CRM
INTEGRATION SYSTEMS

Welcome

To:

CallOnCRM
Seamless CRM & Phone Integration

For ACT! By Sage

Training Guide

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Purpose

Our purpose is to provide a road map to be followed during an actual LIVE demonstration of Call On CRM. We cover system requirements, registering as a user on www.calloncrm.com, installing, initializing and using all the major functions of the Call On CRM call control toolbar. Naturally, each participant is strongly encouraged to take notes and ask questions at any time.

So, here we go…

1) Registering on www.calloncrm.com as a Call On CRM user. Registering on the web site will allow you to download the latest and greatest version of Call On CRM, enable your free 14-day trial and purchase credits. CRMIS does not sell the software; we provide a service. Users simply purchase credits; one credit grants the right to use Call On CRM for one month.

- Point your browser to www.calloncrm.com
- Click on the Register link located on the upper right area of the home page.
- Fill in, at the very least, all the red-dot required fields. Be careful, the Security field is case sensitive.
- Finally, click on the Register link located at the bottom of the page.

2) Systems Requirements
- Server, desktop or laptop with at least 1 GB of memory running Windows Server 2003, Windows XP or Vista.
- Good Internet access: cable, DSL, ADSL, T1 with at least 1.5 MB down and .875 KB up.
- For Remote Office environment, QoS recommended.
- A BroadSoft based VoIP "Hosted PBX" telephone system.
- ACT! By Sage version 10 and up, Standard, Premium, Real Estate or Financial Professional.
- Basic ACT! knowledge assumed.

3) Call On ACT installation
- Logon www.calloncrm.com
- Click on Downloads.
- Then click on Download link on left side.
- Save to your hard drive.
- CLOSE ACT!
- Navigate and double click on the downloaded file.
- Double click on "setup.exe" file
- Answer all questions.
- Restart ACT! You should now see the call control tool bar ("CCTB") located near the top of the Contact Detail display.

4) Call On CRM Initialization

- Click on CCTB "Settings". The Call On CRM Settings dialogue box opens.
- To connect to the BroadSoft platform, you must enter the information provided by your phone company in Account Settings and Connection. Note: Automatically, you will be setup for a 14-day trial. Click on Licensing to verify. There are 11 Call On CRM settings on the left-hand side:
- Use ACT! Preferences to adjust ACT! behavior such as Navigation to Contact, History Creation, Show All Call Log for missed calls, show History Dialogue box during call, Schedule Activity for Missed Calls.
- General Settings
- Call Log sets up Call Log maintenance
- Account Settings
- Connection
- Dialing Rules
- UI Preferences
- Licensing
- CallOnCRM Updates. Registered users will receive an e-mail on all updates.
- Log Settings for error reporting and monitoring.
- About Call On CRM

5) How to purchase credits.

- Login www.calloncrm.com
- Click on "Licensing" button. Then click on "Buy licensing credits" button on the left side.
- Click on Add to Cart selecting the desired product.
- Click on View Cart BEFORE clicking on Check Out if you are buying for more than 1 seat.
- Click on Check Out and enter all required information. ***You must use the SAME e-mail address you used to register on*** www.calloncrm.com.
- You are now ready to assign your new credits.

6) Call On CRM Call Control Tool bar

- The "CCTB" contains 18 components: icons, dropdown menus and call status display.
- Components functionality and status varies depending on call status: On or Off Hook, Call Conference, and Blind Call Transfer. Here they are, from left to right, on the "CCTB":

- 🌐 Globe icon, Connect as... or Disconnect
- 👥 Manage your Phone System Services icon
- <Dial Number> drop down menu automatically populated with last 10 call numbers. Here you can directly enter a number and dial.
- Phone fields drop down menu populated will all phone numbers on current contact.

- 📞 Redial icon
- ☎ Answer the Incoming Call icon
- 📞 Place the Call on Hold icon
- 📞 Transfer to Another Number drop down menu populated with all possible calls to transfer to in current contact.
- 📞 Transfer the Call to Voice Mail icon
- 📞 Start a Conference Call with Active Calls icon
- 📞 Release the Call icon or drop last connected call from Conference.
- Call Status Display with call duration timer displaying single or multiple lines.
- 🔵 Link, Un-link, Create Contact and Navigate to Contact drop down menu icon. The status of each function varies depending on call status.
- 👥 Lookup Contact Info icon. Click on the icon, the Reverse Lookup dialogue box appears. From various types of searches by Phone, by Person or by Company, you can pre-populate fields before creating a new contact. The Contact, Phone or Mobile and ID/Status fields must be populated before Create New Contact is active.
- 🗂 Record History icon. The Record History dialog box appears on demand or automatically during a call. From this box, during the call you can enter notes, attach files, and enter follow-up activities…..
- 📋 Show Log for All Call icon
- 📝 Settings Icon

- **CallOnCRM** Product Logo link to Help on
  www.calloncrm.com

7) Live Call demonstrations
- Click and dial
- In-coming call showing the Incoming Call toast on lower right corner of your screen.
- You can answer, transfer or reject calls directly from the toast.

8) Call Logs: All Call and Contact Log
- Both are formatted the same way.
- Each contact has its own call log.
- From the All Call Log you can navigate to contact.
- In Settings you can setup Log maintenance.

9) Click to Dial custom icon
- From Tools -> Design Layout -> Contact, you can insert, in your schema, Click to Dial icons for each phone field and extensions.
- For ease of use, assemble all your phone fields on your contact detail schema.

10) Best Practices
- If upgrading or reinstalling ACT!, you must first remove Call On CRM
- Large databases require Call Log maintenance.