AvePoint CallAssist 3.2.1 for Microsoft Dynamics® CRM

User Guide

Revision C

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Overview

CallAssist is an application used to retrieve entities' information and their columns from Dynamics CRM 2013 or Dynamics CRM 2011 by searching the Dynamics CRM database according to a user-entered keyword. Then, the user can use the searched information to make a call, create a phone call activity, send an e-mail, and open the entity in Dynamics CRM.

The entities and their columns from which information is retrieved depend upon what is configured in the CallAssist Admin Tool, which limits the scope of the entities and the columns that CallAssist is able to retrieve and use.

Refer to *CallAssist for Microsoft Dynamics® CRM Installation and Configuration Guide* for details on installing CallAssist and configuring the entities and their columns in the CallAssist Admin Tool.

*Note: CallAssist is supported on the following English Dynamics CRM environments: Dynamics CRM 2011 Online, Dynamics CRM 2011 RTM, Dynamics CRM 2011 UR14, and Dynamics CRM 2013 Online and On-Premises.

Signing in

Double-click the **CallAssist** shortcut on the desktop. If your credentials are configured already, the username and the password appear automatically on the login interface. Otherwise, enter your credentials.
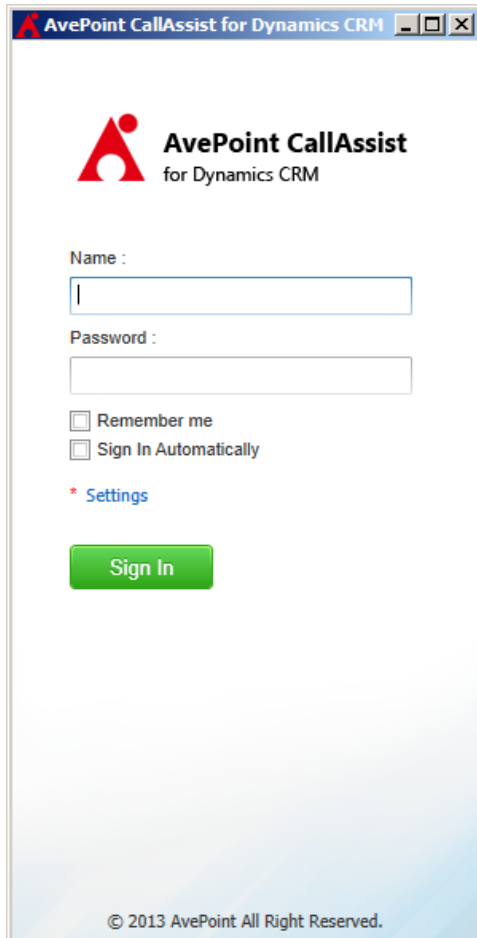

Figure 1: Login interface

On the login interface, you can perform the following actions:

- Select the **Remember me** checkbox to allow CallAssist to remember the username and the password.

- Select the **Sign In Automatically** checkbox to sign in automatically when you start CallAssist.

- Click **Settings** to configure CallAssist settings. For detailed information on configuring CallAssist Settings, please refer to AvePoint CallAssist for Microsoft Dynamics CRM Installation and Configuration Guide.

- Click **Sign In** to examine your credentials and to log into the application.

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Using CallAssist

Refer to the sections below for information on operating the CallAssist application.

Understanding the Menu Bar

In the menu bar, there are five drop-down options: **File**, **Conversation**, **Call**, **Tools**, and **Help**. They are introduced as follows.

File Menu

The File menu contains the following options:

- **Settings** – Click **Settings** to configure the CallAssist settings. For more information on configuring CallAssist Settings, refer to [AvePoint CallAssist for Microsoft Dynamics CRM Installation and Configuration Guide](#).
- **Sign Out** – Click **Sign Out** to sign out.
- **Exit** – Click **Exit** to exit the application.

Conversation Menu

The Conversation menu contains the following options. Select a record and then perform the following actions:

- **Log this Call** – Click **Log this Call** to create a phone call activity.
- **Open in CRM** – Click **Open in CRM** to open the entity in Dynamics CRM.
- **Send an E-mail** – Click **Send an E-mail** to send an e-mail when the e-mail address is set as the primary e-mail address.
- **Delete** – Click **Delete** to delete the selected record.

Call Menu

The Call menu contains the following options:

- **Call** – Select a record or the retrieved information and then click **Call** to dial the number.
- **Accept** – When there is an incoming call, click **Accept** to accept it.
- **Hang Up** –Click **Hang Up** to hang up the call.

Tools Menu

The Tools menu contains the following options:

- **Check for Update** – Click **Check for Update** to check for a CallAssist application update.

- **History** – Click **History**; the **Call History** pop-up window appears. You can perform the following actions.

    o Check the record's detailed information. The record's **State**, **Contact**, **Phone**, **Time**, and **Duration** are listed.

    o Use the **State** filter, the **Time** filter, or enter the key word in the **Phone Number or Name** field to search the desired records. The records which meet all configured filter criteria will be displayed in the blank area.

    o Select the records and click **Export** to export them to an Excel document (for archiving purposes, for example).

    o Select the records and click **Delete** to delete them from the history records.

Help Menu

The Help menu contains the following options:

- **About CallAssist** – Click **About CallAssist** to view the publisher, version, and copyright information.

- **Product Registration** – Click **Product Registration** to apply a license.

Understanding the Personal Information Area

The personal information area (as shown below) displays the user's name, avatar, and extension. Click the avatar area on the left to select a picture to use as the avatar. Click ⚙ on the right to configure CallAssist settings. Under the name, the provider information is displayed.

- If using ShoreTel as the TAPI provider, your telephone number is displayed under the full name.
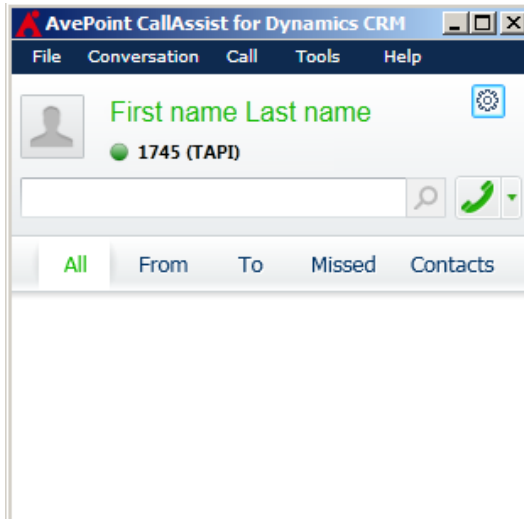

Figure 2: The telephone number is displayed when using ShoreTel as the TAPI provider.

- If using Skype as the provider, your Skype name is displayed.
- If using Lync as the provider, your Lync name is displayed.

Retrieving Record Information

The retrieve function searches for information in Dynamics CRM according to a keyword entered in CallAssist. Follow the steps below to use the retrieve function:

1. Enter a keyword in the blank field (marked in the screenshot below). Both the entity name and the contents contained in the specific columns that are configured in the **Entity Retrieve** area in **Advanced** tab can be used as keywords. Also, the wildcard "*" is supported. You can enter an asterisk (*) to stand for the character string of any length. You can also omit the following characters in the keyword when searching for the phone numbers: **- + # * ( )**. For example, you can find the phone number *(123)123-4567* with the keyword "1231234567".
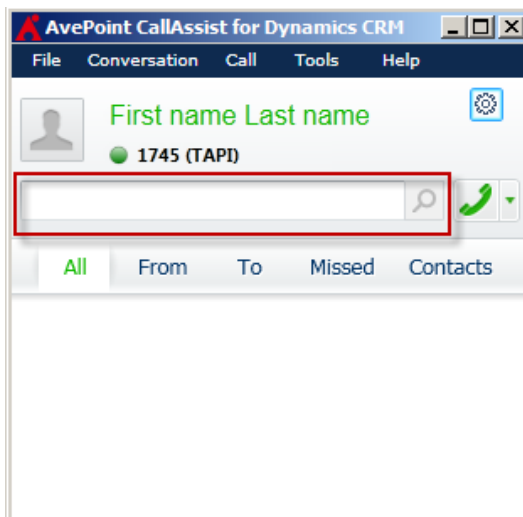

Figure 3: Entering the keyword in the blank field.

2. Click the search button (🔍) to start retrieving. The results will be displayed in the **Contacts** tab.

Dialing a Contact

To use the dialing function, follow the steps below:

1. Enter the phone number/Sky ID/ e-mail address according to your provider in the blank field (marked in the screenshot below).
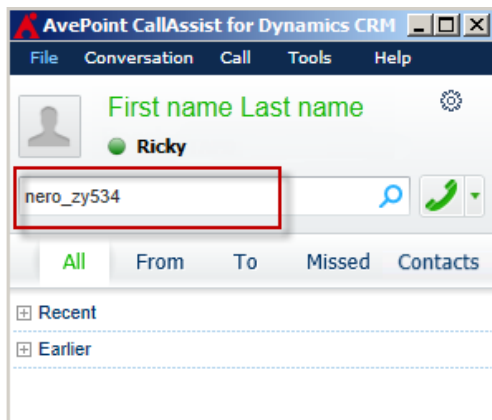

Figure 4: Entering the Skype ID when using Skype as the provider.

2. Click the dial key ( ) to make the phone call. If desired, click the triangle button ( ) next to the dial key ( ) to select a provider other than the default. Then CallAssist starts dialing using the default or selected provider. Note that when the **Contacts** tab is selected, the blank field is a search field, so outgoing calls cannot be made.

Besides, you can also use the dialing functions on the **All**, **From**, **To**, **Missed**, and **Contacts** tab as follows:

- Double-click the record or the retrieved information to start a call. This function is available when the **Start a call on Double-Click** checkbox in the **General** tab is selected. After double-clicking the record or retrieved information, the **Dialing Now** pop-up appears. This window displays the entity name, phone number, the 📞 button for hanging up, call duration, the ➕ button for creating a phone call activity, the ▦ button for displaying/hiding the keypad, and the keypad. Note the keypad can be displayed when using ShoreTel as the TAPI provider.
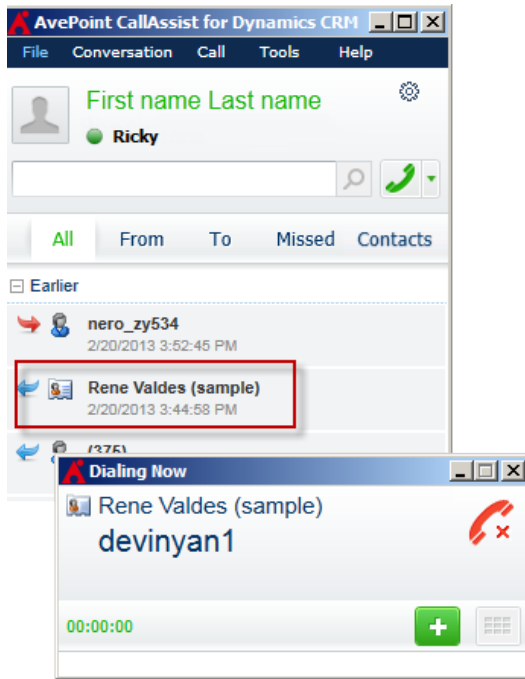

Figure 5: The Dialing Now pop-up window appears after double-clicking a record.

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- Hover over the record/retrieved information to display additional options. Click ![dial icon] to dial the number using the default provider; you can also click the triangle next to the dial key to select another provider.
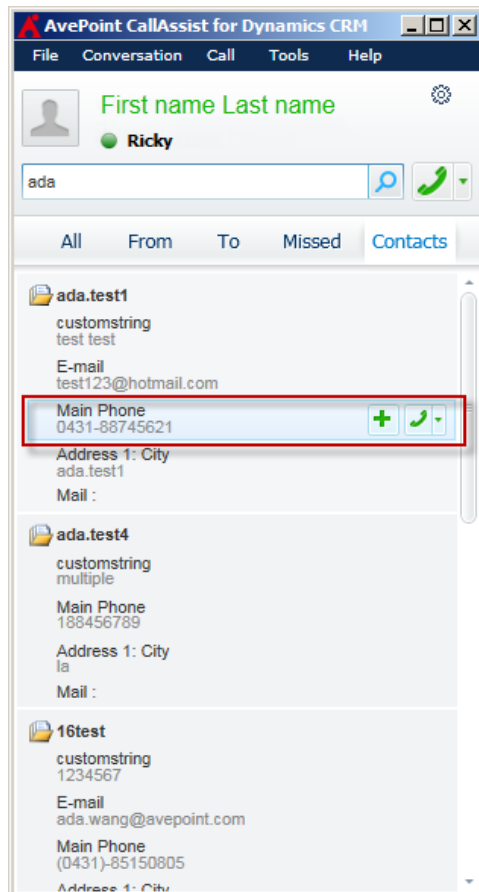

Figure 6: Hovering over the record to display addition options.

Creating a Phone Call Activity

The Create Phone Call Activity function allows you to create a new phone call activity while making a call or by clicking ![plus icon] on a specific pop-up window on the **All/From/To/Missed/Contacts** tab.

Creating a Phone Call Activity While Making a Call

When you make a call, CallAssist can create and log a phone call activity in Dynamics CRM according to what is configured in **Create a Phone Call Activity for each call** section in **CallAssist Admin Tool.**

- If you select the **Always** option, a pop-up window for creating a phone call activity appears when every call begins.

- If you select **Alert**, when you make a call, a pop-up window appears, asking you whether to create a phone call activity. If you choose **Yes** , the **Phone Call Activity** page appears and you can create a new phone call activity using this page.

To create a phone call activity using the **Phone Call Activity** page, refer to Creating a Phone Call Activity Using the Phone Call Activity Page in this guide.

Creating a Phone Call Activity on a Tab

To create a phone call activity on a tab, follow the instructions as follows:

1. On the **All**, **From**, **To**, **Missed**, or **Contacts** tab, hover over the record/retrieved information to display additional options.

    - On the **All**, **From**, **To**, and **Missed** tab, a pop-up window appears. Click ![+] on the pop-up to create a new phone call activity for this record.
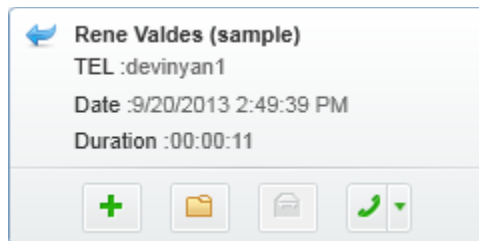

Figure 7: The pop-up window with addition options.

    - On the **Contacts** tab, click ![+] to create a new phone call activity.
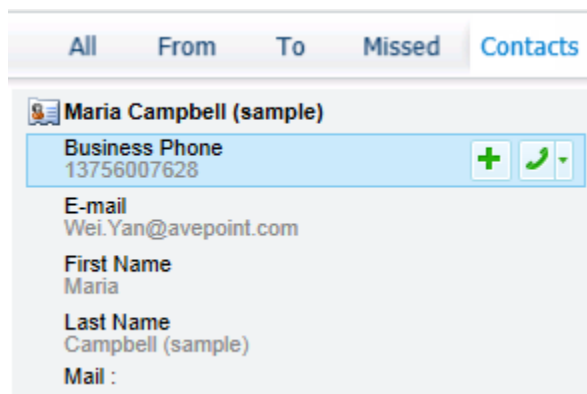

Figure 8: Addition options.

3. On the **Phone Call Activity** window, refer to the Creating a Phone Call Activity Using the Phone Call Activity Page section to create a phone call activity in your Dynamics CRM.

Creating a Phone Call Activity Using the Phone Call Activity Page

In the **Phone Call Activity** page, CallAssist automatically fills in the following information; this information cannot be edited: **Account**, **Sender**, **Recipient**, and **Phone Number**.

*Note: The **Recipient** and **Sender** fields of a phone call activity in Dynamics CRM are supported for the following four types of entities: Account, Lead, Contact, and User. When you create a phone call activity for a specified record of these four entity types, the **Recipient** and **Sender** fields display the record

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names. When you create a phone call activity for a specified record of any other entity type, the **Recipient** and **Sender** fields are blank.

To create a phone call activity, configure the following settings:

- **Direction** – Specify the direction of the phone call activity you are about to create.

    *Note: When you change the direction of the phone call activity, the **Recipient** and **Sender** will be switched with each other automatically.

- **Subject** – Enter the subject for the phone call activity you are about to create.

- **Description** – Enter the description for the phone call activity you are about to create. This option is optional.

- **Regarding** – Use ⬛ to select and link a record to the Phone Call Activity you are about to create. By default, the Recipient is automatically filled in this field.

- **Set As Complete** – Select this option to mark this activity as Completed in Dynamics CRM, when you get a result from this phone call. Then, this activity will be moved to the **Closed Activities** view in Dynamics CRM. If you do not get a result from this phone call, do not select this option. Then, this activity will be marked as Open in Dynamics CRM.

- **Create a New Task** – If you want to create a separate task from the phone call activity you are about to create, select this option and click **OK**. You will be brought to the **Task: New** page in Dynamics CRM to create a new task. The new task will help you track the things you need to get done.

Click **OK** to save the configuration and create this phone call activity in your Dynamics CRM.

Understanding the CallAssist Tabs

The five CallAssist tabs are described below.

- **All** – Displays all records, including incoming and outgoing calls.

- **From** – Displays received incoming calls.

- **To** – Displays outgoing calls.

- **Miss** – Displays missed incoming calls.

- **Contacts** – Displays search results after retrieving information from Dynamics CRM.

The following actions can be performed regardless of the selected tab:

- Hover over the record/retrieved information to display additional options. A pop-up window appears.

    o On the pop-up window, the entity name, telephone number, date, and call duration are displayed. Note that this function is not available on the **Contacts** tab. On this pop-up, click ➕ to create a phone call activity; click 📁 to open the entity on the Dynamics

CRM; click to send an e-mail (when the e-mail address information exists); or click the dial key to dial the number by the default provider. Click the triangle next to the dial key to select another provider.
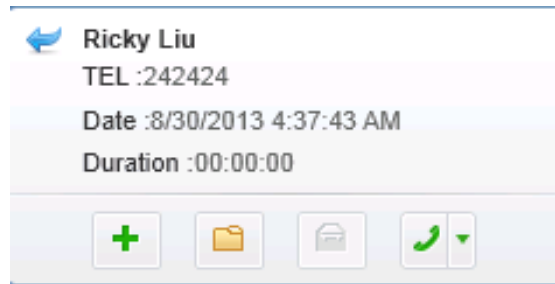

Figure 9: Buttons in the pop-up window.

- Right-click the record/retrieved information to display the following options:

    o **Call** – Click **Call** to dial the number.

    o **Log this Call** – Click **Log this Call** to create a phone call activity.

    o **Open in CRM** – Click **Open in CRM** to open the entity in Dynamics CRM.

    o **Send an E-mail** – Click **Send an E-mail** to open your system's default e-mail service. A blank e-mail with the contact's e-mail address in the **To** field appears (when the contact's e-mail address has been set as primary e-mail by the CallAssist Admin Tool). If the e-mail address has not been set as the primary e-mail address, you cannot send an e-mail by clicking **Send an E-mail**.

    o **Delete** – Click **Delete** to delete the selected record.

Handling Incoming Calls

When a call is incoming, a pop-up window appears displaying the information configured in **Inquiry Rules** in **Advanced** tab. Click **Accept** to accept the incoming call or click **Hang Up** to decline it. The phone call activity will be created according to the configured **Control Settings** in **General** tab.
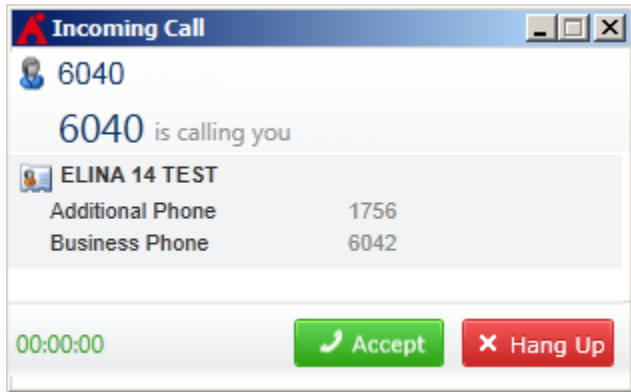

Figure 10: Incoming Call pop-up window.

Transferring Record Information from Dynamics CRM to CallAssist

Call Numbers is used to transfer record information from Dynamics CRM to CallAssist. Only the entities and columns you configured in CallAssist Admin Tool can be transferred to CallAssist. Follow the steps below to use Call Numbers.

1. Log on to your Dynamics CRM environment and go to the list of the entity which you have set in the CallAssist Admin Tool.
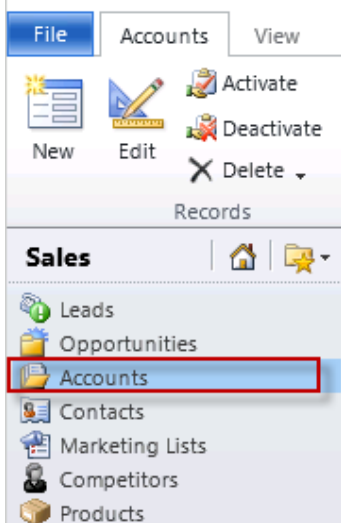

Figure 11: Going to the list of the entity which you have set in the CallAssist Admin Tool.

2. Select the records from the list and then click **Call Numbers**.
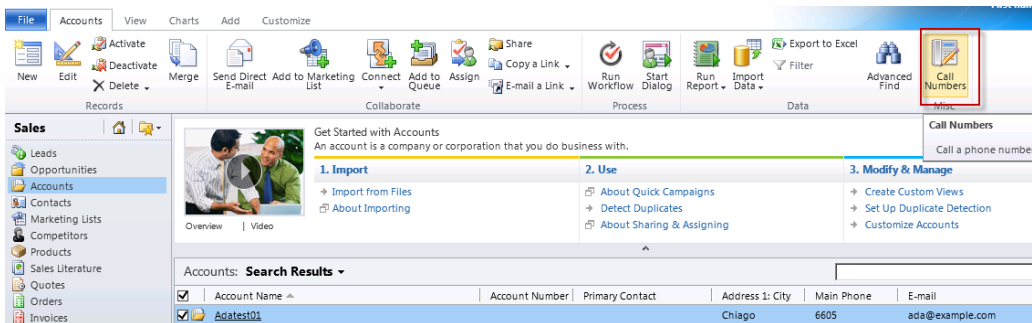
Figure 12: Selecting the specific entity from the list.

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3. The information of the selected records will be transferred to the **Contacts** tab of CallAssist as shown below.
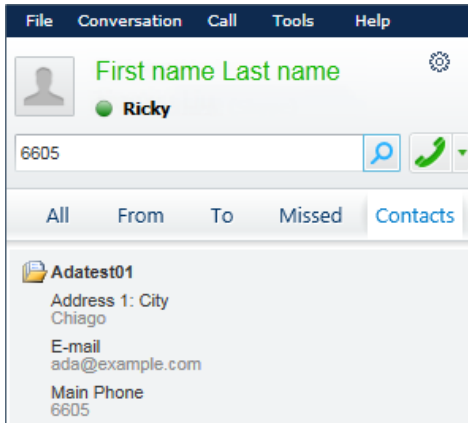

Figure 13: The information is transferred to CallAssist.

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