



Customer Relationship
Management

CRM.phone User Manual

Version 14.1

Notices

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Table of Contents

Preface.....	5
About this documentation.....	5
Notation conventions.....	5
Aurea global support.....	6
 Chapter 2: CRM.phone.....	 7
About CRM.phone.....	8
Documentation PDFs.....	9
Configuring CRM.phone.....	9
 Chapter 3: Using CRM.phone.....	 10
Toolbar.....	10
Answering Calls.....	12
Dialling Numbers.....	13
Inquiries.....	14
Transferring.....	15
Direct Transfer.....	15
Switching between Calls.....	15
Sending Record Information.....	16
Conference Calls.....	17
Phone Actions.....	17
Quick Dial.....	19
Calling from an Aurea CRM Record.....	20
Notes on Entering Telephone Numbers.....	22
Copying Telephone Numbers.....	22
Copy Algorithm.....	23
Copying Extensions.....	24
Copying Numbers in Aurea CRM web.....	24
Determining the Outgoing Number in Aurea CRM.....	25
Using CRM.phone with Aurea CRM web.....	27
Using CRM.phone with Skype (Enterprise Feature).....	28
CRM.phone Lync/Skype For Business Client Dialog.....	28
 Chapter 4: CRM.phone Dialog Box.....	 33
CRM.phone Settings.....	35
Call Configuration.....	37
Customising Keyboard Shortcuts.....	39

CRM.phone Keyboard Shortcuts in Aurea CRM win and Aurea CRM web.....	40
History Options.....	41
Additional Functions.....	42
Resetting the Telephony Software.....	43
Sending Aurea CRM win to the Foreground.....	43
Switch to Aurea CRM.....	44
Configuring the CRM.phone Dialog Box.....	44
Switching between CRM.phone Profiles.....	45

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](#).

2

CRM.phone

CRM.phone provides a direct connection to the customer data stored in Aurea CRM, allowing you to access this data immediately.

Telephone numbers or Skype IDs are dialed and inbound calls assigned to a company or person via the underlying telecommunication system, like TAPI or Skype for Business. To be able to assign telephone numbers correctly, incoming calls need to be identified by the CRM.phone and a corresponding entry found in Aurea CRM's database.

Data from the call, e.g. the call status, can be embedded into complex processes (workflows) and processed by Aurea CRM.

You can use CRM.phone directly from within Aurea CRM win (TAPI only) and Aurea CRM web (TAPI and Skype for Business). You can access standard telephony functions from within both applications using the CRM.phone toolbar. The toolbar also provides access to the **CRM.phone** and **CRM.phone Actions** dialog boxes. The **CRM.phone** dialog box also provides an overview of the number and status of telephone lines and allows you to access the call history and telephone book. The **CRM.phone Actions** dialog box displays information including details of a call.

The CRM.phone interface is easy to use, and if you are already familiar with Aurea CRM, you can find your way around very quickly. This document provides an overview of the design, functionality, and features in CRM.phone.

CRM.phone provides the following functions:

- Standard telephony functions for land lines and mobile networks
- Caller recognition
- Access to customer information during a call
- New activity records for calls
- Dial options for outgoing calls
- Automatic call duration logging
- Conference calls
- Call history, allowing processes to be optimized
- Processing options in Aurea CRM win and Aurea CRM web using appropriate workflows
- Integration with any telephone system that supports TAPI 2.x or higher.

About CRM.phone

Learn to view version and patch information about CRM.phone.

To display version information on CRM.phone from the **CRM.phone** dialog box:

- Select **Help > About CRM.phone** from the menu to display copyright and version information.
- Select **Help > Help** to open the help files.
- Press F1 to open the help files.

Patch Information

You can display information on your installation, such as the version number, current service pack, patch level etc.

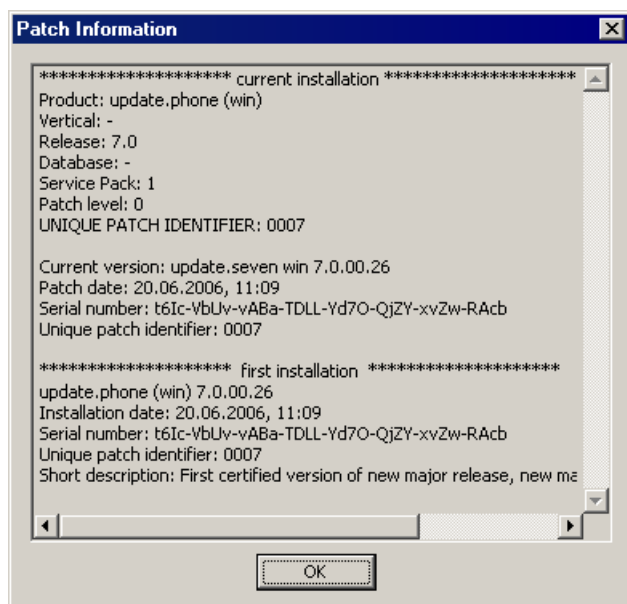
To display the patch information:

1. Select **Help > About CRM.phone** from the menu.

The **About CRM.phone** dialog box is displayed.

2. Click on the **Patch Information...** button.

The Patch Information window is displayed.



Documentation PDFs

Download the pdf help for the Phone User Manual here.

Document	Description
Phone User Manual	A user manual for Phone User Manual.

Configuring CRM.phone

CRM.phone is configured and activated from the **Rights** module. This is normally done by your Aurea CRM system administrator.

Your administrator creates telephony profiles, and associates one or more CRM.phone profiles to your account. A CRM.phone profile controls the telephony functions as well as the telecommunication system available to you. A profile can be associated with only one of the available telecommunication systems: TAPI; or Skype for Business. For example, you can have two profiles assigned to you, one allowing you access to the TAPI communication system and one for the “Skype for Business” telecommunication system.

Note: Skype for Business is available for use only from the Aurea CRM web and also requires an enterprise license.

To switch between CRM.phone profiles in an Aurea CRM web session or a CRM.win session, see [Switching between CRM.phone Profiles](#) on page 45.

Note: You require administrator privileges to access the **Rights** module, see [CRM.phone Administrator Guide](#).

3

Using CRM.phone

The CRM.phone component is loaded automatically when Aurea CRM win or Aurea CRM web is started.

CRM.phone is a soft phone solution that can access all the telephony functions provided by your telecommunications system and enabled in your telephone profile, see [Toolbar](#) on page 10.

The telephony functions provided by CRM.phone are available from the CRM.phone toolbar. The **Quick Dial** and **Actions** buttons in the toolbar are not available in Aurea CRM web.

You can also display all telephony functions in a separate dialogue box, see [CRM.phone Dialog Box](#) on page 33.

Toolbar

Learn about the toolbar icons and their functions.

The following telephony functions are available from the toolbar and the **Aurea CRM.phone** dialog box:

Icon	Function	phone	win	web
	Answer call	Yes	Yes	Yes
	Hang up	Yes	Yes	Yes
	Pick up (pick up a call to another extension)	Yes	Yes	Yes
	Transfer call	Yes	Yes	Yes
	Redirect incoming call (to another extension without answering the call)	Yes	Yes	Yes

Icon	Function	phone	win	web
	Hold (puts a call on hold or returns to a call currently on hold)	Yes	Yes	Yes
	Transfer call	Yes	Yes	Yes
	Send record information (once a connection has been established)	-	Yes	-
	Conference call	Yes	Yes	Yes
	Add participants to conference (only available in the update.seven phone dialog box)	Yes	Yes	Yes
	Permanently redirect to extension	Yes	Yes	Yes
	Display the telephonedirectory	Yes	Yes	Yes
	Call history	Yes	Yes	Yes
	Disable actions	Yes	Yes	Yes
	Display CRM.phone actions (not in the toolbar in Aurea CRM web)	Yes	Yes	-

Icon	Function	phone	win	web
	Reset	Yes	Yes	Yes
	Display update.seven phone dialog box	Yes	Yes	Yes
	Dial	Yes	Yes	Yes
	Quick dial (only in the Aurea CRM win toolbar)	-	Yes	-

Note: These commands can also be executed using keyboard shortcuts, which you can define yourself, see [Customising Keyboard Shortcuts](#) on page 39.

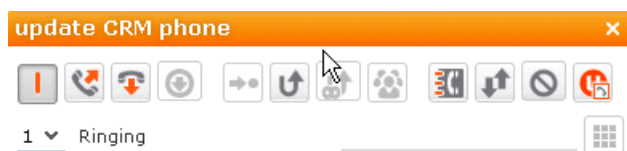
Your administrator can define additional functions that can only be accessed in Aurea CRM win using the **Additional Functions** button, see [Additional Functions](#) on page 42.

Answering Calls

Learn about incoming calls and answering them on CRM.phone.

To answer calls in Aurea CRM win and web:

1. Whenever there is an incoming call, the following details of the call are displayed in the CRM.phone toolbar:



- The line the call is received on
- The call's status ("Ringing")
- The caller's telephone number
- The duration of the call. This field remains empty until you answer the call

2. Click  (**Answer call**).

The connection is established.

To answer calls in the **CRM.phone** dialog box:

1. Click  (**CRM.phone dialog box**) in Aurea CRM.

The **CRM.phone** dialog box is displayed.

2. The following information is displayed for incoming calls:

Line	Status	Number	Duration
→ 1	Ringing	8838203	
2	Idle		
3	Idle		

Number:	8838203	
Info:	William Taylor	
Find:		

- The line the call is received on
 - The call's status (in this case "Ringing")
 - The caller's telephone number
 - The duration of the call.
 - Details on the caller if the caller's number is stored in the telephone book, call history or Aurea CRM database.
3. Click  (**Answer**) or select **Phone Answer** call from the menu.

Dialling Numbers

Learn how make phone calls in Aurea CRM Web or Win.

To dial a number in Aurea CRM win and web:

1. Enter the telephone number you wish to dial in the field to the left of the  (**Dial**) button.

update CRM phone



1 ▾ Idle

12456



2. Click on  (**Dial**) or press Enter.

The number is dialled.

To dial a number from the **CRM.phone** dialog box:

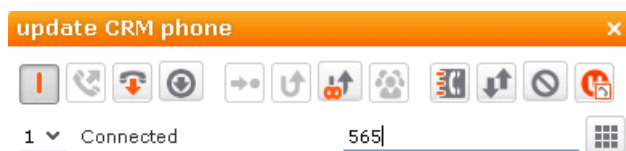
1. Click on  to open the **CRM.phone** dialog box
2. Enter the number you wish to dial in the **Number** field or select an entry in the telephone directory or call history.



3. Click on  (**Dial**) or press Enter.

You can also double-click an entry in the phone book or history to dial a number.

The connection with the company or person is established. The details of the company or person are displayed in the **Info** field if the number is stored in the telephone directory, call history or Aurea CRM.



4. You can also use the **Dial** button or Enter key to start an inquiry, see [Inquiries](#) on page 14.

Inquiries

If a connection has already been established, you can carry out an inquiry in CRM.phone.

To make an inquiry in Aurea CRM win and web:

1. Ensure that a connection has already been established, see [Answering Calls](#) on page 12.
2. Enter the telephone number of the person you wish to direct the inquiry to in the **Number** field.
3. Click on  (**Dial**) or press Enter.

The first caller is put on hold and the second number is dialed.

To make an inquiry from the **CRM.phone** dialog box:

1. A connection must already exist, see [Answering Calls](#) on page 12.
2. Enter the telephone number of the person you wish to direct the inquiry to in the **Number** field or click on an entry in the phone book or call history.

Click on  (**Dial**), press Enter or select **Line > Inquiry** from the CRM.phone menu.

Following an inquiry, there are several other telephony functions you can use, see [Transferring](#) on page 15, [Conference Calls](#) on page 17 and [Switching between Calls](#) on page 15.

Transferring

Use the transfer function to transfer a call to a third party without picking the incoming call.

To transfer a call perform the following:

1. Enter the telephone number of the third party you wish to transfer the call to, in the number field.
2. Click  (**Transfer**) to connect the two callers with each other.

Direct Transfer

You can directly transfer calls to a third party without starting an inquiry.

To transfer a call directly:

1. Ensure that you have received the call on the incoming line.
2. On another extension line, enter the telephone number of the third party you wish to transfer the call to, in the number field.
3. Click on  (**Direct transfer**) to transfer the call to another extension.

Switching between Calls

You can switch back and forth between callers.

Callers not currently taking part in the call are put on hold. How many lines you can hold depends on your telephone system.

To switch between calls in Aurea CRM win and web:

1. Establish a connection, see [Answering Calls](#) on page 12.
2. As soon as a second call is connected (incoming or outgoing call), the first call is put on hold.
3. Switch to the line on hold and click on  (**Hold**) to resume the call with the initial caller.

To switch between calls in the **CRM.phone** dialog box:

1. Establish a connection, see [Answering Calls](#) on page 12.
2. As soon as a second call is connected (incoming or outgoing call), the first call is put on hold.

Line	Status	Number	Duration
→ 1	On Hold	01234567023456	00:00:30
→ 2	Connected	08837299023456	00:00:25
3	Idle		

Number:

08837299023456

☰

Info:

Marmeduke Albert Smythe-Hewlett

3. Select the call on hold and click on  (**Hold**) to resume the call with the initial caller.

Sending Record Information

Learn how to send record information.

Note: Whether this option is available depends on your telephone system.

Note: This option is not available in Aurea CRM web.

To transfer the current record when a connection has been established:

1. Establish an internal connection.
2. Click  (**Send Record Information**).

The current record is transferred to the other party:

- If you have edited the record and not saved your changes, you asked whether you wish to save the record.
- If the recipient has edited a record and not yet saved these changes upon receiving the record, the recipient is asked whether they wish to save the current record before loading the sent record.
- If the recipient is not editing a record, the recipient is asked whether the sent record should be loaded.

Conference Calls

Learn how to make a conference call in Aurea CRM.

To initiate a conference call in Aurea CRM:

1. Start an inquiry, see [Inquiries](#) on page 14.
2. Click on  (**Conference**).

The call you put on hold is added to the conference call.

To initiate a conference call in the **CRM.phone** dialog box:

1. Start an inquiry, see [Inquiries](#) on page 14. You now have one caller on hold and are directly connected to another caller.
2. Click  (**Conference**) or select **Line > Conference call** from the menu.

Line	Status	Number	Duration
1	Idle		
→ 2	Conf. Master	021324234.023244223	00:00:57
3	Idle		

Both calls are added to the conference call, and you are the conference master.

3. Dial another number or answer an incoming call.
4. Click  (**Add to Conference**) or select **Line > Add to Conference call** from the menu to further callers to the conference call.

Note: The **Add to Conference call** function is not supported by all TAPI vendors.

The number of callers you can add to a conference call depends on your telephony software and telecommunications system.

Phone Actions

The details of the call are displayed in the **CRM.phone Actions** dialog box.

Note: This dialog box does not exist in update.seven web.

To display the **CRM.phone Actions** dialog box:

1. Click on  in Aurea CRM.

The screenshot shows a configuration window for CRM.phone. It has a title bar with 'Option' and 'View' buttons. Below the title bar are several input fields: 'Condition:' with 'Ringing', 'Task:' with 'Load company', 'Number:' with '556', 'Data:', 'ACD:', and 'Task Info:'. Below these is a 'Hit:' section with a dropdown menu showing 'update sales GmbH'. At the bottom is a table with two columns: 'Column name' and 'Text'. The table has one row with 'Company' in the first column and 'update sales GmbH' in the second column. There are scroll bars at the bottom of the table and the main window.

Column name	Text
Company	update sales GmbH

If a telephone number is assigned to more than one person or company, the caller can be selected from several possibilities in a drop-down list.

You can start a workflow by double-clicking on a workflow in the list of **Available Workflows**. Workflows can also be started automatically.

2. The following information is displayed:

- **Condition:** This field displays the current or last telephony event.
- **Task:** This field displays the task associated with the condition, >> Configuring Tasks in the *CRM.phone Administrator Guide*.
- **Number:** This field displays the number of the call.
- **Data:** Additional data can be included with incoming calls. This data is displayed in this field.
- **ACD:** The forwarding number (usually the call center group number) is displayed here.
- **Task Info:** Additional information on the task is displayed in this field.
- **Hit:** The number of hits found in the **Company/Person** info areas. If several companies or persons are returned, click in the field or on the arrow next to the field to open a drop-down list. Select the desired company or person from the list.
- Detailed caller information: Displays information from the record selected under **Hit**. The fields displayed in the list are determined by your administrator.

3. Click the **Close** button to confirm your settings.

Configuring the Phone Actions Dialog Box

You can determine which information is displayed in the **CRM.phone Actions** dialog box. Information is divided into sections.

To hide or display a section:

1. Open the **View** menu in the **CRM.phone Actions** dialog box.
2. Enable or disable the tick next to an option to determine which sections are displayed.

Disabling Actions

Select **Disable Actions** to prevent call data from being transferred to Aurea CRM and thus suppress the associated actions. You can still work with CRM.phone however. Actions are only disabled for the current session.

To disable conditions:

- Click on  (**Disable Actions**).

Actions are disabled and the system does not execute any CRM.phone actions (automatic and manual) in Aurea CRM.

Quick Dial

Quick dial allows you to instantly access certain important numbers.

You can store several telephone numbers in the **Company** and **Person** info areas in Aurea CRM, e.g. the number of the company and mobile numbers. You can access these numbers from the CRM.phone toolbar. Your administrator determines which of these numbers is available by default using the **Quick Dial** button. You can select all the numbers from the toolbar.

The **Quick Dial** button can be used to access telephone fields in the **Company** and **Person** info areas that have been added by your administrator, see [Data Model](#) in the *CRM.core Administrator Guide*.

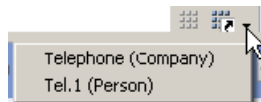
Note: The quick dial function can only be accessed from the CRM.phone toolbar in the Aurea CRM win and is not available in Aurea CRM web.

To use the quick dial function:

1. Click on  (**Quick dial**).

The number assigned to the quick dial function by your administrator is dialed.

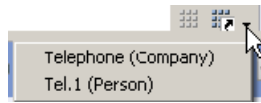
If no entry is found in the field assigned to the quick dial function, all numbers entered in this record are displayed and you can select a number from the list:



Alternatively:

1. Click on the downwards arrow next to the **Quick dial** button.

All telephone numbers stored for this record are displayed.



2. Select the number you wish to dial.

The number is dialed.

Aurea CRM web:

You do not have access to the quick dial function in the Aurea CRM web. However, you can still access the numbers entered in a record by selecting **Make Call** from the context menu. A wizard is started presenting you with a list of available telephone numbers to choose from.

Note: Additional telephone fields are **not** displayed in web.

Calling from an Aurea CRM Record

If numbers have been stored in Aurea CRM, such as telephone numbers for companies or cell phone numbers for contact persons, you can call these numbers directly from the record they are stored in.

To call directly from a marketing manager record:

1. Switch to the company or person you want to call in the **Company+Person** info area in Aurea CRM.
2. Make sure you are in mask view.

The following screenshot shows a record in Aurea CRM win:

Company: ACME Potatoes Ltd.
 Synonym: ACMEP Lead Status: Comp.Customer
 Country: UK Telephone: 181 8837299
 City: NW 2 3 London Fax: 8837299-10
 Street: Old Kent Road 23 Area:
 E-mail 1:
 Internet: www.potatoes.co.uk
 Address... Classification Miscellaneous
 Gender: Mr. Last Name: Smith
 Title: Dr. First Name: John
 Division: Consulting Tel 1: 8837299-102
 Position: Consultant Fax:
 Job Title: External Consultant Mobile Tel.:
 Influence: High Priority:
 E-mail 1:
 Position: Miscellaneous Private

The following screenshot shows a record in Aurea CRM web:

Form of address: Mr. Title:
 First Name: Jonne Last Name: Aaron
 Tel 1: 0345934015340593 Mobile Tel.:
 Address: Position: Classification:
 Postal Code: City: Helsinki
 Street: Mannerheimintie 145 Country:
 E-mail 1: jonne.aaron@krist-intl.fi E-mail 2: jonne.aaron@krist-intl.fi

- Click on the telephone icon (**Make Call**) in a telephone field.

Note: In web, the **Make Call** button () is only displayed in edit mode. In view mode, the telephone number is displayed as a link. Click on that link to dial the number. Your administrator can also configure the buttons such that you can use the button to copy telephone numbers from CRM.phone to an Aurea CRM telephone field, see [Copying Telephone Numbers](#) on page 22.

A connection with the desired company or person is established.

In Aurea CRM, the CRM.phone toolbar displays following information:

update CRM phone
 1 Connected 565

You can also use the **Make Call** button to activate the inquiry function.

1. Switch to another record in Aurea CRM.
2. Click the **Make Call** button (or in Aurea CRM web the linked telephone number) again. This places the first call on hold and establish a connection with the second number.

Alternatively, you can activate the inquiry function from the **CRM.phone** dialog box, see [Inquiries](#) on page 14.

Notes on Entering Telephone Numbers

Fields in Aurea CRM that only contain an extension (e.g. the **Tel. Ext.** field in the **Person** info area) have been configured accordingly in the data model.

If the telephone number for the company was entered as 0 (for the switchboard), the 0 must be separated from the rest of the telephone number using a hyphen (-), e.g. 87855-0 (and not 878550).

If no hyphen is present, the wrong number is dialled when calling from a field that only contains an extension.

Example 1

Telephone number in the company record: 878550 (where 0 is the switchboard).

Extension in the person record: 123

Number called from the person record: 878550123; the connection cannot be established.

Example 2

Telephone number in the company record: 87855-0 (where 0 is the switchboard).

Extension in the person record: 123

Number called from the person record: 87855123; the correct number is dialled.

Copying Telephone Numbers

You can copy telephone numbers from CRM.phone and paste them into a telephone field in Aurea CRM win or Aurea CRM web.

For example, if a customer calls who is stored in the Aurea CRM database, but without a telephone number, you can copy the number from CRM.phone to the appropriate telephone field in Aurea CRM.

To copy a telephone number to Aurea CRM:

1. Switch to a record containing telephone fields in Aurea CRM (e.g. a company or person).
2. To copy the telephone number:

- Aurea CRM win: Right-click on  next to the telephone field.
- Aurea CRM web: Click on  (**Make Call**) next to the telephone field, see [Copying Numbers in Aurea CRM web](#) on page 24.

A popup menu is displayed, except in the following circumstances:

- Aurea CRM win: If the telephone field in the CRM.phone toolbar and the telephone field in Aurea CRM are empty and no number is stored in the cache (i.e. there is no number to call or copy).
 - Aurea CRM web: If a number is displayed in the telephone field in the CRM.phone toolbar or is stored in the cache and the telephone field in Aurea CRM web is empty. In this case, the number is automatically copied by clicking on  (**Make Call**).
 - Aurea CRM win and Aurea CRM web: If the user does not have the necessary privileges to edit the telephone field.
3. Select **Copy telephone number** from the popup menu.

The telephone number is copied to the Aurea CRM field.

Note: Numbers displayed in the CRM.phone toolbar are stored in the cache until the next call is received. You can therefore copy the number even when it is no longer displayed in the toolbar.

Copy Algorithm

Telephone numbers are entered in generic telephone and mobile phone fields including the country and area code (if available), but without the prefix for external calls.

If you copy a number from CRM.phone to a standard telephone field in Aurea CRM, Aurea CRM automatically verifies whether the country and area code has already been entered:

- The country code is handled as follows:
 - The **Country Code** field is empty: The complete telephone number (including country and area code) is entered in the standard telephone field.
 - The **Country Code** field contains a country code: If the country code differs from the code in the copied number, the complete telephone number (including

country and area code) is entered. If the country codes match, the area code is tested.

- The area code is handled as follows:
 - The **Area Code** field is empty: The complete telephone number (including country and area code) is entered in the standard telephone field.
 - The **Area Code** field contains an area code: If the area code differs from the code in the copied number, the complete telephone number (including country and area code) is entered.
 - If both country and area codes match, the telephone number is entered in the standard telephone field without the country and area code.

Note: The numbers are entered without the external prefix. If a number is copied to a field that already contains a phone number, the old number is overwritten.

Copying Extensions

You can choose to copy only the extension of an incoming call to the corresponding field in the person record, if the company's telephone number has already been entered.

Example: A contact person calls you. You switch to the corresponding customer record in Aurea CRM. The company's phone number has already been entered, but not the extension of the contact person you are talking with. The extension is included in the incoming call's number.

The telephone number is tested against the company number. If the company number matches the incoming number, the remaining digits are treated as the extension. Select **Copy telephone number** from the popup menu to transfer the remaining digits to the extension field.

Copying Numbers in Aurea CRM web

Learn how to copy numbers in Aurea CRM web.

Note: Your administrator is responsible for determining whether you can copy telephone numbers in Aurea CRM web.

Click on  (**Make Call**):

- If the telephone number field in the CRM.phone toolbar contains a number and the telephone field in Aurea CRM web is empty, the telephone number is copied automatically and the context menu is not displayed.
- If a number is entered in Aurea CRM web and the telephone number in the CRM.phone toolbar is empty, the number is dialled automatically and the context menu is not displayed.
- If both fields contain a number, the context menu is displayed.
 - Select **Make Call** to dial the number.
 - Select **Copy Telephone Number** to overwrite the number in the telephone field in Aurea CRM with the number from the CRM.phone toolbar.

Determining the Outgoing Number in Aurea CRM

If you dial a number in Aurea CRM, the complete number including the country and area code is generated.

This number is then compared to the settings in your telephone profile:

- If the number is an internal number, the country and area codes and your company's number are removed and the extension is called.
- If the number is an external number, the external prefix entered in your profile is added to the start of the number.

When determining the number to call, the system checks whether the number in the telephone field already includes the country and area code. For example, if the area code is entered in the field, CRM.phone adds the country code to the start of the number.

Examples:

Data in Aurea CRM	
Country Code	0043
Area Code	01

Number in Telephone Field	Number Generated	Notes
87855	0043187855	The country and area code are taken from the Country Code and Area Code fields and added to the number.
070787855	004370722334455	The country code is taken from the Country Code field and added to the number.
0049187855	0049187855	The number already includes the country and area code.

The number generated by this procedure is then compared to the entries in your telephone profile. Matching sections (identical country code, area code, company number) are discarded. CRM.phone can recognize whether the number is an internal or external number. If the country code, area code and company number all match, the remaining digits are treated as an extension. If the country and area codes match, but the company number is different, CRM.phone removes the country and area code and adds the external prefix to the number, thus calling a number in the same area.

Examples:

Telephone Profile Settings	
Your country code	0043
Your area code	01
Your company number	87855
External prefix	0

Number Generated	Number Dialed	Type of Call
0043187855524	524	The country code, area code and company number all match. The remaining digits are treated as an internal extension.
0043122334455	022334455	The country and area codes match. This is a local call, the external prefix is added to the start of the number.
004370722334455	0070722334455	The country code matches. This is a national call, the external prefix is added to the start of the number.
0049122334455	0004922334455	No matches. This is an international call, the external prefix is added to the start of the number.

Using CRM.phone with Aurea CRM web

Learn how to use CRM Phone with CRM Web.

If you are using CRM.phone with Aurea CRM web, note the following:

- If CRM.phone is available, the telephone symbol () is displayed in the side bar.
 1. Click on  to show the CRM.phone toolbar.
 2. Click on  (**Close**), to hide the toolbar.

CRM.launcher

You need to install CRM.launcher on your PC, or you cannot use CRM.phone. CRM.launcher is part of Aurea CRM web, therefore, you'll find information on installing CRM.launcher in the *Aurea CRM web Administrator guide*.

Using CRM.phone with Skype (Enterprise Feature)

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

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

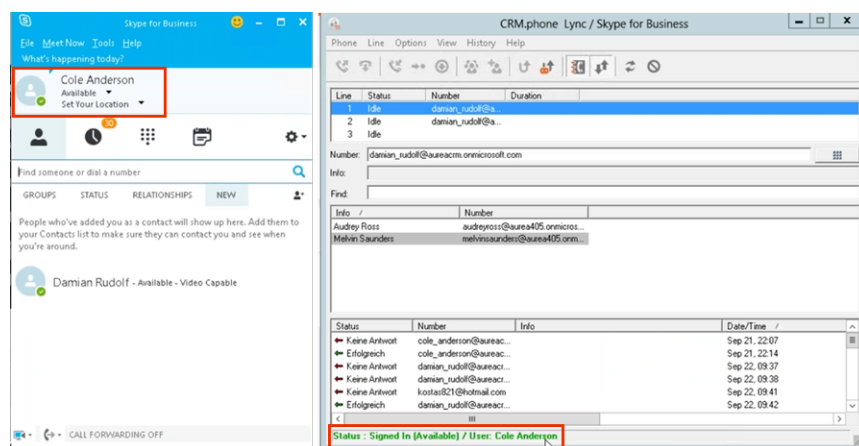
Note: In this document, if the term “Skype client” refers to “Lync or Skype for Business client”.

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

CRM.phone Lync/Skype For Business Client Dialog

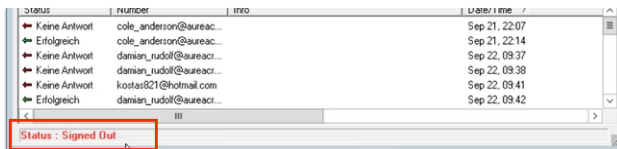
CRM.phone communicates with the local Skype for Business client and synchronizes the status of the current CRM web user.

The screenshot below shows the current status of the user in both the Skype for Business client and the CRM.phone dialog.



Note: The **CRM.phone Lync/Skype for Business** dialog contains Skype IDs and telephone numbers in the **Number** column.

If the CRM web user signs out of Skype tool, CRM.phone is automatically updated about the new status as shown below:



Status	number	Info	Date/Time
Keine Antwort	cole_anderson@sureac...		Sep 21, 22:07
Erfolgreich	cole_anderson@sureac...		Sep 21, 22:14
Keine Antwort	damian_rudolf@sureac...		Sep 22, 08:37
Keine Antwort	damian_rudolf@sureac...		Sep 22, 08:38
Keine Antwort	kostas921@hotmail.com		Sep 22, 08:41
Erfolgreich	damian_rudolf@sureac...		Sep 22, 08:42

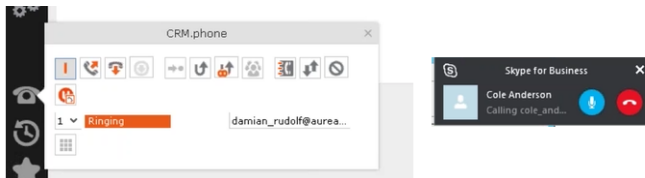
Below the table, a status bar indicates: **Status : Signed Out**

To open the CRM.phone dialog, click  in the CRM.phone toolbar. For information on the CRM.phone toolbar, see >> [Toolbar](#) on page 10.

All telecommunication activities performed from CRM.phone or the Skype client are automatically updated and synchronized between them. For example, the following screenshot shows the user initiated a call from CRM.web and the same call is active on the local skype tool at the same time.

Similarly, if a call is initiated from the skype tool it is registered and visible in CRM.phone. For more information on making calls, >> [Dialling Numbers](#) on page 13.

An in-coming call is detected by both the skype tool as well as the CRM.phone toolbar. The following screenshot shows an incoming call in both the skype client and CRM.phone toolbar (Ringing).

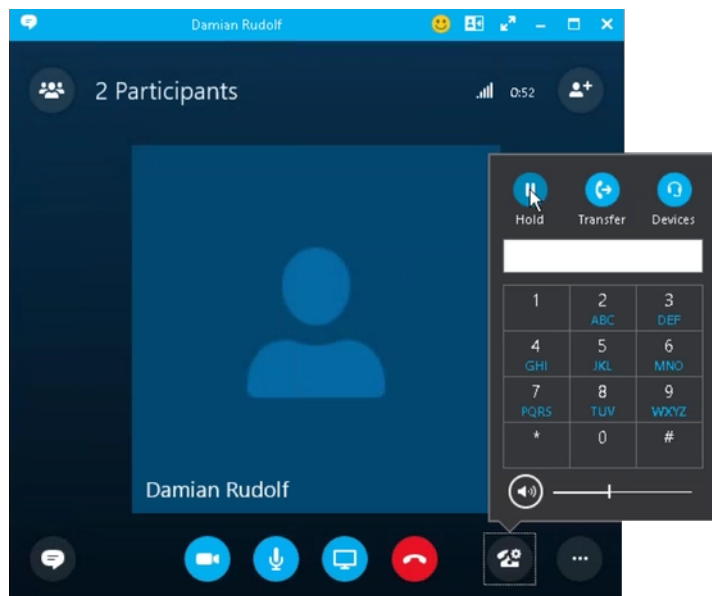


You can take the call from CRM.phone toolbar or from the skype tool. You can disconnect the call after receiving it from either the skype tool or use  in the CRM.phone toolbar. The following screenshot shows the CRM.toolbar with updated status (connected) when the call is received from the Skype client.



For more information on answering calls, see [Answering Calls](#) on page 12.

Similarly, putting a call on hold or retrieving a call put on hold, from either the skype client or CRM.phone results in corresponding status update in the other tool. To put a call on hold, click  in the CRM.phone toolbar. You can also use Skype client to put the call on hold, as shown in the screenshot below.



The following screen shot shows the status of a call put on hold from the skype client, results in a call status update in the CRM.phone toolbar.



To resume the call on hold, click  in the CRM.phone toolbar. To resume the call from Skype client, click **Resume Call**, as shown in the screenshot below.

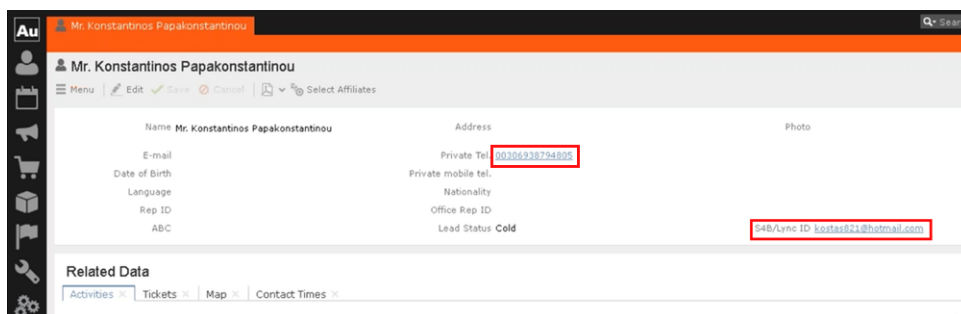


Note: You cannot resume a call, if the caller puts you on hold. The call can only be resumed by the caller.

For more information on holding and switching between calls, see [Switching between Calls](#) on page 15

If for some reason there is a break in communication between CRM.phone and the Skype client, you can reset the call status between the two tools by using the reset button (↺) in the CRM.phone dialog.

The Skype ID for Company and Person info area records is entered in the **S4B/Lync ID** field. See the screenshot below:



The telephone number or Skype for Business contact is displayed as a link. You can click on the link to make a skype call to the telephone number or the skype ID.

Details of all calls initiated and received from Skype tool or from the CRM.phone are logged in the CRM.phone log file. The following screenshot shows a sample log file.

```

22022 2016-09-22 11:07:34.182 INFO: Status bar text was set to: 'Status : Signed In (Offline) / User: Cole Anderson' using Green as font color
22023 2016-09-22 11:07:34.182 INFO: ===== CRM.phone === Lync/S4B PROFILE SETTINGS =====
22024 2016-09-22 11:07:34.182 INFO: Number of Lines: 3
22025 2016-09-22 11:07:34.182 INFO: Supported Functions:
22026 2016-09-22 11:07:34.183 INFO: Answer
22027 2016-09-22 11:07:34.183 INFO: Hangup
22028 2016-09-22 11:07:34.183 INFO: Hold
22029 2016-09-22 11:07:34.183 INFO: MakeCall
22030 2016-09-22 11:07:34.183 INFO: Redirect
22031 2016-09-22 11:07:34.184 INFO: Reset
22032 2016-09-22 11:07:34.184 INFO: Transfer
22033 2016-09-22 11:07:34.184 INFO: Conference
22034 2016-09-22 11:07:34.184 INFO: Add to Conference
22035 2016-09-22 11:07:34.185 INFO: =====
22036
22037 2016-09-22 11:07:34.185 INFO: Finished handling of CRM Phone triggered action: Client Initialization (linesNumber: 3)
22038 2016-09-22 11:07:34.185 INFO: Finished handling of S4B / Lync triggered action: Client state change
22039 2016-09-22 11:07:34.218 INFO: Started handling of S4B / Lync triggered action: Contact information change
22040 2016-09-22 11:07:34.231 INFO: Status bar text was set to: 'Status : Signed In (Offline) / User: Cole Anderson' using Green as font color
22041 2016-09-22 11:07:34.231 INFO: Finished handling of S4B / Lync triggered action: Contact information change
22042 2016-09-22 11:07:34.240 INFO: Started handling of S4B / Lync triggered action: Contact information change
22043 2016-09-22 11:07:34.244 INFO: Status bar text was set to: 'Status : Signed In (Offline) / User: Cole Anderson' using Green as font color
22044 2016-09-22 11:07:34.245 INFO: Finished handling of S4B / Lync triggered action: Contact information change
22045 2016-09-22 11:07:34.523 INFO: Started handling of S4B / Lync triggered action: Contact information change
22046 2016-09-22 11:07:34.528 INFO: Status bar text was set to: 'Status : Signed In (Offline) / User: Cole Anderson' using Green as font color
22047 2016-09-22 11:07:34.528 INFO: Finished handling of S4B / Lync triggered action: Contact information change
22048 2016-09-22 11:07:34.562 INFO: Started handling of S4B / Lync triggered action: Contact information change
22049 2016-09-22 11:07:34.592 INFO: Status bar text was set to: 'Status : Signed In (Available) / User: Cole Anderson' using Green as font color
22050 2016-09-22 11:07:34.592 INFO: Finished handling of S4B / Lync triggered action: Contact information change
22051 2016-09-22 11:07:34.921 INFO: Started handling of S4B / Lync triggered action: Contact information change
22052 2016-09-22 11:07:34.927 INFO: Status bar text was set to: 'Status : Signed In (Available) / User: Cole Anderson' using Green as font color
22053 2016-09-22 11:07:34.928 INFO: Finished handling of S4B / Lync triggered action: Contact information change
22054

```

4

CRM.phone Dialog Box

The **CRM.phone** dialog box provides access to the telephony functions (pick up, hang up etc.) via menus and a toolbar.

You are also provided with an overview of the number and status of the available telephone lines. The call history provides an overview of calls that have been conducted and the numbers in the list can be redialled quickly. You can store telephone numbers and extensions you need regularly in the telephone directory. Telephone directories can be distributed internally.

The telephone book contains a collection of extensions, numbers for quick dialling and telephone numbers, and is provided by your administrator. You can also create your own private telephone book.

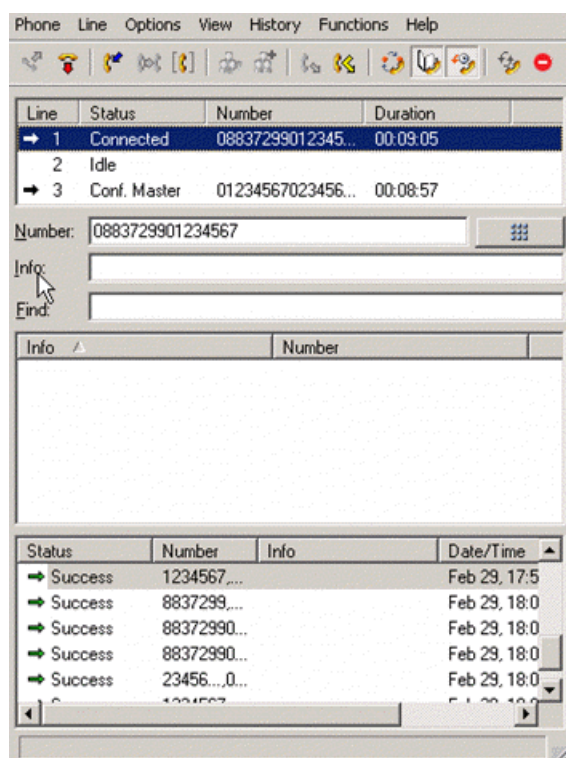
If your telephone or call-center system provides additional functions (such as external call routing etc.), these can be accessed under **Additional Functions**, see [Additional Functions](#) on page 42.

The telephony functions can also be accessed using the CRM.phone toolbar in Aurea CRM win or Aurea CRM web. The **CRM.phone** dialog box allows you to execute complex functions more easily, e.g. conference calls.

Your telephone system may not support all the options provided by CRM.phone.

Click the  button in Aurea CRM to open the **CRM.phone** dialog box.

The dialog box is divided into the following areas:



- The upper pane of the dialog box provides the following information:
 - **Line:** This column indicates the number of the telephone line and the origin of the call (inbound/outbound). A maximum of 3 lines are available (depending on your configuration).
 - **Status:** This column shows the status of the call (Connected, Idle, Ringing etc.).
 - **Number:** This column shows the number of the incoming or outgoing call.
 - **Duration:** This column shows the duration of the call.
- **Number:** You can enter a phone number to be dialed in this field. When calling from Aurea CRM or using the telephone directory or call history, the number is displayed automatically.
- **Info:** Depending on the configuration entered by your administrator, this field displays further details on the person you are speaking to, see *CRM.phone Administrator Guide*.
-  (**Dial**): Click this button to dial the number in the **Number** field.
- **Find:** Use this field to search in the telephone directory.

- **Phone book:** Names and numbers contained in the directories are displayed here.
- **History:** This area lists specific calls (using filters). You can verify the calls you have completed or redial a number. The following call information is stored:
 - Type of call (outgoing / incoming)
 - Status (Success, Busy, No Answer etc.)
 - Telephone number
 - Info (if available)
 - Date, time and duration.

Status bar: Displays information about the current telephony status.

CRM.phone Settings

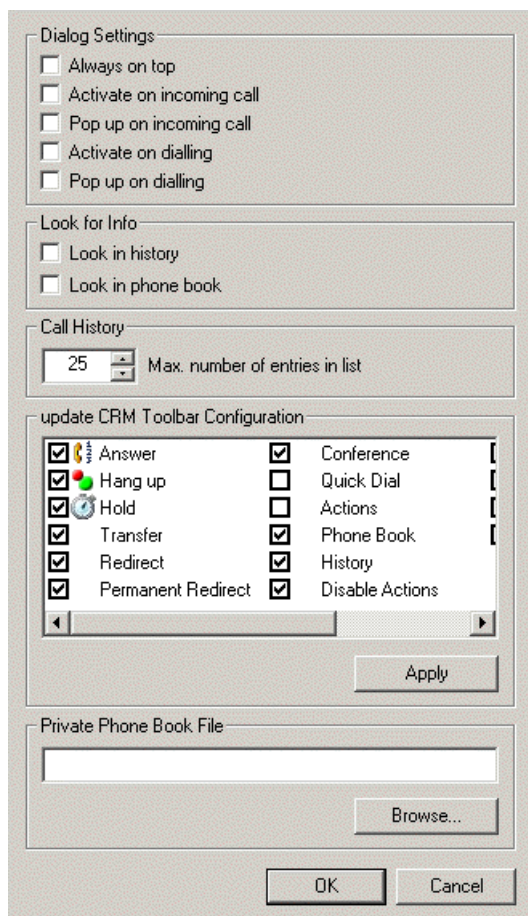
Use the settings to configure the call history, behavior of the dialog box and the internal telephone number search.

You can only access the settings from the **CRM.phone** dialog box.

To define the CRM.phone settings:

1. Click  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select **Options > CRM.phone Settings**.

The **CRM.phone Settings** dialog box opens.



3. The following settings are available in the **Dialog Settings** pane:

- **Always on top:** Enable this checkbox if you want the **CRM.phone** dialog box to appear on top of other applications.
- **Activate on incoming call:** Enable this checkbox, if you want to activate CRM.phone whenever a call is received. You can use your keyboard shortcuts to carry out the various functions, see [Customising Keyboard Shortcuts](#) on page 39.
- **Pop up on incoming Call:** Enable this checkbox if you want CRM.phone to be displayed during incoming calls.
- **Activate on dialling:** Enable this checkbox if you want to activate CRM.phone whenever an outgoing call is made. You can use your keyboard shortcuts to carry out the various functions, see [Customising Keyboard Shortcuts](#) on page 39.
- **Pop up on dialling :** Enable this checkbox if you want CRM.phone to be displayed during outgoing calls.

4. The following options are available in the **Look for Info** pane:
 - **Look in history:** The system searches the call history for the telephone number when an incoming call is made. If the number is found, the corresponding information is displayed.
 - **Look in phone book.** When incoming calls are received, the number is searched for in the telephone directory. If the caller is not in the database, but in the internal directory only, the caller can be identified before the call is taken.
5. Enter the maximum number of calls to be stored in the call history in the **Max. number of entries in list** field under **Call History**. Once the maximum number of calls has been reached, a new call replaces the oldest entry in the list. The maximum value you can enter is 999.
6. Determine the buttons available in the CRM.phone toolbar in Aurea CRM. Enable a checkbox to display a button in the toolbar. Click **Apply** to adopt the settings.
7. **Private Phone Book File:** Use this field to enter an additional private telephone book. Telephone books are text files containing entries in the following format:


```
<Name>;<Telephone Number>
e.g.:Smith, John;1-2223 324
```
8. Click **OK** to close the **CRM.phone Settings** dialog box.

Call Configuration

The dialog box used to configure call behavior varies depending on the call handling DLL specified by your administrator in your CRM.phone profile.

For further details, see *CRM.phone Administrator Guide*.

The TAPI solution is used as a standard and described below.

Incoming information from telephone systems is often varied. Configure your system to conform to your telephone system.

To configure call behavior:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select **Options > Call Configuration** from the menu.
3. The **TAPI Configuration** dialog box opens.

Call Options:

- ☐ Make call: wait for connection
- ☐ Make call: auto hang up
- ☐ Inquiry: wait for connection
- ☐ Inquiry: auto hang up
- ☐ Inquiry: auto reconnect
- ☐ Auto answer: 1st call
- ☐ Auto answer: 2nd call
- ☐ Disconnected: auto hang up

Device Name:

File for Additional Functions:

4. Enable the settings in the **Call Options** pane according to your requirements:

- **Make call: wait for connection:** Enable this checkbox, if you want CRM.phone to wait a given length of time (specified under **Wait for connection (seconds)** until the call is answered. If the call is not answered, the result **No Answer** is assigned and CRM.phone hangs up.
- **Make call: auto hang up:** Enable this checkbox if you want the call to be terminated automatically if **Busy**, **Invalid Number** or **No Answer** are returned.
- **Inquiry: wait for connection:** This option applies to a new call when the inquiry function is used.
- **Inquiry: auto hang up:** This option applies to a new call when the inquiry function is used.
- **Inquiry: auto reconnect:** Enable this checkbox if you want to re-establish the connection to the original call (placed on hold) if an inquiry results in CRM.phone hanging up automatically.

Note: This is the standard behavior of most telecommunications systems. If this is the case with your system, this option should **not** be enabled.

- **Auto answer: 1st call:** Enable this checkbox, if you want CRM.phone to automatically answer the call on the first line.
-

Note: This option is meant for call center agents. In normal circumstances, it should not be enabled, as update.seven phone answers **every** call, even if you are not at your desk.

- **Auto answer: 2nd call:** Enable this checkbox, if you want CRM.phone to automatically answer the call on the second line.
 - **Disconnected: auto hang up:** Enable this option, if you want CRM.phone to hang up automatically if the other end terminates the call (status "Disconnected").
-

Note: This is the standard behavior of most telecommunications systems. If this is the case with your system, this option should **not** be enabled.

5. Choose a **Device Name:** This drop-down list contains all TAPI extensions supporting a voice line configured on the workstation.
6. **File for additional Functions:** Depending on your telephone system, you can specify a text file containing additional functions, e.g. a permanent redirect to your mobile phone, see [Additional Functions](#) on page 42.
7. Click **OK** to save your settings.

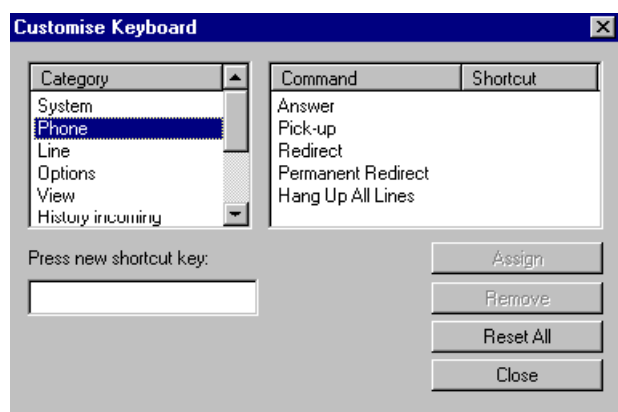
Customising Keyboard Shortcuts

You can customize the keyboard shortcuts used by the various commands in CRM.phone.

Note: Keyboard shortcuts are not available in Aurea CRM web.

To define a keyboard shortcut:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select **Options > Customize Keyboard...** from the menu.
3. The **Customize Keyboard** dialog box opens:



4. Select a category.

A list of commands in the selected category are listed under **Command**.

5. Select a command.

6. Click in the **Press new shortcut key** field.

7. Enter the shortcut to be used for this command.

The shortcut is displayed in the text field. If the shortcut has already been assigned to another command, this is also displayed.

8. Click on **Assign** to assign the shortcut to the command.

9. Click on **Close**.

To remove a shortcut:

1. Open the **Customize Keyboard** dialog box.

2. Select the shortcut you wish to remove and click on **Remove**.

3. Click on **Reset All** to remove **all** shortcuts.

4. Close the dialog box.

CRM.phone Keyboard Shortcuts in Aurea CRM win and Aurea CRM web

You can use keyboard shortcuts with CRM.phone in Aurea CRM win and Aurea CRM web.

The shortcuts are not active if an Aurea CRM dialog box or the CRM.phone toolbar has focus.

If the same keyboard shortcut is defined for both CRM.phone and Aurea CRM win or Aurea CRM web:

- CRM.phone shortcuts take precedence over Aurea CRM win shortcuts
- A message is displayed in Aurea CRM web in this case

Microsoft Internet Explorer's keyboard shortcuts take precedence over Aurea CRM shortcuts.

History Options

The **History** menu contains several options for configuring the call history.

Filter incoming and outgoing calls

To filter incoming and outgoing calls:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select either **Incoming Call Status** or **Outgoing Call Status** from the **History** menu.
3. Enable or disable the options in the sub menu to define which calls are included in the history.
 - **Success**
 - **No Answer**
 - **Busy** (only outgoing calls)
 - **Redirected** (only incoming calls)
 - **Invalid Number**
 - **Transferred**
 - **Unknown Number** (only incoming calls)

For example, if you remove the check next to the **No Answer** option, calls that are unanswered are no longer be displayed in the history. Calls already included are not removed from the history, however.

No duplicates

You can prevent duplicates, i.e. calls from the same number and with the same status, from being added to the history.

To prevent duplicates:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select **History > No Duplicates** from the menu to enable the option.

If this option is enabled, duplicates are removed from history. For each number and status, the current entry is only shown.

Deleting calls from the history

To remove entries from the call history in Aurea CRM win or Aurea CRM web:

1. Click on  (**History**). The call history is displayed in a separate dialog box.
2. Select the call you wish to remove.
3. Press Delete on the keyboard.

To delete entries from the history in the CRM.phone dialog box:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Highlight the entry you wish to delete.
3. Select **History > Delete** from the menu or press Del.

To delete the entire history, select **History > Delete All** from the menu.

Saving the History

To save your history in text format:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select **History > Save As** from the menu. The **Save As** dialog box is displayed.
3. Save the file under a meaningful name.

Exporting the History

To export the history to Excel:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select **History > Export > Excel** from the menu.

An Excel spreadsheet containing the entries in the history is opened.

3. Save the spreadsheet.

Additional Functions

Additional functions that are not part of CRM.phone are often required in call centers.

These may be functions supported by your telephone system or functions programmed internally by your company.

You can access additional functions using the **Add. Functions** button.

Note: Your administrator is responsible for determining which additional functions are available.

Resetting the Telephony Software

It is sometimes necessary to reset the telephony software, for example, if the connection with the telephone system is lost.

To reset the telephony software in Aurea CRM:

1. Click  (**Reset**).

To reset the telephony software in CRM.phone:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Click on  (**Reset**) or select **Options > Reset** from the menu.

The status bar at the bottom of the **update.phone** dialog window indicates that the software is being reset.

Sending Aurea CRM win to the Foreground

You can determine whether Aurea CRM win should be displayed after searching for telephone numbers in CRM.phone.

Note: This option is not available for Aurea CRM web.

To determine when Aurea CRM win is sent to the foreground:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Select **Options > Activate Aurea CRM win** from the menu.
3. Choose one of the following options from the sub-menu:
 - **Always:** Aurea CRM is always displayed after each search. If Aurea CRM is opened in the background, the corresponding entry in the taskbar flashes. If Aurea CRM is minimized, it is sent to the foreground.
 - **Any Hit:** Aurea CRM is displayed if any results are found in the database. These results can comprise several results or an exact match.
 - **Exact Hit:** Aurea CRM is displayed if a record is found that matches the search criterion exactly.
 - **Never:** Aurea CRM is never displayed.

Note: Corresponding CRM.phone tasks are carried out, even if Aurea CRM is not displayed. You can control the execution of tasks, see [Disabling Actions](#).

Switch to Aurea CRM

Learn to switch to Aurea CRM from CRM Phone and vice versa.

To send Aurea CRM to the foreground from the **CRM.phone** dialog box:

1. Select **Options > Switch to Aurea CRM win** in the **CRM.phone** dialog box.

Note: This option is not available for update.seven web.

Configuring the CRM.phone Dialog Box

You can configure the **CRM.phone** dialog box to display only those elements you need.

To configure the **CRM.phone** dialog box:

1. Click on  in Aurea CRM to open the **CRM.phone** dialog box.
2. Open the **View** menu.

The following options are available from the **View** menu:

- Tool Bar
- Line Info
- Dialing Block
- Phone Book
- History
- Status Bar

The two options Phone Book and History can also be accessed using buttons in the tool bar.

Sorting Entries

You can sort entries in the directory and call history by ascending or descending order. Entries are sorted numerically (phone number), alphabetically (name), chronologically (date/time) or by call duration.

To sort entries:

1. Click on the header of the column you wish to sort, for example the **Number** column.



Info	Number ▲
Carter Brian	123827
Lee Daniel	185003

The entries are sorted by ascending order, with the phone numbers with the lowest initial figures at the top of the list. The arrow in the column heading points upwards.

- Click the column header again to sort the entries by descending order.



Info	Number ▲
Wright Carol	996143
Walker Karen	984788

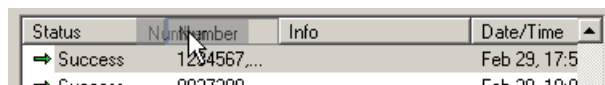
The arrow in the column heading points downwards.

Changing the Column Order

You can change the order of the columns in the directory and call history.

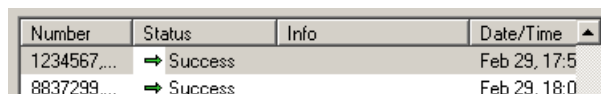
To change the order of the columns:

- Click on the column you wish to move and keep the mouse button pressed.
- Drag the cursor to the position you want the column to move to.



Status	Number	Info	Date/Time ▲
→ Success	1234567...		Feb 29, 17:5
→ Success	8837299...		Feb 29, 18:0

- Release the mouse button. The column is now displayed in its new position.

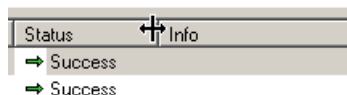


Number	Status	Info	Date/Time ▲
1234567...	→ Success		Feb 29, 17:5
8837299...	→ Success		Feb 29, 18:0

Changing the Column Width

To change the column width:

- Position the cursor over the separator between two columns, and click and drag the separator to the desired position.



Status	Info
→ Success	
→ Success	

- Release the mouse button at the desired position.

Switching between CRM.phone Profiles

Learn how to switch between CRM.phone profiles in CRM.win and CRM.web.

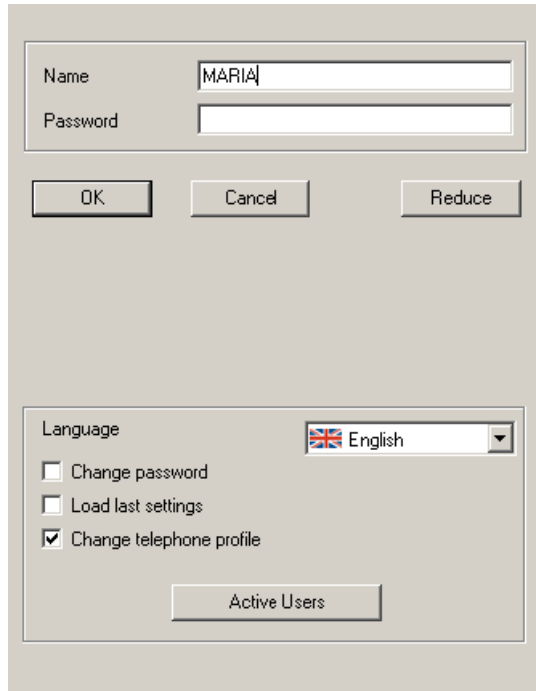
CRM.phone profiles are defined and assigned by your system administrator, see *CRM.phone Administrator Guide*. Further profiles can be assigned in addition to your standard telephone profile.

If you switch your telephone profile, the selected profile is used for the current session. The next time you log on to Aurea CRM, your default telephone profile is used.

Switching CRM.phone profile in Aurea CRM.win

To switch your CRM.phone profile in Aurea CRM win:

1. Start Aurea CRM win. The login window is displayed.
2. Click on **Expand**. The expanded dialog box is displayed.

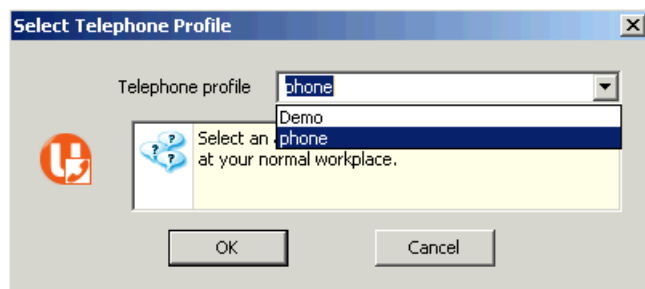
The image shows an expanded login dialog box for Aurea CRM. It has a light gray background. At the top, there are two input fields: 'Name' with the text 'MARIA' and 'Password' which is empty. Below these are three buttons: 'OK', 'Cancel', and 'Reduce'. In the lower section, there is a 'Language' dropdown menu showing 'English' with a small flag icon. Below the language menu are three checkboxes: 'Change password' (unchecked), 'Load last settings' (unchecked), and 'Change telephone profile' (checked). At the bottom of this section is a button labeled 'Active Users'.

Enable the **Change telephone profile** checkbox.

Note: If this checkbox is not available, you have either not been assigned a phone profile or CRM.phone is not installed. In this case, contact your system administrator.

3. Enter your user name and password.
4. Click on **OK**.

A dialog box is displayed from where you can select the desired profile.

The image shows a dialog box titled 'Select Telephone Profile'. It has a blue title bar with a close button. Inside, there is a 'Telephone profile' dropdown menu with 'phone' selected. Below the dropdown is a list box containing 'Demo' and 'phone', with 'phone' highlighted. To the left of the list box is a small icon of a person at a desk. Below the list box is a yellow text box that says 'Select any phone at your normal workplace.' At the bottom are 'OK' and 'Cancel' buttons.

5. Select the desired profile from the **Telephone profile** drop-down list.
6. Click on **OK**.

Aurea CRM is opened and CRM.phone now uses the selected profile.

Switching CRM.phone profile in Aurea CRM web

To switch your CRM.phone profile in Aurea CRM web:

1. Start Aurea CRM web. The login window is displayed.
2. Click on **More Options**. The expanded dialog box is displayed.

3. Enable the **Change Phone Profile** checkbox.

Note: If this checkbox is not available, either you have not been assigned a phone profile, CRM.phone is not installed, or the required entry in the `Configuration.xml` file does not exist. In this case, contact your system administrator.

4. Enter your user name and password.
5. Click on **Login**.

The **Select update.seven phone Profile** dialog box is displayed.

6. Select the desired telephone profile in the **CRM.phone Profile** drop-down list. The default value is **Do not show phone toolbar**.
7. Click **OK**.
8. Aurea CRM web is opened and CRM.phone now uses the selected profile.