



Customer Relationship
Management

CRM Phone Administrator Guide

Version 14.1

Notices

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Preface

For details, see the following topics:

- [About this documentation](#)
- [Notation conventions](#)
- [Aurea global support](#)

About this documentation

This guide is part of the documentation set for Aurea CRM.

Notation conventions

This document uses the following notation conventions:

Convention	Meaning
Fixed-width	<code>Fixed-width</code> font indicates code, path names, file names, environment variable names, parameter names, command names, machine names, URLs.
Bold Fixed-width	Bold Fixed-width font is used to indicate user input or to emphasize certain lines of code.
<i>Italic Fixed-width</i>	<i>Italic Fixed-width</i> font indicates a placeholder for which you must supply a value.
Bold Sans serif	Bold sans serif typeface indicates the names of graphic user interface elements such as dialog boxes, buttons, and fields.
<i>Italic serif</i>	In text, <i>italic serif</i> typeface indicates the first use of an important term. The term is defined in the glossary.
Underlined	Underlined text in command lines and parameter descriptions indicate that you only have to enter the underlined part of the command or parameter name. For example, if you use the <u>-LOGFILE</u> parameter in a command, you only need to enter -LOGF.
[]	Brackets enclose optional arguments.
{ a b c }	Braces enclose two or more items. You can specify only one of the enclosed items. Vertical bars represent OR separators. For example, you can specify a or b or c.

Convention	Meaning
...	Three consecutive periods indicate that you can repeat the immediately previous item. In code examples, they can be horizontal or vertical to indicate omissions.
Menu > Choice	An angle bracket between two menu items indicates that you should choose an item from a menu. For example, the notation File > > Exit means: "Open the File menu and choose Exit ."
>>	Links to related information in other chapters or documents are indicated using the >> symbol.

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please open a ticket on [Aurea Support Central](#). Preferably, search the articles on the [Aurea Knowledge Base](#) for solutions to your issues before opening a ticket.

Information about the support organization is available on Support Central. The product documentation is available at <https://help.aurea.com/crm/#>.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, [contact us](#) through our [website](#).

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About CRM.phone

CRM.phone for Aurea.CRM is a softphone solution for users of both Aurea.CRM win and Aurea.CRM web.

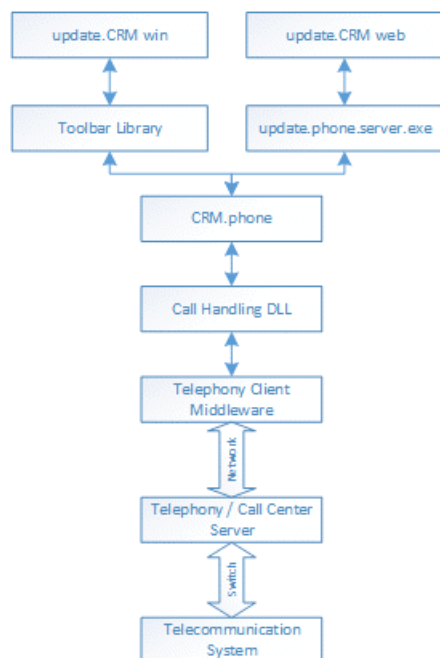
CRM.phone is not a standard Aurea.CRM component, and must be acquired separately. If you have installed CRM.phone, you need to configure the component in the Rights module.

As administrator, your tasks include:

- setting up CRM.phone's base configuration,
- defining telephone profiles and assigning these profiles to users,
- configuring system settings,
- configuring actions,
- defining tasks and conditions,
- and much more

General system architecture

The following diagram provides a general overview of the system architecture:



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Using CRM.Phone

Learn how to use CRM.Phone with Skype for Business and terminal servers.

CRM.Phone can easily be linked with Skype for business or a its single installation on server can be used by multiple users. CRM.Phone is available only for Enterprise customers.

Using CRM.phone with Skype for Business (Enterprise Feature)

CRM.phone is integrated with Lync or Skype for Business client as an underlying telecommunication system.

The following versions of Lync and Skype for Business client are supported:

- Microsoft Lync 2013
- Microsoft Skype for Business 2015
- Microsoft Skype for Business 2016

Aurea CRM enterprise customers can use CRM.phone to make and receive Skype for Business client calls. To make and receive Skype for Business client calls, CRM web users should have Skype for Business client installed and running on their local systems. Calls made by the user from the Skype for Business client or CRM.phone are automatically logged and synchronized in both the Skype for Business client and CRM.phone.

Note: In this document, the term “Skype for Business tool” refers to “Lync or Skype for Business client”.

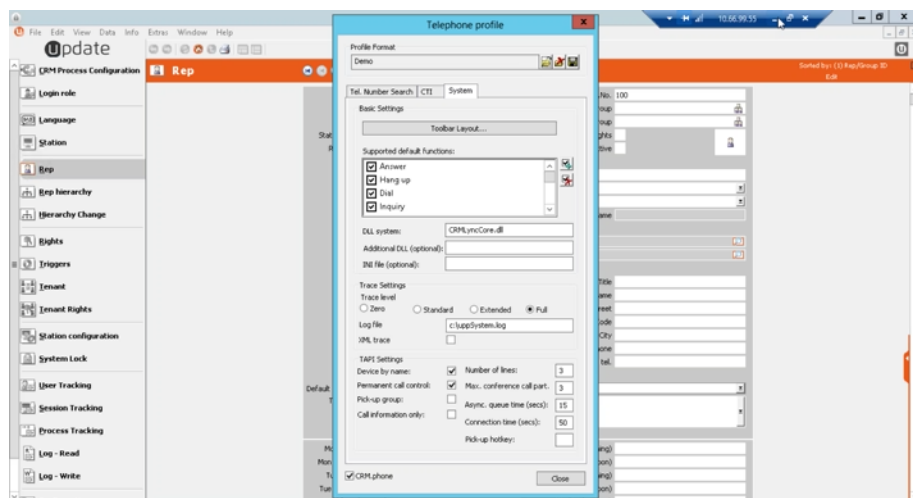
CRM.phone functions are common to all underlying communication systems like TAPI or Skype for Business tool. While this chapter describes some of the configuration requirements for Skype for Business tool, CRM.phone configuration descriptions provided in the rest of the guide are equally applicable to Skype for Business tool, as they are for TAPI.

Configuring CRM.phone to use Skype for Business Client

Learn to configure CRM.phone to use Skype for Business Client.

Configuring CRM.phone to use the Skype for Business client telecommunication system requires you to create a CRM.phone profile in the Rights Module.

The DLL file containing the interfaces that allows CRM.phone to communicate with the Skype for Business client is CRMLyncCore.dll. The DLL file name is provided in the **DLL System** field in the **System** tab of the **Telephone profile** configuration dialog. See the screenshot below:



You also have to enable the **Device by Name** and **Permanent Call control** fields under **TAPI Settings**, as seen in the screenshot above.

Once a CRM.phone profile for Skype for Business client is created, you can associate it with any user to enable him to use the Skype for Business client as the underlying telecommunication medium.

Note: The CRM user should have Skype for Business client installed on his local system.

For more information on creating a CRM.phone profile. For further details, see [Defining CRM.phone Profiles](#) on page 11.

Refer to the rest of this guide for information on configuring the CRM.phone to work with the underlying telecommunication systems like TAPI and Skype for Business client.

Using CRM.phone with Terminal Servers

You can operate CRM.phone in combination with Aurea.CRM web on a terminal server.

In this case, multiple users access the same installation of Aurea.CRM web and CRM.phone on the server.

This solution is also used on client installations if several users work on a computer, e.g. in call centers with multiple shifts.

Each user requires a unique CRM.phone-specific `.ini` and `.txt` files. When a user logs on to Aurea.CRM web for the first time, the following files are added to the directory containing `mmupdatephone.dll` with an appropriate suffix:

- `upPhone_<LoginName>.ini`
- `uppTapiExt_<LoginName>.ini`
- `uppHistory_<LoginName>.txt`
- `uppHotKeys_<LoginName>.txt`

Whereby `<LoginName>` is replaced with the user name in web.

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Managing CRM.Phone

Learn how to manage CRM.Phone to provide custom configuration to facilitate your voice communication needs.

Basic Settings for CRM.phone

. Learn how to perform basic settings for CRM Phone to get started with it.

Note: If you do not use CRM.phone, you still have to set the basic settings using the Telephone Profile option. You need these basic settings to search for phone numbers and e-mail addresses in Aurea.CRM.

The options used to configure CRM.phone are accessed from the Extras menu in the Rights module

To determine the basic settings:

1. Open the Rights module.
2. Select **Extras > Telephone Profile** from the menu.

The Telephone Profile dialog box opens.

3. You can enter the following information under Incoming Call and Outgoing Call:

Options	Description
International	The leading digits used for international calls. Country codes are standardized, e.g. Germany 49, United Kingdom 44, Austria 43. When dialing you must add a prefix to this country code. In Europe, a double zero is generally used; in Australia, '011' is used. Depending on the telephone system, you can enter the symbol + instead of the prefix of the corresponding country.
National	The leading digits used for national calls. In most countries, a leading zero is used.
External number prefix	The prefix required to call an external number. The prefix can include * or #.

Note: Whether you need to enter the External number prefix depends on whether your telephone system includes the external prefix with incoming calls. If an external prefix has been configured in your telephone system, the prefix is included with phone numbers and you need to enter the prefix here. If your system is not configured to use a prefix, leave this field blank. You must always enter the prefix for external calls.

4. Enter your country and area code and company number under Local Settings:

Options	Description
Country code	Your international country code.
Area code	Your area code.
Own company no.	Your local telephone number (without area or country code or extensions).

5. Use the settings under Search Algorithm Settings to determine how telephone numbers are searched for, >> Searching Using the Complete Number.

Options	Description
Truncated digits	The maximum number of digits that are removed from the end of the telephone number during the search.
Do not check hits for company number	Enable this option to terminate the search even if only a person number is found.

6. Click **Save**.

The Save dialog box opens.

7. Enter a name for the profile.

8. Click **Ok** then **Close**

Defining CRM.phone Profiles

Learn how to define CRM.phone Profiles.

In order for your users to use CRM.phone, you need to define profiles which can be assigned to individual users, groups or stations in the **Rights** module. Once CRM.phone has been installed, you can access the CRM.phone settings from the **Extras** menu in the **Rights** module.

Saving and Loading Telephone Profiles

To save a telephone profile:

1. Define a telephone profile. For further details, see [Enabling the Telephone Number Search](#), [CTI Settings](#), and [System Settings](#).

2. Click on  (**Save**).

The **Save** dialog opens.

3. Enter a name for the profile.
4. Click **OK**.
5. Click on **Close**.

To load a telephone profile:

1. Click on  (**Load**) next to the **Profile format** field. The **Load** dialog box opens.
2. Select a profile format from the list.
3. Confirm your selection with **OK**.

Enabling the Telephone Number Search

In order to search for telephone numbers in Aurea.CRM, you need to define certain options in the telephone profile.

To configure the search for telephone numbers:

1. Open the **Rights** module.
2. Select **Extras > Telephone Profile** from the menu.

The **Telephone Profile** dialog box opens.

Telephone profile

Profile Format

Tel. Number Search CTI System

Incoming Call

International: 00

National: 0

External call prefix: 0

Outgoing Call

International: 00

National: 0

External call prefix: 0

Local Settings

Country code: 43

Area code: 1

Own company no.: 87855

Search Algorithm Settings

Truncated digits: 0

☒ Do not check hits for company number

☒ CRM.phone

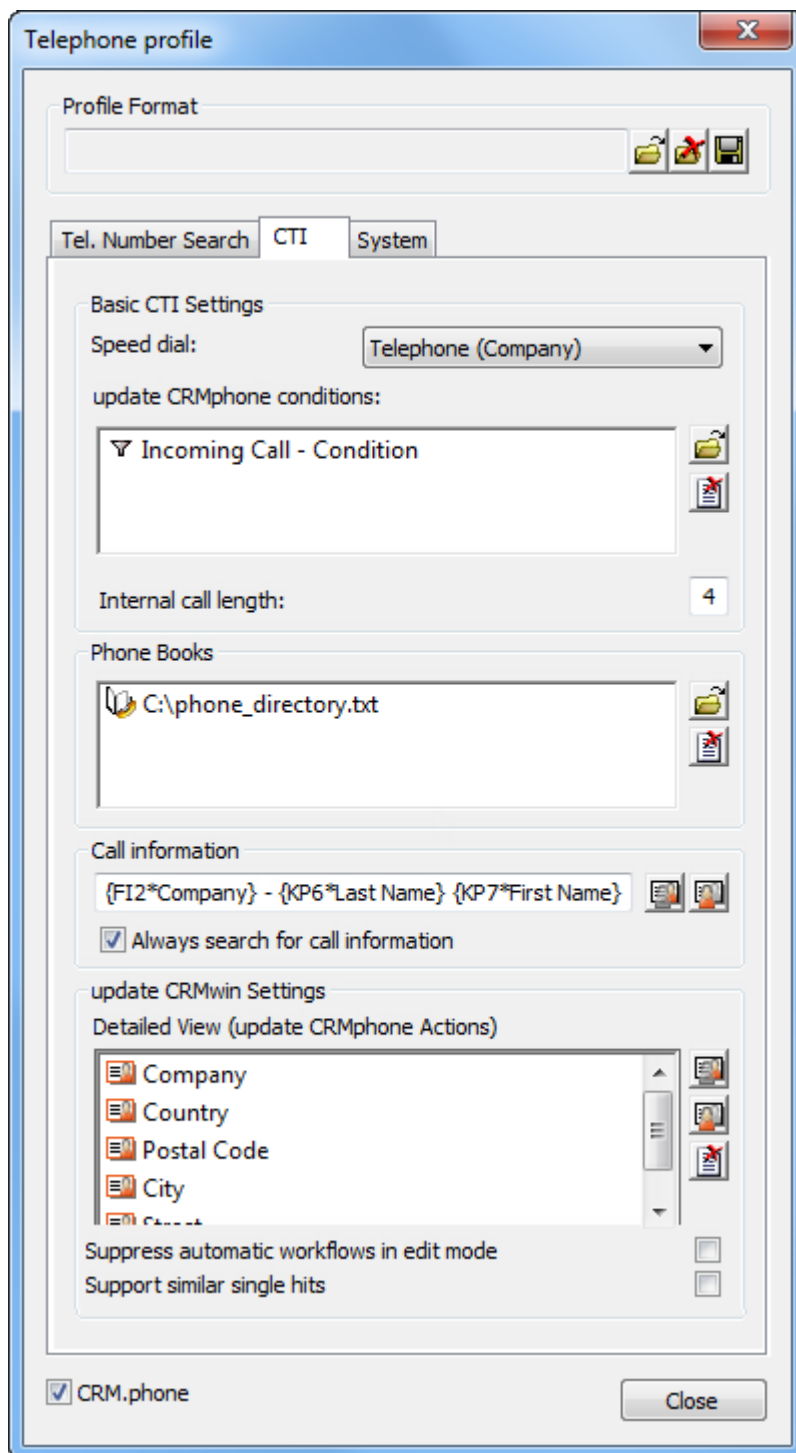
Close

3. Enter your company number, national and international prefixes etc. in the Tel. Number Search tab. For a description of the fields in this dialog. For further details, see [Basic Settings for CRM.phone](#).
4. You can define that a caller's telephone number is truncated by one digit and searched for again, if the caller's number cannot be found in the database. Use the **Truncated digits** option to define how often a digit is truncated and the search repeated.
5. The telephone number search displays all matching numbers of companies and/or persons. To include matching company records in the search results, ensure that the **Do not check hits for company number** option is disabled.
6. Enable the **CRM.phone** check box to display the CRM.phone toolbar in Aurea.CRM.

CTI Settings

To configure your basic CTI (Computer Telephony Integration) settings:

1. Open the **Rights** module.
2. Select **Extras > Telephone Profile** from the menu.
The **Telephone Profile** dialog box is displayed.
3. Switch to the **CTI** tab.



4. The following settings are defined in the **CTI** pane:

- **Speed Dial:** Use the drop-down list to select the number to be dialled using the quick dial function. Various numbers can be stored in the **Company** and **Person** info areas, for example the number of the company or mobile phone numbers or persons at the company. These numbers can be selected from here. The first number in this list is dialled when a user clicks on the **Speed dial** button in Aurea.CRM.
- **CRM.phone conditions:** You can determine the conditions that need to be met for CRM.phone to carry out actions. The conditions are tested in the order they

are entered. The condition associated with a task (via an action) is executed and any subsequent conditions are ignored. The order in which the conditions are defined is therefore important.

Example: You define 3 conditions. The first condition applies to all calls. The second condition filters calls from Germany and the associated action opens a survey tailored to customers in Germany. The third condition filters calls from the US and opens a survey tailored to US customers.

In this case, the first condition (applying to all calls) should not be placed first or second in the list, as it is met by all calls. This condition would be met by all calls and therefore the German and US calls would no longer be filtered.

The conditions added here need to be defined beforehand. For further details, see [Defining General Conditions](#) and [ACD Conditions](#).

Click on  (**Load**) to select a predefined event. The dialog box contains all defined events. Select the desired event from the list and click on **OK**.

Click on  (**Delete**) to remove a condition from the list.

- **Internal call length:** Enter the maximum length of numbers used for extensions or abbreviated dialling prefixes.

5. Use the **Phone Books** section to determine which directories are used by CRM.phone. Directories are text files and must contain entries in the following format:

<Name>;<Number>

e.g.:

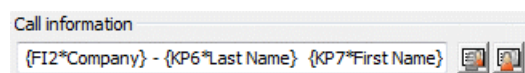
John Smith;3329392

6. Use the **Call information** field to specify the format used by call information in the call history (in Aurea.CRM win and Aurea.CRM web) and is displayed in the **CRM.phone Actions** dialog (in Aurea.CRM win).

Click on  (**Company Field**) to add a field from the **Company** info area. Click on  (**Person Field**) to add a field from the **Person** info area to the call information.

Note that you can only select one field at a time; to select multiple fields, repeat the selection process.

You can also enter plain text in this field (e.g. "Company:" followed by the company name):



Restrictions: You cannot use braces ({ and }) or semicolons in text entries.

7. Enable the **Always look for call information** option to always search for call data in the database (irrespective of any conditions and tasks).

Note: This option has no affect in Aurea.CRM web.

8. Use the **Detailed view (CRM.phone actions)** field in the **update.CRM win Settings** pane to specify which information is included in the detailed call information.

Click on  (**Company Field**) to add a field from the **Company** info area. Click on  (**Person Field**) to add a field from the **Person** info area. The contents of the field are output in the detailed call information. You can select multiple fields.

- **Suppress automatic workflows in edit mode:** Enable this check box to prevent automatic actions from starting when Aurea.CRM is in edit mode.
- **Display similar single hits:** If the telephone number search does not return an exact match, but only a single similar number that meets the search criteria, this similar number is treated as an exact match.

System Settings

You can configure CRM.phone to your requirements. For example, you can determine the data included in log files and the buttons displayed in Aurea.CRM.

To configure the system settings in the telephone profile:

1. Open the **Rights** module.
2. Select **Extras > Telephone Profile** from the menu.

The **Telephone Profile** dialog box is displayed.

3. Switch to the **System** tab.

Telephone profile

Profile Format

Tel. Number Search | CTI | **System**

Basic Settings

Toolbar Layout...

Supported default functions:

- ☒ Answer
- ☒ Hang up
- ☒ Dial
- ☒ Inquiry

DLL system: uppTapiExt.dll

Additional DLL (optional):

INI file (optional):

Trace Settings

Trace level

☒ Zero ☐ Standard ☐ Extended ☐ Full

Log file

XML trace ☐

TAPI Settings

Device by name: ☒ Number of lines: 3

Permanent call control: ☒ Max. conference call part. 3

Pick-up group: ☐ Async. queue time (secs): 15

Call information only: ☐ Connection time (secs): 50

Pick-up hotkey:

☒ CRM.phone

Close

4. Define your **Basic Settings**:

- Click on **Toolbar Layout** if you wish to edit the layout of the CRM.phone toolbar in Aurea.CRM win and Aurea.CRM web. For further details, see [Configuring the Toolbar Layout](#).
- Supported default functions**: Select the functions supported by your telecommunications system. These functions are accessible from the CRM.phone toolbar in Aurea.CRM or the **CRM.phone** dialog box.

The **Send record information** function can only be used if your telephone system supports the TAPI function `lineSetCallData`.

- **System DLL:** The DLL used by the system. The default file is `uppTapiExt.dll`.
- **Additional DLL (optional):** If you have created your own DLL containing your own functions (with the CRM.phone SDK), enter the name of the DLL in this field. The DLL is loaded when CRM.phone is started. If general controls have been defined, you must enter the name of the DLL used to define them here.
- **INI file (optional):** Additional settings that only apply to your telephony system can be written to an .ini file. This file must be stored in the `system/sys` directory. For further details, see [Optional ini File](#).

5. Determine the **Trace Settings**:

- **Trace level:** You can choose from Zero, Standard, Extended and Full.

Aurea recommends setting the trace level to **Zero**, as otherwise large volumes of data are written to the log files, which may impact on the performance of the system. Only enable the other options when troubleshooting.

- **Log file:** Enter the name of the log file here. Log files are saved to the file specified here (in each user's directory). Aurea.CRM suggests the file name `uppTrace.log`. If the trace level has been set to **None**, no log file is saved.
- **XML trace:** Enable this option to save the telephone profile in XML format in the file `uppProfile.xml` in the user's directory.

6. Determine the **TAPI Settings**:

- **Device by name:** A TAPI device identified by 3 components: the name, extension and a unique ID.

The TAPI system assigns a unique ID to each TAPI device. CRM.phone uses this ID by default to communicate with the extension. CRM.phone can also communicate with the device using the device name. Enable the Device by name option to communicate with the device using the device's name.

If the TAPI extension is assigned to users that use different workstations, these users need to select the correct extension using the ID each time. If the TAPI extension has the same name on all workstations, use the Device by name option to access the device using the device name and thus prevent having to manually specify the appropriate extension.

Defining General Control Elements

Learn how to define General Control Elements to use additional functionality.

The following types of controls are available:

- **General buttons:** Users can directly call a function using these buttons, e.g. a button that allows call center agents to carry out a private phone call.
- **Toggle buttons:** Users can turn a function on and off using these buttons, e.g. a button used by call center agents to indicate that they are taking a break, informing the system that they are unavailable to answer calls. Once the user clicks on the

button a second time (to disable the function), calls are again forwarded to the agent.

Different icons can be displayed depending on the buttons state, and the visual appearance (up or down) of the button also changes to reflect the state.

- Icon buttons: These are not true buttons, but are used to display icons that inform users, e.g. of the system's current state.
- Text elements: Text elements can be displayed in the CRM.phone toolbar, e.g. to inform call center agents how long a caller has waiting in the queue.

If you wish to use additional functionality that is not included in CRM.phone by default, these functionality must be programmed (contact your Aurea representative for information). The CRM.phone SDK is available for this purpose.

You can assign buttons to additional function or define text elements (to display text in CRM.phone) in the **CRM.phone General Controls** dialog. The individual icons and tooltips (for buttons), or texts (for text elements) need to be added to the **CRM.phone General Controls** dialog in the same order as in the DLL programmed using the SDK, >> CRM.phone SDK Technical Documentation.

You can assign multiple icons and tooltips (defined in the code) to a button, each corresponding to the possible states that a button can have (e.g. a button could be up or down, a function could be activated or disabled, etc.).

Note: Tooltips are not displayed for inactive buttons in the toolbar.

To define a new control element:

1. Start the **Rights** module.
2. Select **Extras > CRM.phone General Controls** from the menu.

The **CRM.phone General Controls** dialog is displayed.

3. Define the desired options:

- [Defining Buttons](#)
- [Defining Text Elements](#)

4. Save your custom elements as a format.

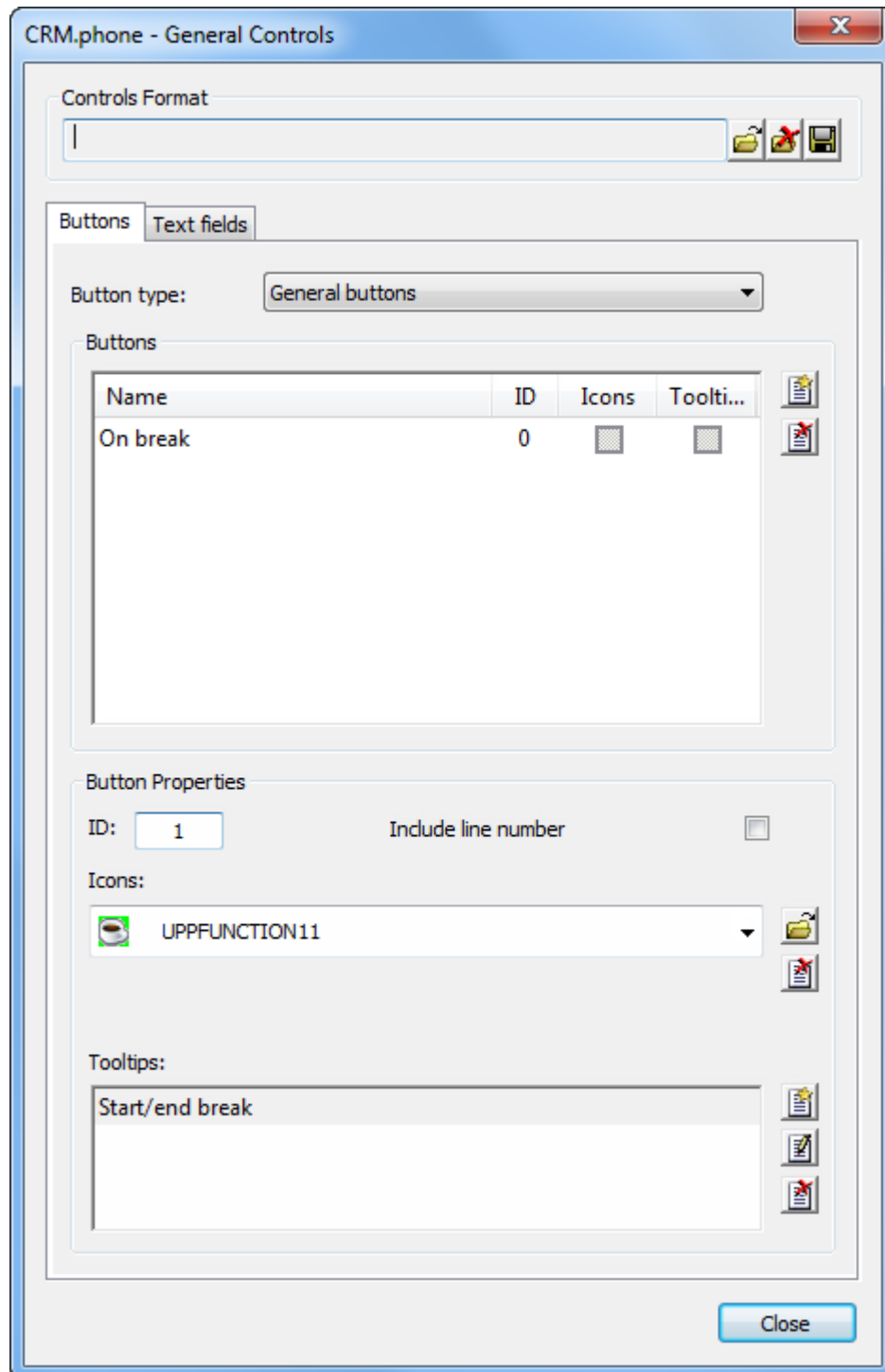
5. Click on **Close**.
-

Defining Buttons

You can define various button properties, e.g. the icons and tooltips displayed. You can define different icon buttons for each of the buttons possible states.

Note: The order in which you add the icons and tooltips must match the order in your DLL, see *CRM.phone SDK Technical Documentation*.

To define a button (in the following example, a toggle button):



1. Switch to the **Buttons** tab.
2. Select the **Button type**. For further details, see [Control Types](#).
3. Click on  (**New Button**) in the **Buttons** pane and enter the **Name** of the button. The name is displayed in the **CRM.phone Toolbar Layout** dialog. For further details, see [Configuring the Toolbar Layout](#).

The **Button Properties** pane is enabled.

4. Click on  (**New Icon**) in the **Button Properties** pane and select the icon to be displayed on the button. You can choose one of CRM.phone's default icons, or load your own bitmap image from file. If the icon you load from the file is larger than the default icon, the icon is cropped in Aurea.CRM web, i. e. only a part fitting the default icon's size is displayed.

Note: Any icons you add from a file are added to the format. Any subsequent changes to the local file are **not** automatically applied to the format. If you change the icon, you need to add the icon to the format again.

Also pay attention to the color displayed as transparent in CRM.phone. For further details, see [Transparent Button Icons](#).

You can assign several icons to a button. Which button is displayed at which time is determined by the DLL developed using the SDK.

All icons assigned to a button must be the same size.

5. Click on  (**New Tooltip**) in the **Tooltips** pane to enter a tooltip.

You can assign several tooltips to a button. Which tooltip is displayed at which time is determined by the DLL developed using the SDK.

6. Enter an **ID** for each button that matches the **ID** used in the DLL developed using the SDK.
7. If the function developed using the SDK requires the number of the current line, e.g. for the "Record Voice" function, enable the **Include line number** check box.

Transparent Button Icons

If you have added an image from a file to your format, always remember that the top-left pixel in the image is treated as transparent color. This color is therefore **not** displayed on the screen.

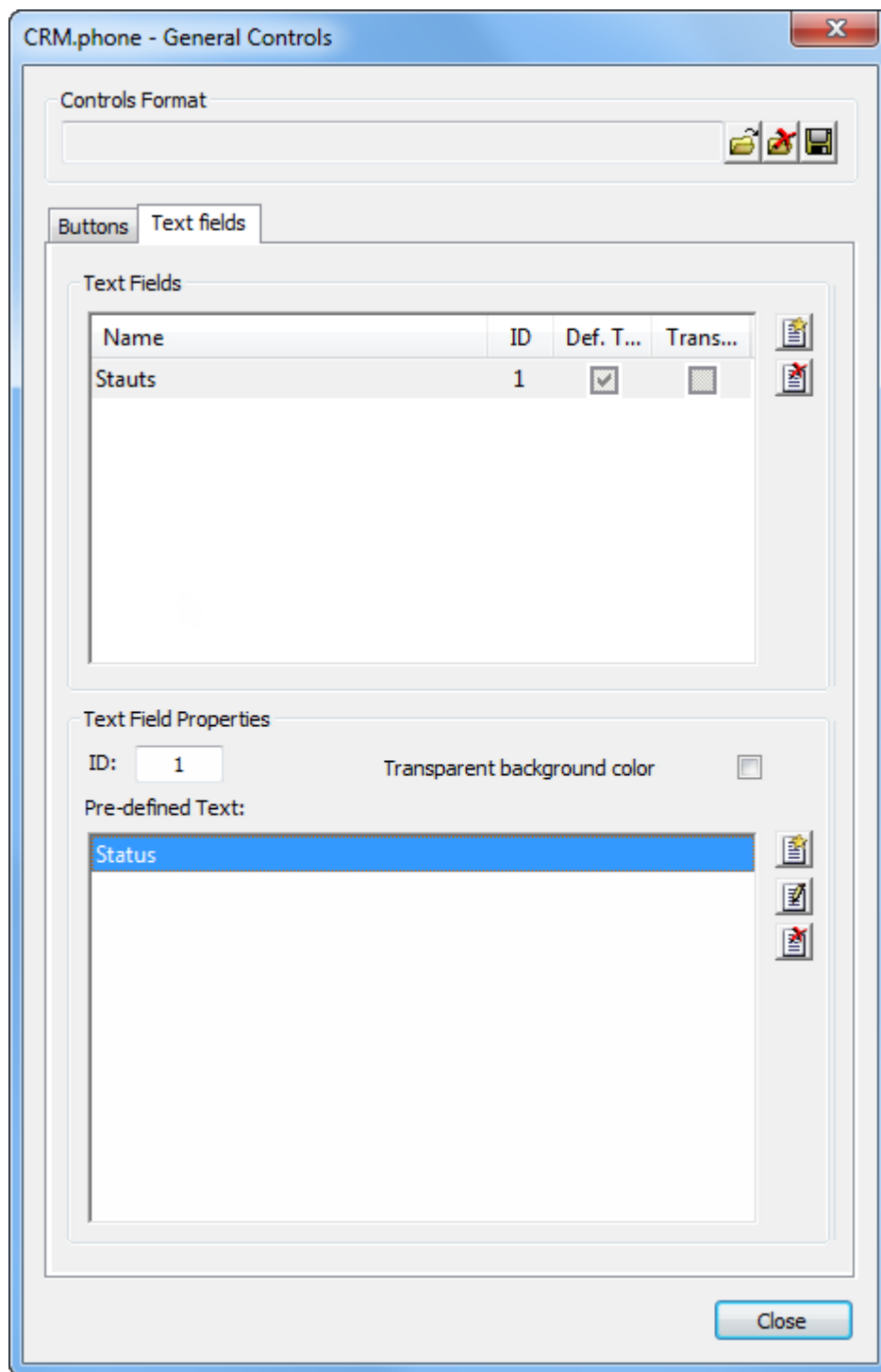
Ensure that this color is not used by the actual image itself, otherwise the image is not displayed correctly.

The default background color used by CRM.phone's default icons is bright green (RGB: 0, 255, 0). This color is only used for backgrounds in images, ensuring that the icons are displayed correctly.

Defining Text Elements

Note: The order in which you add predefined text fields must match the order in the DLL developed using the SDK, >> CRM.phone SDK Technical Documentation.

To define a text element:



1. Switch to the **Text fields** tab.
2. Click on  (**New Text Field**) in the **Text Fields** pane and enter a name. The name is displayed in the CRM.phone Toolbar Layout dialog. For further details, see [Configuring the Toolbar Layout](#).

The **Text Field Properties** pane is enabled.

3. Click on  (**New Text**) in the **Text Field Properties** pane to enter the desired text.

You can assign several predefined texts to a text field. Which field is displayed at which time is determined by the DLL developed using the SDK.

4. Enter an **ID** for each text field. The **ID** must match the ID in the DLL developed using the SDK.
5. Enable the **Transparent background color** check box to determine that the text field should be displayed with a transparent background.

Spacing Elements

If you wish to space elements in the toolbar, e.g. two buttons, you can do this using a text element.

Note: You can only use each text element once. You therefore need to define a new text element each time you wish to space elements.

To define a text element use to space elements:

1. Define an empty text field. For further details, see [Defining Text Elements](#).
 - Give the element a meaningful name, such as "Space1", to make it easy to identify.
 - Enable the **Transparent background color** option.
2. Define the width of the empty text field. For further details, see [Formatting Text Fields](#).
3. Add the text field to the toolbar at the desired position. For further details, see [Toolbar Layout](#).

Loading Controls Formats

If you have previously saved custom controls in a controls format, you can load the format, e.g. to edit it. You can add controls in the format to the CRM.phone toolbar. For further details, see [Toolbar Layout](#).

Note: These controls are **not** available in Aurea.CRM web.

To load a controls format:

1. Select **Extras > CRM.phone General Controls** from the menu.

The **CRM.phone General Controls** dialog is displayed.
2. Click on  (**Load**) under **Controls Format**.
3. Select the desired format and confirm with **OK**.

Configuring the Toolbar Layout

Learn how to configure the toolbar layout, icons and keyboard shortcuts.

You can change the font size, font style, width and alignment used by text fields. You can also assign your own icons to the standard functions in CRM.phone and can assign keyboard shortcuts to buttons.

You can define which controls (buttons, text fields etc.) are displayed in the toolbar. User-defined controls saved in a controls format can also be added to the toolbar. For further details, see [Defining General Control Elements](#).

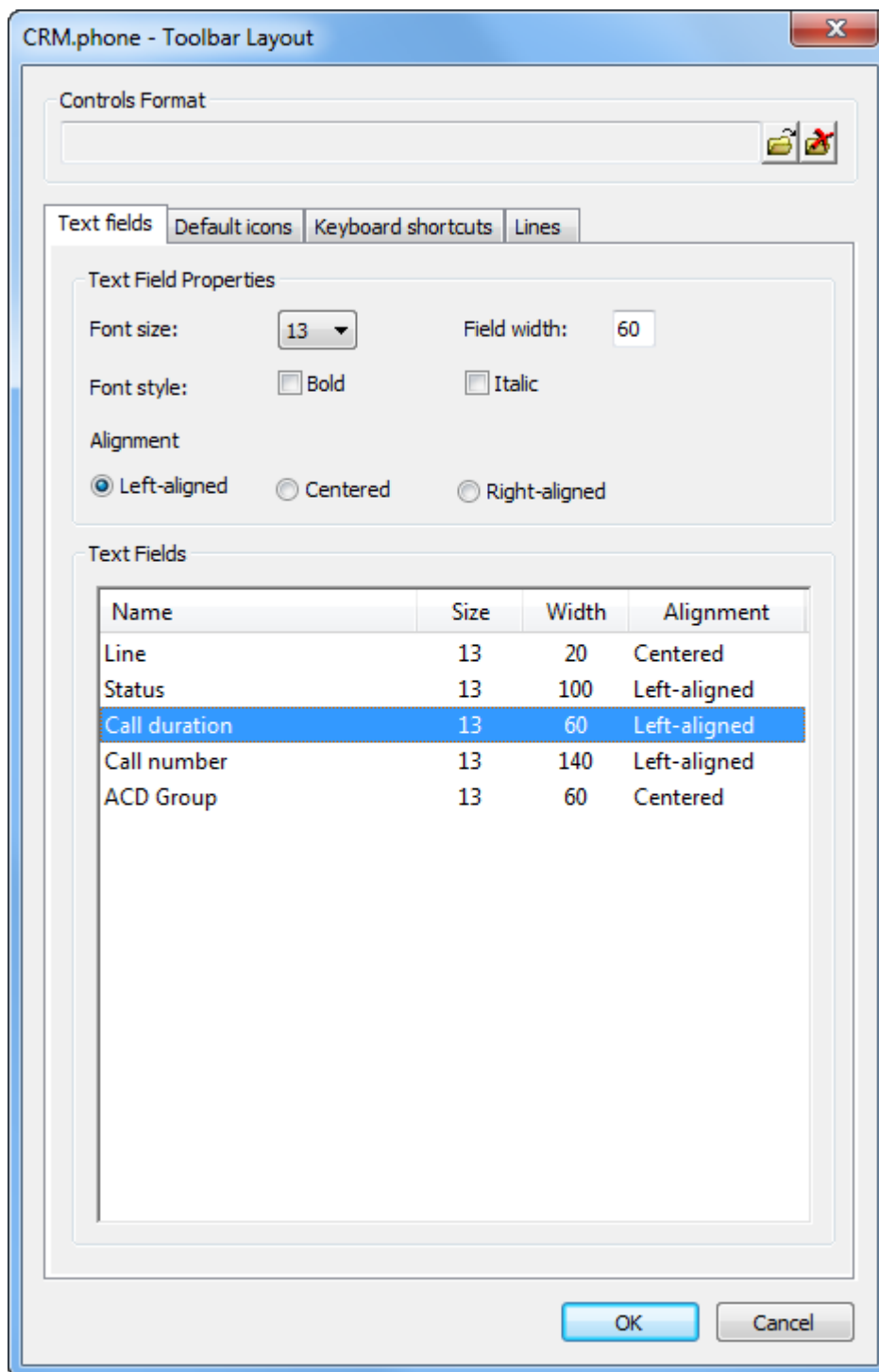
You can also determine the order in which elements in a row (text fields, buttons, separators) are displayed in the toolbar. You can choose to display the toolbar over two rows.

If the toolbar uses two rows, both rows are automatically set to the same height. The height is set according to the height of the largest element. For example, if one row contains a dual line text field, the second row is also adjusted according to the height of the dual line text field.

Formatting Text Fields

To format a text field:

1. Switch to the **Text Fields** tab in the **CRM.phone Toolbar Layout** dialog.



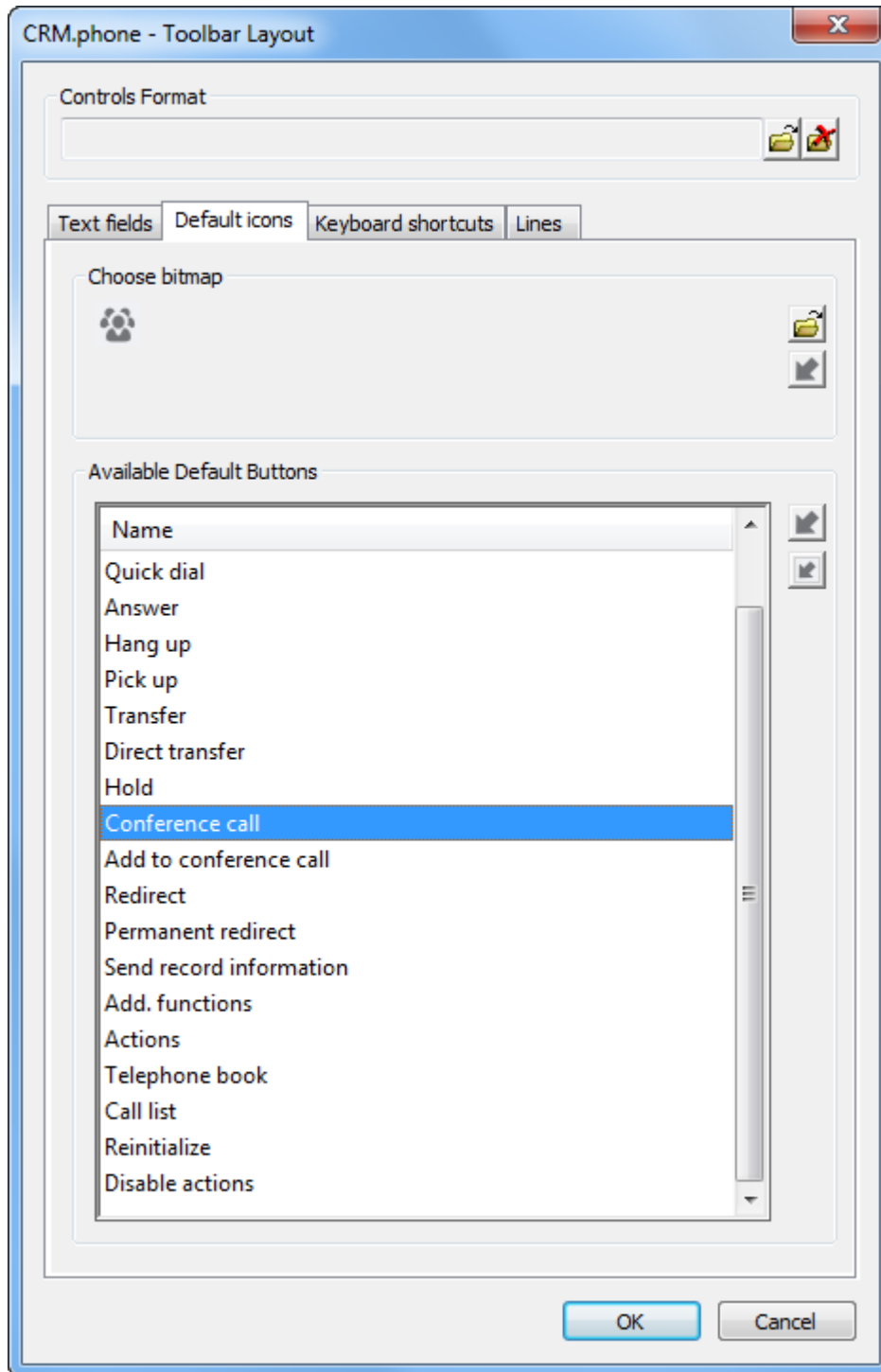
2. Select one of the fields listed under **Text Fields**.
3. Define the **Text Field Properties** for the selected field:
 - **Font size** (pt)
 - **Field width** (pixels)
 - **Font style**(Bold, Italic)
 - **Alignment** (Left-aligned, Centered, Right-aligned)

The selected text is displayed using the selected formatting in update.CRM.

Changing Icons used by Standard Functions

To assign an icon:

1. Switch to the **Default icons** tab in the **CRM.phone Toolbar Layout** dialog.



The **Available Default Buttons** are listed.

2. By default, three designs are available for the default buttons:

-  (**Default Layout web**)
-  (**Default Layout win**)

Click on the icon representing the desired design. If you edit these icons, the previously used icons are overwritten.

3. Select one of the **Available Default Buttons** from the list. The current icon is displayed under **Choose bitmap**.
4. To select a new icon, click on  (**Load Bitmap**) and select the icon to be used by the corresponding button. You can select a default icon available in CRM.phone or load your own icon from a file. Click on  (**Load**) next to the **Load from file** field to add a new icon from a file. If the icon you load from the file is larger than the default icon, the icon is cropped in update.CRM web, i. e. only a part fitting the default icon's size is displayed.

Note: Icons loaded from a file are added to the format. If you change the icon in the file itself, the change is not automatically applied to the format. To update the icon in the format, upload the icon again.

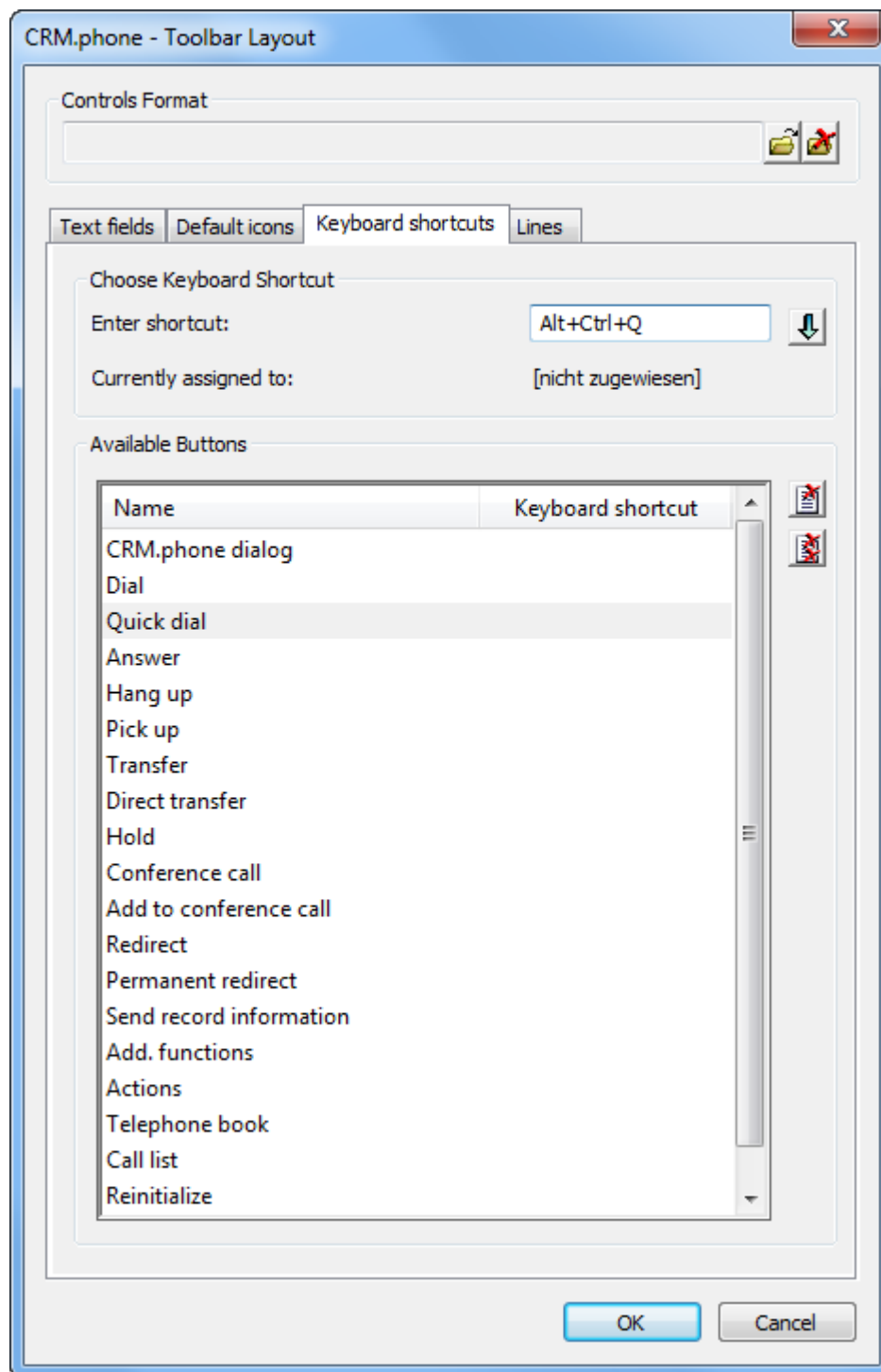
5. Click on  (**Default Bitmap**) to revert to the default CRM.phone icon.

Note: If you click on one of the design buttons in the **Available Default Buttons** ( (**Default Layout web**) or  (**Default Layout win**), the corresponding default icons are assigned to all functions listed.

Assigning Keyboard Shortcuts

To assign a keyboard shortcut:

1. Switch to the **Keyboard shortcuts** tab in the **CRM.phone Toolbar Layout** dialog.



2. Select the entry you want to assign a shortcut to from the list of **Available Buttons**.
3. Click in the **Enter shortcut** field.
4. Press the desired shortcut combination.

If the shortcut is already assigned, the entry the shortcut is assigned to is displayed next to **Currently assigned to** :.

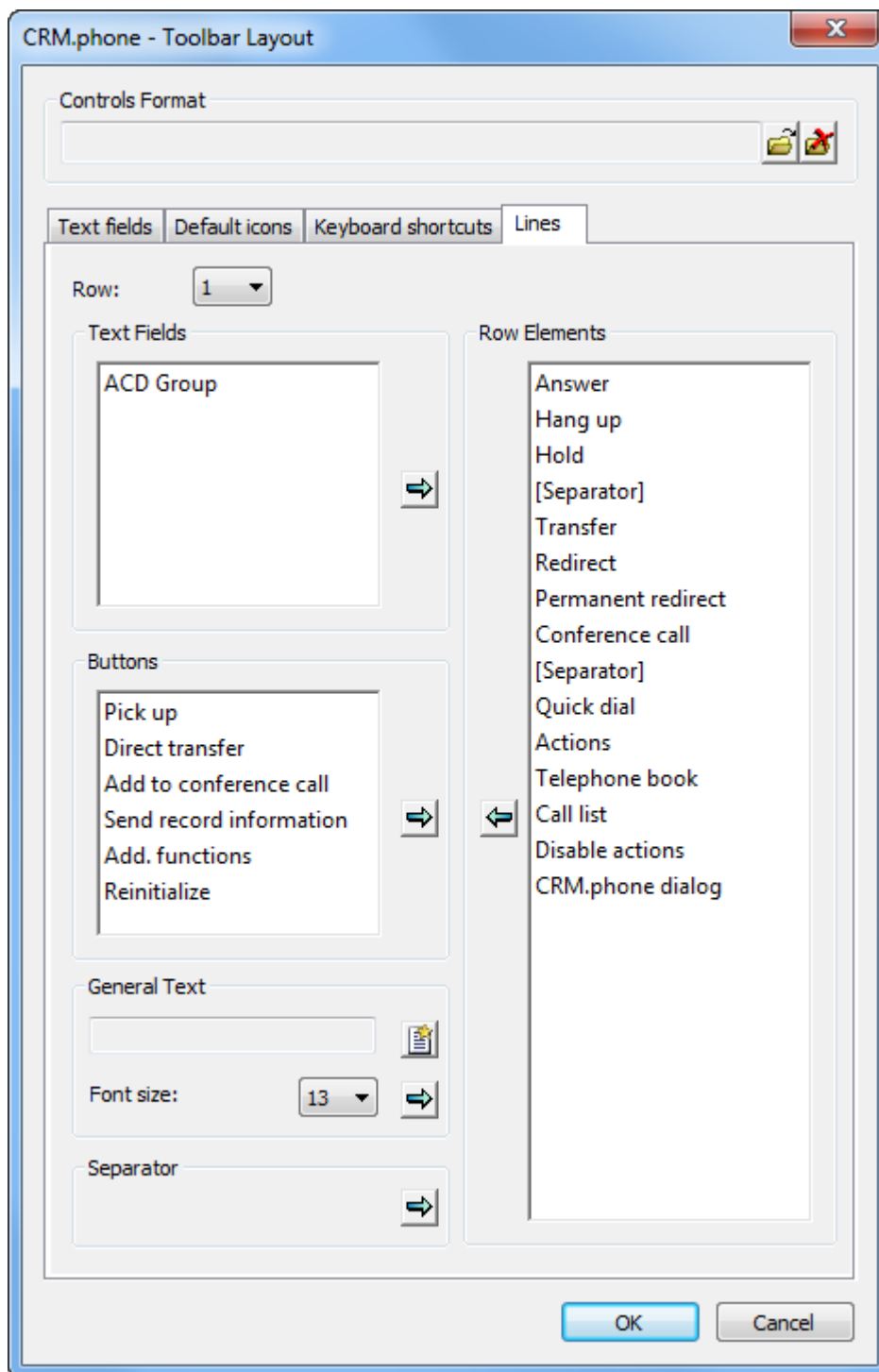
5. Click on  (**Assign Shortcut**) to assign the shortcut to the selected entry.
6. Click on  (**Delete Shortcut**) to delete the selected shortcut. Click on  (**Delete All Shortcuts**) to remove all assigned shortcuts.

Note: Users can define their own shortcuts in the Customize Keyboard dialog. If the same shortcut combination has been defined (for different functions) both here and in the Customize Keyboard dialog, the user-specific shortcut takes precedence (the settings defined in the telephone profile are ignored).

Configuring which Elements are Displayed

To add or remove elements to and from the toolbar:

1. Switch to the **Lines** tab in the **CRM.phone Toolbar Layout** dialog.



The elements assigned to the currently selected row are listed under **Row Elements**.

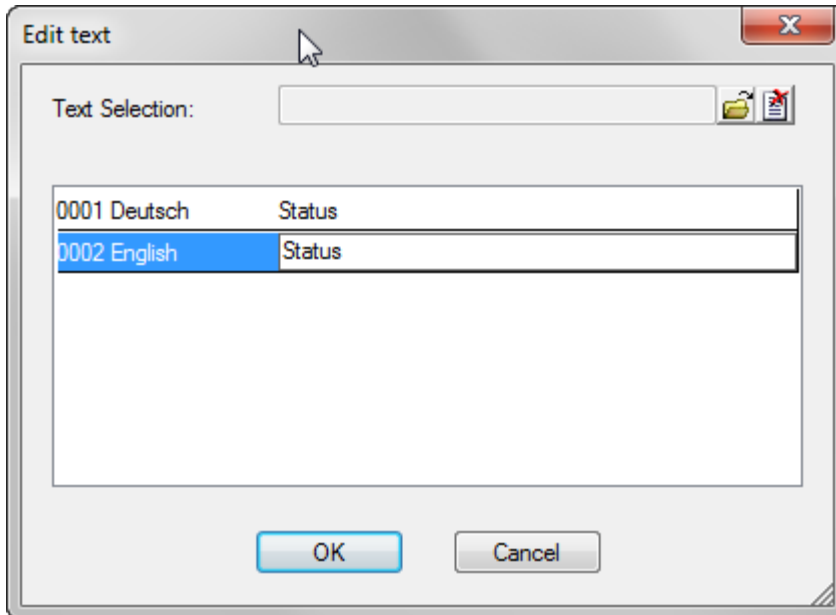
- If you want to add your own controls stored in a controls format, you need to load the format. For further details, see [Loading Controls Formats](#).

The available elements in the format are listed under **Text Fields** and **Buttons**.

- Select an element from the **Text Fields** or **Buttons** list, and click on  (**Add Text Field/Button**).

The element is added to the end of the **Row Elements** list. Drag it to the desired position. For further details, see [Configuring the Order of Elements in a Row](#).

4. To add specific text before a field (e.g. to display tips or describe a control element or group of elements):
 - a. Click on  (**New Text**) in the **General Text** pane.
 - b. Enter the desired text in the **Edit Text** dialog.



Note: You cannot only enter space characters (e.g. to space elements in the toolbar). To space elements, see [Spacing Elements](#).

- c. Click on **OK**.
 - d. Select the desired **Font size**.
5. If you want to add a separator to group similar items:
 - a. Click on  (**Add Separator**) under **Separator**.
 - b. Move the entry to the desired position. For further details, see [Configuring the Order of Elements in a Row](#).

A separator () is displayed in the toolbar at the defined position.

6. To remove a control element from the toolbar, select the desired entry and click on  (**Remove Element**).

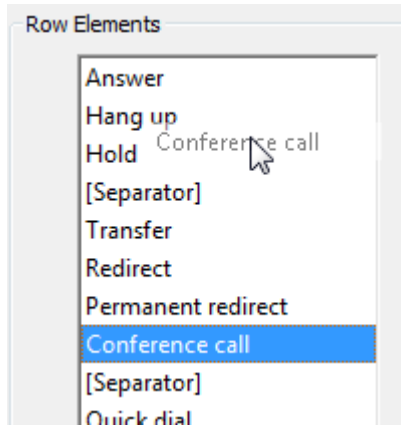
Elements that have been removed are listed under either **Text Fields** or **Buttons**, depending on the type of element.

Separators and text elements are simply deleted.

Configuring the Order of Elements in a Row

To change the order of elements:

Click on the entry you wish to move and drag it to the position of the entry that it should appear before in the toolbar.



The entry you are moving remains highlighted at its original position until you release the mouse button.

Displaying the Toolbar Using Two Rows

To display the toolbar over two rows:

1. Before you can assign controls to the second row, they need to be removed from the first row. Switch to **Row 1**, select the desired element and click on  (**Remove Element**). Depending on the type of element, it is moved to either the **Text Fields** or **Buttons** list.

Separators and general texts are removed.

2. If you want to add controls you have defined your self, you need to load the corresponding controls format. For further details, see [Loading Controls Formats](#).

The available elements in the format are listed under **Text Fields** and **Buttons**.

3. Select **Row 2**.

The **Row Elements** list is updated to reflect the elements in the second row. By default, the second row is empty.

4. Select the element you want to add to the second row in the **Text Fields** or **Buttons** list, and click on  (**Add Text Field/Button**).

The element is added to end of the list of **Row Elements**. Drag the element to the desired position. For further details, see [Configuring the Order of Elements in a Row](#).

You can add controls from a controls format, see [Loading Controls Formats](#).

Example

Example to demonstrates the configuration of a telephone profile.

The following example demonstrates the configuration of a telephone profile. The profile needs to be assigned to a user, before the user can use the profile in Aurea.CRM.

1. Add a task for Aurea.CRM win or enter a process for Aurea.CRM web.

Aurea.CRM win:

Add a phone task and enter "Load company" as its name. For further details, see [Configuring Tasks](#). Enable the following options in the corresponding tabs:

- No hits: Select "**Find company/person**" under **Automatic action**. This determines that the search is opened if no matching number is found in the database.
- Exact hit: Select "**Load company/person**" and "**New activity**" from the list of **Manual action**. Users can then determine whether a new activity is added or the **Company/Person** info area is opened. No automatic action is started.
- Multiple hits: No entries.

Determine the process that is started. For further details, see [Configuring Tasks](#):

- No hits: Enter **PhoneNoHits** in this tab's **Process** field. If no record is found, the user can decide to call the person or company search or add a new record.

- Exact hit: Enter **PhoneExpandRecord** in this tab's **Process** field.. The record is displayed in the mask view.
 - Multiple hits: No entry.
2. Add a condition called "Telephone ringing". For further details, see [Defining Conditions](#). Select "Ringing" as the **Call status** and load the previously defined task ("Load company").

The screenshot shows a dialog box titled "CRM.phone condition" with a close button (X) in the top right corner. The dialog is divided into two tabs: "General" and "ACD-specific". The "General" tab is currently selected. Inside the "General" tab, there are several sections:

- Condition format:** A text input field with icons for file operations (copy, paste, delete, save) to its right.
- Basic Settings:**
 - Call status:** A dropdown menu showing "Incoming call".
 - CRM,phone task:** A text input field with icons for file operations (copy, paste, delete, save) to its right.
- Telephone Number Filter:**
 - Number list:** Radio buttons for "Included" (selected) and "Not included".
 - A text input field for the number list.
 - ☐ Partial match
 - ☐ No internal calls
- Date Filter:**
 - ☐ Active
 - Start:** 24.09.2013 (with up/down arrows)
 - End:** 24.09.2013 (with up/down arrows)
- Time Filter:**
 - ☐ Active
 - Start:** 18:35:53 (with up/down arrows)
 - End:** 18:35:53 (with up/down arrows)

A "Close" button is located at the bottom right of the dialog.

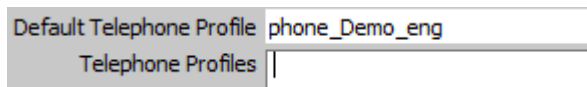
3. Add a telephone profile with the name "phone demo". For further details, see [Defining CRM.phone Profiles](#). Enable the previously defined condition ("Telephone ringing") in the **CRM.phone conditions** section on the **CTI** tab.

Determine the information displayed in the **CRM.phone Action** dialog box.

The screenshot shows the 'Telephone profile' dialog box with the 'CTI' tab selected. The dialog is titled 'Telephone profile' and has a close button (X) in the top right corner. It contains several sections for configuring CTI settings:

- Profile Format:** A text field with icons for file operations (add, delete, save) to its right.
- Tel. Number Search:** A tabbed interface with 'CTI' and 'System' tabs. The 'CTI' tab is active.
- Basic CTI Settings:**
 - Speed dial:** A dropdown menu currently showing 'Telephone (Company)'.
 - update CRMphone conditions:** A list box containing 'Incoming Call - Condition' with icons for file operations to its right.
 - Internal call length:** A numeric input field set to '4'.
- Phone Books:** A list box showing 'C:\phone_directory.txt' with file operation icons to its right.
- Call information:**
 - A text field containing the template '{F12*Company} - {KP6*Last Name} {KP7*First Name}' with icons for file operations to its right.
 - A checked checkbox labeled 'Always search for call information'.
- update CRMwin Settings:**
 - Detailed View (update CRMphone Actions):** A list box containing 'Company', 'Country', 'Postal Code', 'City', and 'Street' with file operation icons to its right.
 - Two unchecked checkboxes: 'Suppress automatic workflows in edit mode' and 'Support similar single hits'.
- CRM.phone:** A checked checkbox at the bottom left.
- Close:** A button at the bottom right.

- Assign the profile to a user, group or station.



- Start Aurea.CRM as the user you assigned the profile to.
- As soon as an incoming call is received, the status of the line is set to "Ringing".



Aurea.CRM win:

The system searches for similar numbers in the **Company/Person** info area. The **CRM.phone** dialog box displays information on the company or person as well as call information.

As no automatic action was defined in the case of an exact match, users need to select which of the two actions should be carried out; adding a new activity record or displaying the company/person.

Note: CRM.phone actions are only available for Aurea.CRM win.

Aurea.CRM web:

The **Company/Person** info areas is searched using the incoming number.

Configuring Tasks

A task is required in order to start an action. The task is allocated to an automatic action or one or more manual actions.

CRM.phone supports 3 default actions:

- Load company/person
- Add activity
- Company/person searchThe "Load company/person" and "Add activity" actions use the caller ID.

Note: Actions are not available in Aurea.CRM web. Instead you can use four default processes (PhoneNoHits, PhoneExpandRecord, PhoneNewAppointment, PhoneMultipleHits), see [Special Aurea.CRM web options](#).

To define a task:

1. Open the **Rights** module.
2. Select **Extras > CRM.phone task** from the menu. The **CRM.phone Task** dialog box opens.
3. You can determine which actions are carried out for a variety of scenarios in the corresponding tabs:
 - **No hits**: Use this tab to determine which action is triggered if Aurea.CRM finds no matching record.
 - **Single exact hit**: Use this tab to determine which action is carried out if an exact hit is found in the Aurea.CRM database.
 - **Other hits**: Use this tab to determine which action is triggered if several records are found in the Aurea.CRM database.

How similar numbers are handled depends on whether the Support similar single hits option is enabled in the telephone profile:

 - If Support similar single hits is enabled, the actions defined on the **Single exact hit** tab are executed if a single similar number is found.
 - If Support similar single hits is disabled, the actions defined on the **Other hits** tab are executed if a single similar number is found.
4. Enter a description of the task in the **Task information** field.
5. You can assign automatic and manual actions to the task in all three tabs.

Automatic actions carry out the associated workflow directly. The user needs to select a manual action from the **CRM.phone Action** dialog box.
6. Define the settings for Aurea.CRM web, see [Menu Actions instead of Actions in Tasks](#).
7. Save the task.

Note: The New Activity action is not available in the **Company** info area.

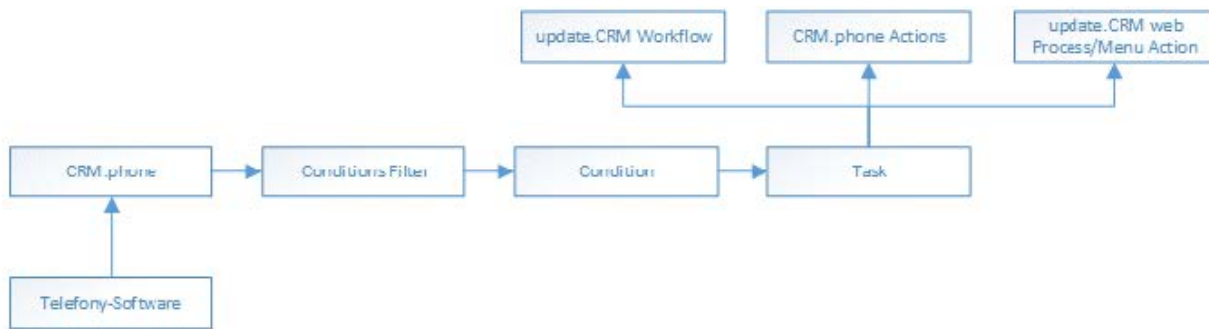
Triggering Actions

To trigger an action, you need to define a condition.

The condition is assigned to a task that in turn can be assigned to an automatic action or one or more manual actions. For further details, see [Defining Conditions](#) and [Configuring Tasks](#).

The telephony software sends call information to CRM.phone. If the data in the call information corresponds to a condition defined in CRM.phone, the data is passed to the CRM.phone task. This task searches the Aurea.CRM database for information in the **Company** and **Person** info areas. Depending on the number of results, an automatic action can be triggered or the CRM.phone Action dialog box can be displayed, allowing the user to select a manual option. For further details, see [Configuring Tasks](#).

The following diagram outlines the process of triggering actions:



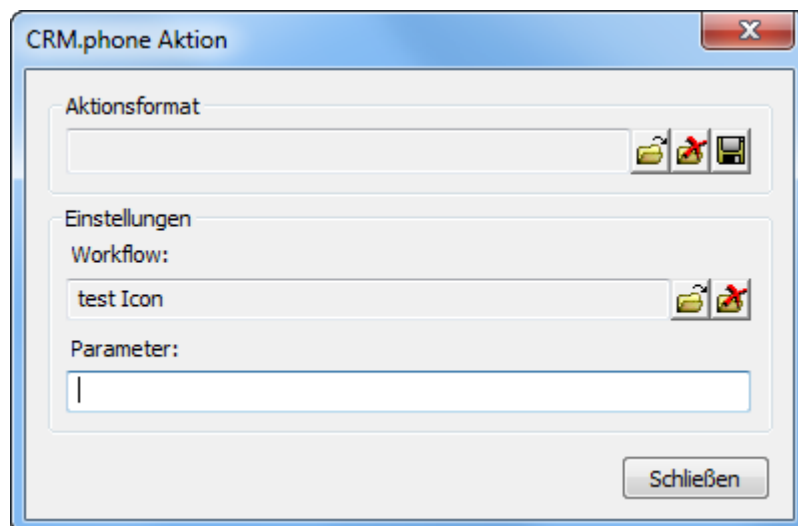
Note: Actions are not available in Aurea.CRM web.

Defining Actions

You can trigger workflows defined in Aurea.CRM using tasks and conditions in CRM.phone.

To assign a workflow:

1. Open the **Rights** module.
2. Select **Extras > CRM.phone action** from the menu. The **CRM.phone Action** dialog box opens.



3. Select the workflow and enter any parameters under **Settings**:

- **Workflow:** Select a workflow defined in Aurea.CRM using the  (**Load**) button. Select a workflow from the list and click on **OK**.
- **Parameters:** If the workflow requires parameters, you can enter them here.

4. Click on  (**Save**) and save the action under a meaningful name.

5. Click on **Close**.

Parameters for Aurea.CRM Workflows

You can define workflows in Aurea.CRM and trigger the workflows as actions in CRM.phone.

You can pass parameters from the **Company** and **Person** info areas to these workflows provided a record exists containing the corresponding telephone number.

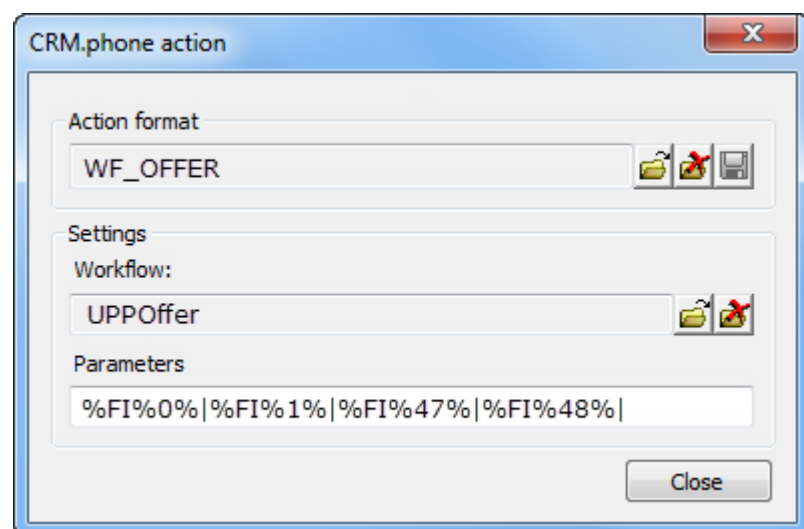
Use a pipe ("|") to separate parameters.

Example: The UPPOffer workflow has been defined in Aurea.CRM. This workflow adds a new offer for the caller during the course of an incoming call. The **Co.No .**, **Co.Gr .**, **Pe.No .** and **Pe.Grp .** fields are to be transferred as external parameters. The parameters are transferred when the workflow is initiated by CRM.phone.

Parameter definitions in the workflow:

No	Parameters	Source	Name	Type	Mand	Content	Variable	Sort	Max.
0	Data Field	External	cogr	String					
1	Data Field	External	cono	String					
2	Data Field	External	pegr	String					
3	Data Field	External	peno	String					

Define a corresponding action and select the UPPOffer workflow under Workflow. For further details, see [Defining Actions](#).



The dialog box titled "CRM.phone action" contains the following fields and controls:

- Action format:** A text field containing "WF_OFFER" with icons for Load, Save, and Close.
- Settings:**
 - Workflow:** A dropdown menu showing "UPPOffer" with Load and Close icons.
 - Parameters:** A text field containing the format string "%FI%0%|%FI%1%|%FI%47%|%FI%48%|".
- Close:** A button at the bottom right.

Enter the workflow parameters as follows:

```
%FI%0%|%FI%1%|%KP%47%|%KP%48%|
```

Note: The order in which parameters are specified must correspond to the order in which parameters are defined in the workflow.

FI and KP represent the **Company** (FI) and **Person** (KP) info area; the numbers represent the field numbers in the BTB version. Note that field numbers may differ in the OTC and FS versions.

Enter this action in the corresponding task, see [Configuring Tasks](#). When an incoming call is received, the corresponding person or company is searched for based on the telephone number. If the company or person is found, the **Co.No .**, **Co.Gr .**, **Pe.No .** and **Pe.Grp .** fields are transferred to the UPPOffer workflow as external parameters. These parameters can then be used to form keys in the workflow, in order to add an offer record for the appropriate company or person.

You can transfer the following additional parameters to workflows:

Telephone number:	%STR%WFPARAM_PHONENO%
Call data:	%STR% WFPARAM_CALLDATA%
Event name:	%STR%WFPARAM_EVENTNAME%
Phone task:	%STR%WFPARAM_TASKNAME%
Task info:	%STR%WFPARAM_REMARKS%
ACD:	%STR%WFPARAM_REDIRNO%
Complete phone number	%STR%WFPARAM_TELTABLENO%

Example: A workflow called `Testworkshop` was defined in Aurea.CRM. This workflow adds a ticket for the caller and includes details on the call in the ticket record (e.g. call data, forwarding number, or the entire telephone number of the caller). Parameters are transferred to this workflow.

The following parameters are defined in the workflow:

Parameters								
No.	Parameters	Source	Name	Type	Manda	Content	Variable	Sort
0	Data Field	External	phonennr	String				
1	Data Field	External	calldata	String				
2	Data Field	External	taskname	String				
3	Data Field	External	eventname	String				
4	Data Field	External	remark	String				
5	Data Field	External	cogr	String				
6	Data Field	External	cono	String				
7	Data Field	External	pegr	String				
8	Data Field	External	peno	String				
9	Data Field	External	redirno	String				
10	Data Field	External	fullnumber	String				

Enter the parameters as follows:

```
%STR%WFPARAM_PHONENO%| %STR%WFPARAM_CALldata%| %STR%WFPARAM_TASKNAME%
| %STR%WFPARAM_EVENTNAME%| %STR%WFPARAM_REMARKS%|
%FI%0%| %FI%1%| %KP%47%| %KP%48%| %STR%WFPARAM_REDIRNO%|
```

Defining Conditions

Learn to define and manage conditions.

The conditions used to trigger events for actions are defined, edited, enabled, disabled and deleted in the **CRM.phone Condition** dialog box.

To define a condition:

1. Open the **Rights** module.
2. Select **Extras > CRM.phone Condition** from the menu. The **CRM.phone Condition** dialog box opens.
3. Define your condition. For further details, see [Defining General Conditions](#) and [ACD Conditions](#).
4. Save the condition.

Defining General Conditions

To define a general condition:

1. Open the **CRM.phone Condition** dialog box. For further details, see [Defining Conditions](#).

CRM,phone condition

Condition format

General ACD-specific

Basic Settings

Call status Incoming call

CRM,phone task Load Company

Telephone Number Filter

Number list ☐ Included ☐ Not included

☐ Partial match

☐ No internal calls

Date Filter

☐ Active

Start: 24.09.2013 End: 24.09.2013

Time Filter

☐ Active

Start: 18:35:53 End: 18:35:53

Close

2. You can determine the following settings in the **General** tab:

- **Call status:** Each event is associated with a status, e.g. "Ringing". The entries in this list are fixed. Note that not all options may be supported by your telephone system.
- **CRM.phone task:** Select the task that is associated with the condition. All the tasks you have configured are available, see [Configuring Tasks](#). A condition can only be associated with a single task. However the task can be assigned to several conditions.

3. Enter the relevant data under **Telephone number filter**:

- **Number list:** You can enter telephone numbers or portions of telephone numbers separated by a comma.
- **Included:** The condition is met if the number is included in the list.
- **Not Included:** The condition is met if the number does not match a number in the list.

- **Partial match:** The condition is met if part of the number is included in the list of numbers. For example, if you enter "0044" in the list and enable **Partial match**, the condition applies to all UK numbers.
 - **No internal calls:** The condition only applies to external calls.
4. Your condition can also include date and time filters. Determine these settings under **Date filter** and **Time filter**. Enable the **Active** check box to use these settings.
- **Date:** If the condition should only be applied over a specific time period, enter the period's start and end date here.
 - **Time:** If the condition should only be applied over a specific time period, enter the period's start and end time here.

ACD Conditions

Learn about the Automatic Call Distribution conditions.

Conditions for ACD (Automatic Call Distribution) are usually needed in call center.

In order to define a condition for ACD:

1. Open the **CRM.phone Conditions** dialog box. For further details, see [Defining Conditions](#).
2. Switch to the **ACD-specific** tab.

CRM,phone condition

Condition format

General ACD-specific

Basic Settings

Call status Incoming call

CRM,phone task

Telephone Number Filter

Number list ☐ Included ☐ Not included

☐ Partial match

☐ No internal calls

Date Filter

☐ Active

Start: 24.09.2013 End: 24.09.2013

Time Filter

☐ Active

Start: 18:35:53 End: 18:35:53

Close

3. Select the desired option under **Call data availability**:

- No restrictions: Call data does not influence the event in any way.
- Do not accept data: The event is only valid if no call data is supplied.
- Data must be available: The event is only valid if call data is supplied.
- Replace telephone no. with call data: The telephone number is replaced with the call data when transferred to the CRM.phone task.

4. Select the desired options under Call data filter:

- Data list: Enter the desired call data, separated by commas.
- Included: The call data must be included in the list.
- Not included: The call data must not be included in the list.
- Separate the matching part: If the first part of the call data matches data in the list, this part of the call data is removed. Enable this check box if you wish to remove additional information that is not required for processing.

Example:

<Additional information><Customer number>

Order12345.

If "Order" is included in the list of call data, then only the number (12345) is used for further processing.

5. Configure the desired settings under **Automatic call distribution (ACD) availability**. Usually this concerns call center group numbers:

- No restrictions: Forwarding numbers do not affect the validity of the condition.
- Do not accept ACD numbers: The condition is only met if no forwarding number is included.
- ACD number must be available: The condition is only met if a forwarding number is included.
- Number list: Enter the numbers separated by commas.
- Included: The condition is only met if the forwarding number is included in the list.
- Not included: The condition is only met if the forwarding number is not in the list.

Displaying the ACD Number in the CRM.phone Toolbar

You can determine that the ACD number (the number of the call center forwarding the call) is displayed in the CRM.phone toolbar. To do so, you need to add a text field to the toolbar.

To display the ACD number in the toolbar:

1. Start the **Rights** module.
2. Select **Extras > Telephone Profile** from the menu.

The **Telephone profile** dialog is displayed.

3. Switch to the **System** tab.
4. Click on the **Toolbar Layout** button.

The **CRM.phone Toolbar Layout** dialog is displayed.

5. Switch to the **Lines** tab.
6. If your toolbar contains two rows, select the desired **Row**.
7. Select **ACD Group** from the **Text Fields** list and click on  (**Add Text Field**). The text field is added to the end of the **Row Elements** list.
8. Drag the entry to the desired position in the list. For further details, see [Configuring the Order of Elements in a Row](#).
9. Confirm with **OK**.

Assigning Telephone Profiles

Learn to assign the profiles to the users.

Once telephone profiles are defined, you need to assign the profile to the users. The profiles can be assigned to individual reps, groups or stations.

A profile assigned to a user takes precedence over profiles assigned to groups or stations. Group profiles take precedence over station profiles. In other words, the station profile is only used if neither a rep or group profile has been assigned to a rep.

You can assign further profiles in addition to the default profile.

To assign CRM.phone profiles to users and groups:

1. Open the **Rights** module.
2. Switch to the **Rep** info area.

Rep.: Andrea Marr

Rep/Grp. ID	000100005	Stat.No.	1
Rights Grp. ID		Rights Grp.	
Org. Grp. ID		Org. Grp.	
Access Right	☒	Grp.Acc.Right	☒
Rep.Acc.Right	☒	Inactive	☐
Type	Employee		
Name	Andrea Marr		
Access Right			
Desktop	skin		
Tenant No.	200	Tenant Name	Name 2
Sex	Mrs.	Title	Mag.
First N.	Andrea	Surname	Marr
E-mail 1		Street	
Country Prefix		Area Prefix	
Zip/PC	1040	City	Wien
Country	Österreich	Tel.1	123123123
Fax		Tel.2	
Default Telephone Profile	phone		
Telephone Profiles	phone		

3. Select the default telephone profile under **Default Telephone Profile**.
4. Select any additional profiles available to this rep or group under **Telephone Profiles**. Users can then select the desired profile when logging on to Aurea.CRM.
5. Save your changes.

Note: Telephone profiles are assigned to stations using the same fields in the **Station** info area.

Activating Telephone Profiles in Aurea.CRM web

Learn to activate telephone profiles in Aurea.CRM web.

You must add an entry to the `Settings.xml` file to allow a user who works with Aurea.CRM web to choose from a list of predefined telephone profiles.

To activate telephone profiles for Aurea.CRM web:

1. Open the `Settings.xml` in the subdirectory `System\Settings` of your [Aurea.CRM web installation](#) with a text editor.

2. Add the following lines to the `<Aurea.web>` section:

```
<update.web>
<!--CanChangePhoneProfile:
If true (default false) users can select from the phone profiles when signing
in to Aurea.CRM web.-->
<CanChangePhoneProfile>true</CanChangePhoneProfile>
...weitere Einträge...
</update.web>
```

3. Save the changes.

4. When a user logs in, he can choose a predefined telephone profile pressing the **More Options** button on the log-in screen.

Additional Telephone Fields in the Data Model

Additional telephone fields can be added to the data model.

For further details, see [Data Model](#) in the CRM.core Administrator Guide.

Telephone fields can be added to all info areas. These telephone fields also include a telephone icon and can be used to carry out calls in conjunction with CRM.phone.

Note: If the Search option is enabled in the data model (Telephone cell), additional telephone fields in the **Company** and **Person** info areas and their dependent info areas are transferred to the **Tel. No./E-mail** info area. These fields are available when searching for telephone numbers. Only additional fields in the **Company** and **Person** info areas can be used by the quick dial function.

Telephone Number Search

Users can search for telephone numbers in Aurea.CRM win and Aurea.CRM web.

If CRM.phone is installed, telephone numbers can be searched for automatically when an incoming call is received.

Telephone numbers of companies and persons are stored in a standardized and indexed format in the **Tel.No./E-mail** (TN) info area. The search always takes place in this info area.

Note: If not all telephone numbers, e. g. of the Person (PE) info area, were found, check how the Web Configuration parameters for CRM.phone were set in *CRM.designer*. For further details, see [Aurea CRM web Administrator Guide](#).

Determining the Complete Number for Incoming Calls

The logic described here is used:

- to determine the complete number of an incoming call in Aurea.CRM win
- in the telephone and e-mail search in Aurea.CRM web, if the **Original Number** check box is disabled.

The telephone number of an incoming call can have various formats. If the prefix used to indicate an external call is 0, the following types of numbers are possible:

- internal calls (100)
- calls from the same area (0123456)
- calls from a different area in the same country (00123456789)
- Calls from a different country (00044123456789)

The incoming number needs to be standardized in order to search in the Tel.No./E-mail info area. The following settings entered in the telephone profile are used for this purpose:

- **Local settings - Country code, Area code, Own company no.:** Used to determine the complete number.
- **Incoming call and Outgoing Call - International, National, External call prefix:** Information used to determine which leading digits are ignored.
- **Internal call length (CTI tab):** Determines the maximum length of internal extensions.

Example settings:

- **Country code:** 0043
- **Area code:** 01
- **Own company no.:** 87855
- **Internal call length:** 5

Using these settings, telephone numbers are transformed as follows:

- 100 > 43187855100 (3 digits are less than the **Internal call length** of 5)
- 0444444 > 431444444 (0 = **External call prefix**, replaced by the country and area codes)
- 00732333333 > 43732333333 (00 = **External call prefix** + **National**, replaced by the country code)
- 0004989222222 > 4989222222 (000 = **External call prefix** + **International**, and is removed)

Determining the Complete Number when Searching

The logic described here is used:

- when manually searching for telephone numbers in the company and person search in Aurea.CRM win.
- in Aurea.CRM web, if the **Original Number** check box is enabled.

Example settings:

- **Country code:** 0043
- **Area code:** 01
- **Own company no.:** 87855
- **International:** 00
- **National:** 0
- **External call prefix:** 0
- **Internal call length:** 5

In contrast to the method used to determine the number of an incoming call, no prefix is used for external numbers, to save users from needing to enter the prefix when searching manually. In addition to the values entered under **International**, the following prefixes are also used:

- International prefix: 00 or +
- National prefix: 0

Using the above the settings, the telephone numbers are transformed as follows:

100 > 43187855100

444444 > 431444444

0732333333 > 43732333333

004989222222 > 4989222222

Searching Using the Complete Number

Aurea.CRM carries out the following steps when searching:

1. Generate the complete number.
2. Search for one or more identical telephone numbers in the **Tel.No ./E-mail** info area (TN):
 - If the number is found in a company, the company is displayed.
 - If a the number is found in the **Tel 1**, **Tel 2** or **Mobile Tel.** fields of a contact person (CP), the contact person is displayed.
 - If for a contact person (PE) the number is found in the Private Tel. field, the system also searches for links to the **Contact Person** (CP) info area:
 - If the person is linked to at least one Contact Person (CP), all linked contact persons are displayed.
 - If the matching PE record is **not** linked, the PE record is displayed.

Note: Instead of the standard algorithm you can also set the **Display Person** configuration option to PE_NO_CP (if a PE record is found, no linked contact person (CP) records are displayed) or PE_With_CP (all linked contact persons (CP) and the PE record are displayed). You can define these options in the **Configuration** info area in the **Rights** module (**Telephone/E-Mail Search** category).

The search continues until a person record (PE or CP) is found.

If no person is found, the search continues with the following step.

3. The database is searched for telephone numbers starting with the given number. If matching numbers or numbers starting with the given numbers are found, the hits are listed. A number that was found in the previous step is not listed twice.

If no matching telephone number is found, the search continues with the following step.

Note: If you uncheck the **Do not check hits for company number** check box in the telephone profile, the hits must contain at least one company. If this option is enabled, only persons are listed as hits.

4. If no matching number is found, the last digit is truncated and the remaining number is searched for.

The search stops:

- When a matching telephone number is found.
- After a specified number of truncated digits (as defined in the telephone profile, by default 3), see [Basic Settings for CRM.phone](#).
- When the number has 6 digits left.

Examples

Here are some examples for your reference.

In the following examples the incoming number was already transformed into a complete telephone number. The matching number ending the search is formatted in bold.

12345* means all telephone numbers that start with 12345.

Example 1

Telephone profile settings:

- Truncated digits: 0
- Do not check hits for company number: enabled

The telephony system delivers the complete number, the telephone number is stored in Aurea.CRM without extension.

FI/KP	Name	Telephone Number
Company	Orlando & Bosl AG	Telephone: +43 (1) 444444
Person	LuiseOrlando-Bosl	Tel 1: +43 (1) 444444-10

Luise Orlando-Bosl calls, the telephone number is found:

Incoming number	Search for ...	... found
43144444410	43144444410	43144444410 (KP - Luise Orlando-Bösl in Orlando & Bösl AG)

A person that was not yet entered in Aurea.CRM calls. No matching number is found:

Incoming number	Search for ...	... found
43144444415	43144444415	---
	43144444415*	---

Example 2

Telephone profile settings:

- Truncated digits: 0
- Do not check hits for company number: disabled

FI/KP	Name	Telephone Number
Company	update software	Telephone: +43 (1) 87855-0
Person	Martin Meier	Tel 1: +43 (1) 87855-987
Person	Tito Test	Tel 1: +43 (1) 87855-925
Person	Lisa Lustig	Tel 1: +43 (1) 87855-913

A person from Aurea software calls. The telephony system does not transfer extensions, therefore, all persons of this company are found.

Incoming number	Search for ...	... found
43187855	43187855	43187855 (FI - update software)
	43187855*	43187855 (FI - update software) 43187855987 (KP - Martin Meier in Aurea software) 43187855925 (KP - Tito Test in Aurea software) 43187855913 (KP - Lisa Lustig in Aurea software)

Example 3

Telephone profile settings:

- Truncated digits: 3
- Do not check hits for company number: enabled

FI/KP	Name	Telephone Number
Company	Trochus Inc.	Telephone: +43 (1) 123456-0
Person	Paul Trochus	Tel 1: +43 (1) 123456-10
Person	Helene Trochus	Tel 1: +43 (1) 123456-20

A person of Trochus Inc. that does not exist in the database calls. After one digit is truncated, another person is found:

Incoming Number	Search for ...	... found
43112345625	43112345625	---
	43112345625*	---
	4311234562	43112345620 (KP - Helene Trochus in Trochus Inc.)

Example 4

Telephone profile settings:

- Truncated digits: 3
- Do not check hits for company number: disabled

FI/KP	Name	Telephone Number
Company	Trochus Inc.	Telephone: +43 (1) 123456-0
Person	Paul Trochus	Tel 1: +43 (1) 123456-10
Person	Helene Trochus	Tel 1: +43 (1) 123456-20

A person from Trochus Inc. that does not exist in the database calls. As the **Do not check hits for company number** option is unchecked, the search only stops after at least one company was found.

Incoming Number	Search for ...	... found
43112345625	43112345625	---
	43112345625*	---
	4311234562*	43112345620 (KP - Helene Trochus in Trochus Inc.)
	431123456*	431123456 (FI - Trochus Inc.) 43112345620 (KP - Helene Trochus in Trochus Inc.) 43112345610 (KP - Paul Trochus in Trochus Inc.)

Example 5

Telephone profile settings:

- Truncated digits: 3
- Do not check hits for company number: enabled

FI/KP	Name	Telephone Number
Company	Quicks Inc.	Telephone: +43 (1) 987654-0
Person	Sepp Schnellfuss	Tel 1: +43 (1) 987654-100

A person from a company with a similar telephone number call. The numbers of Quicks Inc. are also displayed.

Incoming Number	Search for ...	... found
431987654	431987653	---
	431987653*	---
	43198765*	431987654 (FI - Quicks Inc.) 431987654100 (KP - Sepp Schnellfuss in Quicks Inc.)

Example 6

Telephone profile settings:

- Truncated digits: 0
- Do not check hits for company number: enabled

In the previous examples the person was considered as hit in the "Person in Company (KP)" view. This view consists of two info areas: the child info area Contact Person (Cp) and the independent info area Person (PE).

The following example shows how telephone numbers are searched for if the number is stored in the Person (PE) info area.

FI/KP	Name	Telephone Number
Company	Weber AG	Telephone: +43 (1) 111111-0
Person (PE + CP)	Ingrid Weber	Tel 1: +43 (1) 111111-30 Private Tel: +43 (1) 222222
FI/KP	Name	Telephone Number
Company	Rock Inc.	Telefon: +43 (1) 333333-0
Person (PE + CP)	Ingrid Weber	Tel 1: +43 (1) 333333-10 Private Tel: +43 (1) 222222
PE	Name	Telephone Number
Person (PE)	Martin Weber	Private Tel: +43 (1) 222222

The Person (PE) Ingrid Weber is linked with two contact persons: one in the company Weber AG and another one in Rock Inc.

The Person (PE) Martin Weber is not linked with any contact person.

Ingrid Weber calls from Weber AG:

Incoming Number	Search for ...	... found
43111111130	43111111130	43111111130 (CP - Ingrid Weber in Weber AG)

Ingrid Weber calls from her private telephone number. For the Person (PE) Ingrid Weber all linked contact persons are displayed. Martin Weber is also displayed. As he is not linked with a Contact Person (CP), the person is displayed as a hit.

Incoming Number	Search for ...	... found
431222222	431222222	431222222 (CP - Ingrid Weber in Weber AG) 431222222 (CP - Ingrid Weber in Rock Inc.) 431222222 (PE -Martin Weber)

PE_NO_CP

If (in addition to Example 6) the **Display Person (PE/CP)** option was enabled for the **Telephone Number/E-mail Search** category in the **Configuration** info area (Rights Module) and the value given for this option is **PE_NO_CP**, the following hits are found:

Ingrid Weber calls from Weber AG:

Incoming Number	Search for ...	... found
43111111130	43111111130	43111111130 (CP - Ingrid Weber in Weber AG)

Ingrid Weber calls from her private telephone number. Due to the settings in the Configuration info area, only the hit in the Person (PE) info area is displayed.

Incoming Number	Search for ...	... found
431222222	431222222	431222222 (PE - Ingrid Weber) 431222222 (PE -Martin Weber)

PE_WITH_CP

If (in addition to Example 6) the **Display Person (PE/CP)** option was enabled for the **Telephone Number/E-mail Search** category in the **Configuration** info area (Rights Module) and the value given for this option is **PE_WITH_CP**, the following hits are found:

Ingrid Weber calls from Weber AG:

Incoming Number	Search for ...	... found
43111111130	43111111130	43111111130 (CP - Ingrid Weber in Weber AG)

Ingrid Weber calls from her private telephone number. Due to the settings in the Configuration info area, not only the hits in the linked Contact Persons (CP) but also the Persons (PE) are listed.

Incoming Number	Search for ...	... found
431222222	431222222	431222222 (PE - Ingrid Weber) 431222222 (CP - Ingrid Weber in Weber AG) 431222222 (CP - Ingrid Weber in Rock Inc.) 431222222 (PE - Martin Weber)

4

Special Features

Explore additional special features and functions in CRM.Phone.

The following topics are important if you use CRM.phone in combination with Aurea.CRM web:

Menu Actions instead of Actions in Tasks

Actions are not supported in Aurea.CRM web. Instead you can assign processes and menu actions.

For further details, see [Aurea.CRM web Administrator Guide](#).

Four default processes are available:

- PhoneNoHits
- PhoneExpandRecord
- PhoneNewAppointment
- PhoneMultipleHits.

To edit the Aurea.CRM web settings:

1. Open the **Rights** module.
2. Select **Extras > CRM.phone Task** from the menu.
3. Enter the name of the process in the Process field under Aurea.CRM web Settings. The following processes can be entered:
 - **No Hits:** Enter **PhoneNoHits** in the **No hits** tab. If no record is found, the user can decide to start the person or company search or add a new record.
 - **Exact hit:** Enter **PhoneExpandRecord** or **PhoneNewAppointment** in the **Exact hit** tab. The **PhoneExpandRecord** process displays the record found in mask view. The **PhoneNewAppointment** process opens the tab view in order to add a new activity record for the record.
 - **Multiple hits:** Enter **PhoneMultipleHits** in the **Multiple** hits tab. The records returned are listed, and the user can select the desired record from the list.
4. If instead of a process you want to use a menu action, enter its name into the **Menu Action** field. You can also use Menu Action parameters
5. Enter the menu action that should be called instead of a process in the **Menu Action** field. You can also transfer parameters (e. g. the telephone number generated by the telephony system). For further details, see [Transferring Parameters to Aurea.CRM web](#).
6. Save the task.

Transferring Parameters to Aurea.CRM web

You can hand over the following parameters to the telephone system.

- `$. call.callingNumber`: The telephone number of the current event, e. g. the caller's number or the dialled number.
- `$. call.redirectingID`: The ACD number.
- `$. call.callData`: The call data.
- `$. call.flags`: This parameter is not handed over from the telephony system. It defines a condition's position (starting with "0") within a list of defined conditions defined for the current telephone profile. Example: If two conditions were defined for a call status, e.g. "Ringing", you can use this parameter to define which condition is applied.

These parameters can be used with every Menu Action defined in CRM.designer. It defines a conditions position within a list

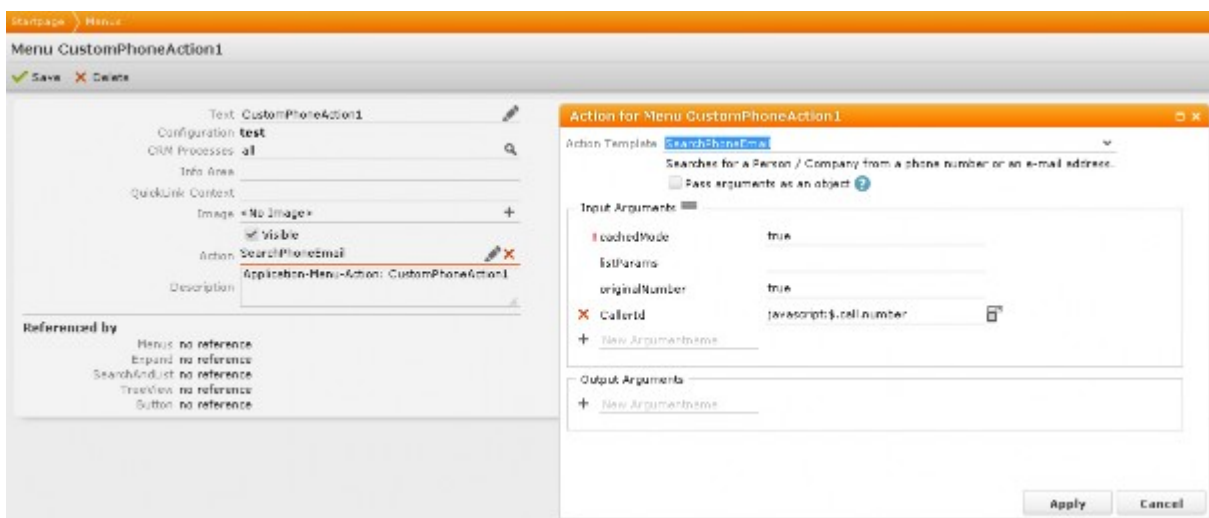
Syntax example: `" javascript :$ . call.CallingNumber "`

Example: Handing over call data as a parameter to the Search

A Menu Action starts the Telephone & E-Mail search and hands over the call data as a Search parameter.

1. Define an application menu action with the following parameters in CRM.designer (called **CustomPhoneAction1** in the following graphic):

- **Template Action** = SearchPhoneEmail
- **CallerId** = `javascript :$. call.number`



2. Define a task and assign the **Menu Action**.

No hits Single exact hit Other hits

update CRMwin Settings

Task information:

Automatic action:

☐ Load company/person

☐ New Activity

☐ Find company/person

Manual action:

☐ Load company/person

☐ New Activity

☐ Find company/person

update CRMweb Settings for the Same Session

☐ Process:

☒ Menu Action: CustomPhoneAction1

- Assign this task to a condition and this condition to a telephone profile.

If a CRM.phone condition applies you can add any child record to a single exact hit using the ExpandNew menu action.

For this purpose, the link = Record parameter must be defined in the Input Arguments section of the menu action.

Action for Menu CustomPhoneTicket

Action Template ExpandNew

Creates a new record in expanded view.

☐ Pass arguments as an object ?

Input Arguments

expandName	KM	▼
!infoAreaId	KM	▼
link	Record	▼

Example: Add a new record if a CRM.phone condition applies

A menu action add a ticket for a company or person that was found in the database. In addition, the call data is written to the **Problem Description** field (field no. 62 / BTB).

1. Define an application menu action with the following parameters in CRM.designer (called **CustomPhoneTicket** in the following graphic):

- **Template Action** = ExpandNew
- **CallerId** = javascript :\$. call.number

The screenshot displays the CRM.designer interface for configuring a menu action. The main window is titled 'Menu 'CustomPhoneTicket'' and includes 'Save' and 'Delete' buttons. The configuration is divided into several sections:

- Text:** CustomPhoneActionTicket
- Configuration:** test
- CRM Processes:** all
- Info Area:** (empty)
- QuickLink Context:** (empty)
- Image:** <No Image>
- Visible:** ☒
- Action:** ExpandNew
- Description:** Application-Menu-Action: CustomPhoneAction2

Below the configuration fields, a 'Referenced by' section lists various UI elements and their reference status:

Element	Reference Status
Menus	no reference
Expand	no reference
SearchAndList	no reference
TreeView	no reference
Button	no reference

On the right side, a panel titled 'Action for Menu CustomPhoneTicket' provides further details:

- Action Template:** ExpandNew
- Description:** Creates a new record in expanded view.
- Pass arguments as an object:** ☐
- Input Arguments:**

Argument Name	Value
expandName	KM
infoAreaId	KM
link	Record
defaultFields	62
defaultValues	javascript:\$.call.callData
- Output Arguments:** (empty)

2. Define a task and assign the **Menu Action**:

The screenshot shows a configuration window with two tabs: 'No hits', 'Single exact hit', and 'Other hits'. The 'Single exact hit' tab is selected. The window contains two main sections:

- update CRMwin Settings**:
 - Task information:** A text input field.
 - Automatic action:** A list of actions with checkboxes:
 - ☐ Load company/person
 - ☐ New Activity
 - ☐ Find company/person
 - Manual action:** A list of actions with checkboxes:
 - ☐ Load company/person
 - ☐ New Activity
 - ☐ Find company/person
- update CRMweb Settings for the Same Session**:
 - Process:** A radio button and an empty text input field.
 - Menu Action:** A radio button (selected) and a text input field containing 'CustomPhoneTicket'.

3. Assign this task to a condition and this condition to a telephone profile.

Web Configuration Parameters

If you want to use CRM.phone in combination with Aurea.CRM web you must also define configuration parameters in CRM.designer.

These parameters are described in the [phone Parameters](#) topic of the CRM.Web Administrator Guide.

Tel-/E-Mail Search

Check whether the `PE.EmailPhone` value exists for in the **Phone.EmailSearchList-Groups** special field group in CRM.designer. If this value does not exist, records in the Person (PE) info area are **not** listed in the search result. For further details, see [Phone.EmailSearchListGroups](#) in the Aurea.CRM Web Administrator Guide.

Automatically Updating CRM.phone in Aurea.CRM web

If you use CRM.phone with Aurea.CRM web, you can determine that new CRM.phone version are distributed automatically by the server to clients.

As CRM.phone needs to be installed locally on each Aurea.CRM web client, distributing the installer automatically simplifies the task of keeping all installations up to date.

CRM.phone must be installed on the server (using `updateCRMphoneforCRMweb_<Release>_fullinstallation.msi`) before you can distribute updates automatically. For details on installing CRM.phone, >> CRM.phone Installation Guide.

During the installation of CRM.phone, the file system is updated as follows:

- The `Setups` directory is added, including the `CRM.phone` subdirectory. This directory contains the installer that needs to be distributed to clients.
- The `IIS_USRS` group is assigned `Read&Execute` access rights required to this directory. If Aurea.CRM web is not running under the user `CRM.phone` is installed for, or the download is located on a different compute, ensure that the `IIS_USRS` group is assigned `Read&Execute` access rights to the directory containing the installers.
- `update CRMphone.manifest.xml` is stored in the `update.CRM web root` directory or one of its subdirectories.

This file contains the following information:

- `<version>`: The installer's version number
- `<url>`: The URL of the download. This URL can also be defined as a path relative to the location of `update CRMphone.manifest.xml` (as in the example).
- `<description>`: Short description of the download package

Example:

```
<package>
  <version>8.0.240.55963</version>
  <url> updateCRMphoneforCRMweb_8.0.240.55963_fullinstallation.msi</url>
  <description>This is an upgrade for Aurea CRMphone</description>
</package>
```

To activate automatic updates:

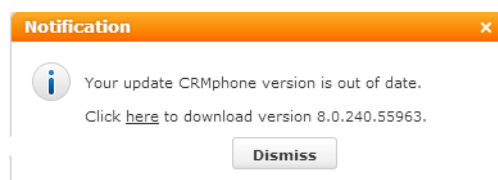
1. Download and install the CRM.phone hotfix on the server.
2. Enter the path to the installers in the `../web/system/settings/settings.xml` file of your Aurea.CRM web installation. By default the installer is located in the `Setups` directory of the CRM.phone installation.

Example:

```
<update.server>
  <AutoUpdate>
    <SourceDirectory Path="C:\Program Files\update CRM\update CRMweb
BTB\Setups"/>
  </AutoUpdate>
</update.server>
```

Note: You can also enter a path relative the Aurea.CRM web directory, e.g.: `<SourceDirectory Path=" .. \Setups"/>`

Each time a user logs on to Aurea.CRM web on a PC where CRM.phone is installed, the currently installed version of CRM.phone is compared to the version number in `update CRMphone.manifest.xml`. If the version installed has a lower version number, the user is informed that a more recent version is available for download.



The user can download the file and then execute the installer.

In order to use the new version, the user needs to close all browser windows and log on to Aurea.CRM web again.

ini Files

Learn how to configure additional options in ini files.

You can configure following additional options in ini files:

Optional ini File

Additional settings that do not conform to TAPI standards can be configured in a separate ini file. Define in the **INI file (optional)** field on the **System** tab in the **Telephone profile** window, where this file can be found:

- If you only enter the file name (e. g. `optional.ini`), the file is searched in the following default directories:
 - For Aurea.CRM win: in the `system/sys` directory.
 - For Aurea.CRM web: in the `CRM.phone` installation directory.
- If you enter the file name including a path (can also be a network path), the ini file is searched in this directory. Users must have sufficient access rights to read the file.

The following parameters are supported:

User-specific data

Sie können bestimmen, ob die benutzer-spezifische Dateien im Bereich % AppData % oder im Installationsverzeichnis von phone gespeichert werden:

You can define that user-specific files are stored in the % AppData % area instead of the `CRM.phone` installation directory.

```
[USER_SETTINGS]
```

```
Use User Folder = 1
```

Possible values:

- 0: User-specific files are stored in the `CRM.phone` installation directory, users must have the required write access assigned.
- 1 (default): User-specific files are stored under `%APPDATA%\update\Phone\`.

Example: `C:\Users\{username}\AppData\Roaming\update\Phone\`

This setting applies to:

- `uppHistory_[LOGIN].txt`
- `upPhone_[LOGIN].ini`
- `uppHotKeys_[LOGIN].txt`
- `uppTAPIExt_[LOGIN].ini`
- `uppsystem.log` (bzw. je nach Namenseintragung im Telefonprofil)

- uppProfile.xml
- CRMphone.log

User Rights:

The following entries allow you to deny access to individual fields in the **CRM.phone TAPI Configuration** dialog box.

```
[USER_RIGHTS]

Config  Make Call: Wait for Connected=1
Config  Make Call:  AutoHangup =1
Config  Inquiry: Wait for Connected=1
Config  Inquiry:  AutoHangup =1
Config  Inquiry:  AutoReconnect =1
Config  AutoAnswer : Call1=1
Config  AutoAnswer : Call2=1
Config  Disconnected:  AutoHangup =1
Config  Device name =1
```

Users can access all options with a value of 1. To deny users access to an option, set the value to zero. These options can then no longer be selected in the **CRM.phone TAPI Configuration** dialog box.

Disabling the functions assigned to F11 and F12

You can disable the functions assigned to the F11 (answer) and F12 (hang up) keys using the following entries:

```
[PHONE_SPECIFIC]

Suppress F11 Answer = 1
Suppress F12 Hangup  = 1
```

The default value for both entries is 0 (the functions are enabled).

Incorrect numbers in the call history

Depending on your telephone system, numbers in the call history may be displayed incorrectly (the leading 0 in the area or country code is not displayed).

Use the following entries to prevent the 0 from being removed for incoming and outgoing calls:

```
Suppress Outbound Prefix Cut = 1
Suppress Inbound Prefix Cut  = 1
```

The default value for both entries is 0.

Converting from ANSI to UNICODE

By default, CRM.phone converts call data from ANSI to UNICODE.

Use the following entry to determine that the call data is transferred by the system to CRM.phone as UNICODE.

```
[PHONE_SPECIFIC]
```

```
Unicode Call Data = 1
```

Adding dialled numbers to the call history

Use the following entry to determine the format how dialled numbers are added to the call history.

```
[PHONE_SPECIFIC]
```

```
Use Internal Call Length = 0
```

Possible values:

- 0 (default): Numbers are added including country and area code.
- 1: Numbers are added as they were dialled, e. g. internal or local calls without contry and area code.

TAPI-specific Settings

[TAPI_SPECIFIC]

Ignore Call ID Flags	Some TAPI systems (e.g. old Bosch systems) do not set Call ID Flags. In this case, set this parameter to 1. The default value is 0.
Reset on Failed	If MakeCall fails, the TAPI application is reset if Reset on Failed is set to 1. The default value is 0.
Number of Resets	This parameter determines the number of reset attempts if Reset on Failed is activated. The default value is 1.
Use Event	If this parameter is set to 1, TAPI Event Handle mechanism for notification is used. The default value is 0.
Callback Sleep	If the status changes, some TAPI systems provide additional information only after a delay. CRM.phone waits for the defined timeout period (in milliseconds) before requesting additional call information. A value of 300 is recommended, however different telephone systems may require different values. The default value is 0 (disabled).

Leading Zero is External	Some TAPI systems (e.g. Panasonic) interpret external calls that have been redirected or picked up on another extension as internal calls. If <code>Leading Zero is External</code> is set to "1", calls where the number begins with 0 are always interpreted as external calls. Note that the telephone system nonetheless needs to be configured such that external calls begin with 0. The default value is 0 (disabled).
Skip Empty ConnectedID	If the TAPI system sends an empty <code>ConnectedID</code> when the status is "Connected", no number is displayed in <code>CRM.phone</code>. If <code>Skip Empty ConnectedID</code> is set to "1", the empty <code>ConnectedID</code> is not sent and a valid number is therefore not overwritten in <code>CRM.phone</code>. The default value is 0 (disabled).
Connect before Hangup	By default, TAPI allows incoming calls with the status "Ringing" to be terminated without the call first being connected. This call is then displayed as "No answer" in the call list. Depending on your telephone system, the call may need to be connected before it can be terminated. In this case, set <code>Connect before Hangup</code> to "1". In this case, these calls are displayed as successful in the call list. The default value is 0 (disabled).
AutoReset on OutOfService	The line is still valid, but (temporarily) unavailable. In this case, <code>Autoreset</code> is generally not advisable. 1 = Auto-reset is performed 0 = no auto-reset
AutoReset on LineClosed	The line was closed by the system, e.g. due to a restart of the telephony system. In this case an <code>Autoreset</code> is advisable: 1 = Auto-reset is performed 0 = no auto-reset
OutOfService MessageBox	1 = A message is displayed that the TAPI extension xx is out of service. 0 = No message is displayed

LineClosed Messagebox	1 = A message is displayed that the TAPI extension xx has been closed by the system. 0 = No message is displayed
Caller ID Notification	Some TAPI systems do not transfer the number of a number of the caller when transferring calls in the default version of CRM.phone. Example: a caller is forwarded to the sales department by a call center agent. The sales rep sees the number of the forwarding extension instead of that of the caller. This behavior is due to deviations from the TAPI standard by some telephony systems. The following workaround has been implemented for the Swyx system: <code>Caller ID Notification = 1</code> ensures that the number of the caller is forwarded when using Swyx TAPI systems.
No Device List	On terminal server installations of Aurea.CRM web, users are prompted to select an extension from a drop-down list when logging on to the system. If <code>No Device List = 1</code>, the list of extensions is no longer available following the first login (when an extension must be selected), >> Using CRM.phone with Terminal Servers.

Logging

You can define that log data is written to the `CRMphone.log` file. This file is located:

- Aurea.CRM win: in the user's directory
- Aurea.CRM web: in the directory where phone is installed or in the `%APPDATA%\update\Phone\` directory (depending on the **Use User Folder** parameter).

[PHONE_LOG]

To determine which events are logged, set the desired parameters to 1.

Standard = 1	If you set the <code>Standard</code> parameter to 1, you can define the following additional parameters to log specific events: Idle = 1 Ringing = 1 Dialtone = 1 Dialing = 1 Ringback = 1 Busy = 1 Connected = 1 Onhold = 1 Conference = 1 Disconnected = 1 Default value for all parameters = 0
All = 1	If you set the <code>All</code> parameter to 1, all events are logged. This setting overrides all other parameters.

For performance reasons, only use the log mechanism for troubleshooting.

uppTapiExt.ini

You can define additional agents when using Alcatel telephone systems.

Example: It may be necessary to allow "normal" users to also log on as call center agents. In Alcatel telephony systems, this causes the user's extension to change.

To define the additional extension as an additional agent in Alcatel systems, enter the following in the `uppTapiExt.ini` file of the user:

[DEVICE_SPECIFIC]

Device Name_2	Name of the extension of the additional agent, e.g. CTI_595.
Device ToggleDelay	Determines the number of seconds required by your telephone system to provide access to an additional agent when switching from a "normal" user (and vice versa). Default = 0