program file directory

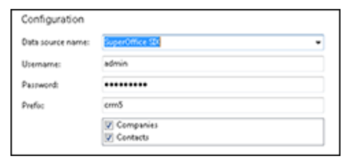
* Instructions on where to find this information are given below if required.

Configuration

Right-click the CRM Connect tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'configuration' screen. In the 'Integration' area, click the 'Add new' button, select 'SuperOffice CRM' from the 'Type' dropdown box and then click the 'Set' button.



On the Configuration group, in the 'Data source name' drop down box, pick your data source name. You can find out what your data source is called by opening the file called 'SuperOffice.ini' in your SuperOffice program folder and looking for the line that starts with 'Datapath=ODBC:'. Whatever follows the ':' is the name of your data source. For example, if the line in the 'SuperOffice.ini' file reads 'Datapath=ODBC:SuperOffice SIX', the data source name is 'SuperOffice SIX'.



Enter your SuperOffice database login information into the 'Username' and 'Password' textboxes. Note that using SuperOffice user account login details will not work.

Enter your SuperOffice global prefix into the 'Prefix' textbox. Again, this information can be found in the 'SuperOffice.ini' file in your SuperOffice program folder. Find the line that starts with 'GlobalPrefix='. Whatever follows the '=' is the prefix you need to enter. For example, if the line in the ini file reads 'GlobalPrefix=crm5', the prefix is 'crm5'.

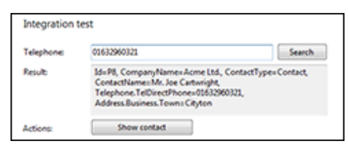
'Companies' and 'Contacts' are the categories of record in SuperOffice that can be looked up in searches and popped. Select either or both by checking the corresponding boxes to include them.

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

Testing

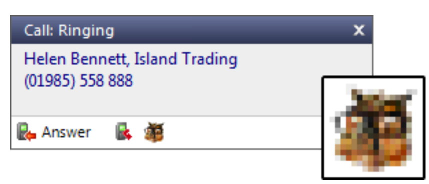
To test if the configuration worked, enter a phone number from your SuperOffice CRM account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

The test area results should look similar to the results showing in the image here. If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.



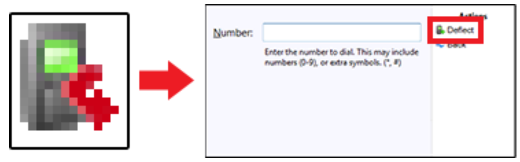
Functionality

When a call comes in, the CRM Connect 'Preview Window' will pop up and display the phone number that is calling. If the caller is recognized as one of your contacts from SuperOffice CRM, their details will also be displayed and you can 'pop' their SuperOffice CRM contact record by clicking the 'SuperOffice CRM' button in the window.



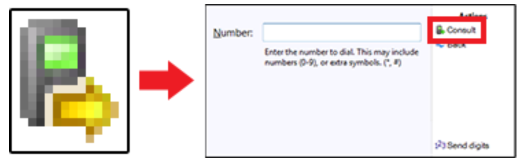
You can also pop recognized callers' SuperOffice CRM contact records by clicking the 'SuperOffice CRM' button on the 'Phone Window'.

Calls can be deflected to another extension before answering them by clicking the 'Deflect' button, entering the extension number into the 'Number' box and then clicking the 'Deflect' button next to it or pressing 'Enter'.



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 into the 'Number' box and then click the 'Consult' button next to it or press 'Enter'. The active call is automatically held. To end the call to your colleague and resume the held call, click 'Cancel'.



To transfer a call to another extension, click the 'Transfer' button, enter the extension number into the 'Number' box and then click the 'Transfer' button next to it or press 'Enter'.