Administrator Guide for Microsoft Dynamics
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Chapter 1:
About Vertical CRMLink

Vertical CRMLink overview
Vertical CRMLink connects Wave ViewPoint users with popular customer relationship management (CRM) products. CRMLink is a cloud-based service that connects to Vertical Wave IP, and is designed to be easy to use and easy to administer.

Vertical CRMLink:

- Includes CRMLink Desktop, an easy-to-use desktop client that presents screen pops to agents.
- Logs all calls to your CRM in real-time based on filtering rules tailored to your organization.
- Supports mobile calls through the ViewPoint Mobile Client.
- Supports management reports on data using CRM reporting.

Supported CRM products
The following CRMs are supported:

- NetSuite CRM
- SalesForce:
  - Salesforce1 Professional
  - Salesforce1 Enterprise
  - Salesforce1 Unlimited.
  The API option must be enabled for all versions.
- Microsoft Dynamics CRM Online
- ELEAD CRM

This guide describes how to install, configure, deploy and use Vertical CRMLink with Microsoft Dynamics.
Requirements

Wave requirements

- **Wave version:** Wave IP 4.5 or higher is required on each Wave.
- **Network access:** Each Wave on customer premises must be accessible from the public Internet.
- **Wave WCAPI port number:** In order to add Waves to CRMLink, you need to know the Wave WCAPI port for each Wave. Your Wave administrator can provide you with this information.
  
  The default WCAPI port on each Wave is 50070, but this may have been changed to meet specific network or firewall requirements, for example:
  
  - The local Wave administrator may have changed the WCAPI port to another port.
  - The local network administrator may have forwarded this port to another port number in the router or firewall.

- Each CRMLink Desktop user on the Wave must have a ViewPoint account (user ID and password).

User desktop requirements

- **Microsoft Windows:** Windows 7 or higher with current Internet Explorer is required on each user’s desktop
- **Network access:** Each user’s desktop must be able to connect to https://crmlink.vertical.com

License requirements

- **User licenses:** One CRMLink license is required for each user. CRMLink licenses are specific to the CRM that you are using.
- **Vertical Online Licenses account:** You purchase CRMLink licenses via Vertical Online Licenses (VOL). The first time you access VOL, you must create an account. You use this account as a “single sign on” (SSO) in VOL to purchase licenses, view your license summary, and perform administrator tasks for CRMLink.
- **Cookies** must be enabled in your browser in order for the single sign on (SSO) in VOL to work.
- **Dealer code:** You enter a dealer code when you purchase Vertical licenses, as described in Chapter 2. This code is used to associate a customer with a dealer and to calculate commissions.
  
  - If you are a dealer purchasing licenses for a customer, this is the Customer Number from your Vertical invoice.
  
  - If you are purchasing your own licenses, contact your dealer to get the correct dealer code to use.
Vertical CRMLink documentation

This Vertical CRMLink Administrator Guide provides you with all the information you need to:

- Obtain CRMLink licenses.
- Add Waves and Wave users to CRMLink.
- Create templates to manage call matching rules and popup settings.
- Obtain and distribute the CRMLink installation link for users.
- Install and use CRMLink Desktop.
- Customize CRMLink Desktop, including changing the CRMLink Desktop start-up behavior and password, and modifying call matching rules and popup settings.

For answers to commonly-asked questions see:

- Chapter 7, “CRMLink Administrator FAQ”
- Chapter 8, “CRMLink Desktop FAQ”

The examples shown in this guide are for explanatory purposes only. Your own data will vary.

The Vertical CRMLink Desktop User Guide tells users how to:

- Install CRMLink Desktop
- Use CRMLink Desktop
- Customize CRMLink Desktop:
  - Change CRMLink Desktop start-up behavior and password
  - Modify call matching rules and popup settings, if allowed
Chapter 2: Registering and Obtaining Licenses

This chapter describes how to:

- Obtain licenses, including accessing Vertical Online Licenses (VOL), creating a VOL account, and purchasing licenses. See page 8.
- Launch CRMLink. See page 11.
- Navigate CRMLink. See page 13.

Obtaining CRMLink licenses

1. Go to Vertical Online Licenses at:

   http://shopping.netsuite.com/s.nl?c=832854
2. If you already have a VOL account, click **Login**. If you have not yet created your SSO account, click **Register** at the upper right.

3. Enter the following information to create a new account:
   - **Name** of the person who will act as the CRMLink administrator. Typically, the person who purchases the CRMLink licenses here will also perform CRMLINK administrator tasks.
   - **Email Address** for the CRMLink administrator.
   - **Password** for the CRMLink administrator.
   - **Password Hint**: *Optional*. Hint that will help you to remember your password.
   - **Dealer Code**: *Optional*. If you are a dealer purchasing licenses for a customer, enter the Customer Number from your Vertical invoice. If you are purchasing your own licenses, contact your dealer to obtain the correct dealer code to use.

   It is important to enter this field—although it is optional—so that Vertical knows who is servicing your account. It is also used when calculating dealer commissions.

   - Click **Continue** to return to the VOL main screen. From there, you can click **My Account** to view details about your account.
4. Click Add Licenses.

5. Select the **Type of License** for your CRM. The following license types are supported in the current version:

<table>
<thead>
<tr>
<th>Type of License</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRMLINK-NETSUITE</td>
<td>Standard license for NetSuite users. Cost is $10/month per user.</td>
</tr>
<tr>
<td>CRMLINK-NETSUITE-TRIAL</td>
<td>90-day free trial for NetSuite users. Automatically converts to a Standard license after the trial period elapses.</td>
</tr>
<tr>
<td>CRMLINK-SALESFORCE</td>
<td>Standard license for SalesForce users. Cost is $10/month per user.</td>
</tr>
<tr>
<td>CRMLINK-SALESFORCE-TRIAL</td>
<td>90-day free trial for SalesForce users. Automatically converts to a Standard license after the trial period elapses.</td>
</tr>
<tr>
<td>CRMLINK-MSDYNAMICS</td>
<td>Standard license for Microsoft Dynamics users. Cost is $10/month per user.</td>
</tr>
<tr>
<td>CRMLINK-MSDYNAMICS-TRIAL</td>
<td>90-day free trial for Microsoft Dynamics users. Automatically converts to a Standard license after the trial period elapses.</td>
</tr>
<tr>
<td>CRMLINK-ELEAD</td>
<td>Standard license for ELEAD users. Cost is $10/month per user.</td>
</tr>
<tr>
<td>CRMLINK-ELEAD-TRIAL</td>
<td>90-day free trial for ELEAD users. Automatically converts to a Standard license after the trial period elapses.</td>
</tr>
</tbody>
</table>
6. Enter the Number of licenses to purchase. (You can go back at any time before submitting your order to increase or decrease the license count.)

7. Click **Checkout**.

8. Confirm the purchase order, make any necessary changes, and then click **Proceed to Checkout**.

9. Complete your purchase and then click **Submit Order**.

10. Click **CRMLink** to go back to the Vertical Online Licenses main screen.

**Launching CRMLink**

On the Vertical Online Licenses main screen, click **Product Administration**.
The CRMLink Dashboard opens.

When you launch CRMLink Product Administration for the first time, only the toolbar buttons and other screen controls will be visible in the Dashboard.

Once you have successfully added Waves and Wave users to CRMLink (as described in the following chapters), each Wave and its associated CRM will be listed in the Dashboard. Licensing information is displayed for each Wave:
A green or red circle indicates the status of the Wave and its associated CRM:

- **Green**: In a good state. Wave or CRM is running and reachable. License count is adequate.
- **Red**: In an error state. Wave or CRM is not running or not reachable. License count is insufficient.

You can filter this screen to focus on specific error conditions:

- Click **Wave Down** to show only those Waves that are not reachable.
- Click **CRM Down** to show only those CRMs that are not reachable.
- Click **Other Errors** to show all other errors.
- Click **Reset** to inactivate the selected filter and show all Waves.

**Navigating CRMLink**

Click **Home** at any point to return to the CRMLink Dashboard.

From the Dashboard:

- Click **Settings** and then choose one of the following:
  - **Event Log**: View errors reported for your CRMLink service.
  - **User Management**: Add, edit, or delete a CRMLink administrator user.
  - **My Profile**: Manage your own user profile.
  - **Help**: Open a copy of this guide.
  - **Logout** from CRMLink.
- Click **Add Wave** to add another Wave to CRMLink.
- Click **View Licenses** to see how many CRMLink licenses have been purchased and allotted.
Click a Wave to show details about that Wave, add users on that Wave to CRMLink, and so forth.

**Where to go next**

The next step is to add your Waves and Wave users. Go to the next chapter.
Chapter 3:  
CRMLink Administrator Tasks for Microsoft Dynamics CRM

This chapter describes how to perform the following tasks in Vertical CRMLink:

- Add each Wave to CRMLink. See page 15.
- Add Microsoft Dynamics users to CRMLink. See page 17.

The following steps need to be performed in Microsoft Dynamics by your Microsoft Dynamics administrator:

- Set up Click-to-Call for Microsoft Dynamics users. See page 22.

Adding each Wave to CRMLink

Perform the steps in this section for each Wave that has local users who will use CRMLink.

To add a Wave to CRMLink

1. In the CRMLink Dashboard, click Add Wave.
2. In Basic Settings:
   - Enter a name for the Wave. You do not need to enter the following field, **Wave Unique Name**, because it will be automatically filled in once the Wave is successfully added.
   - Select “MSDynamics” from the **CRM** drop-down list.

3. Enter the following Advanced Settings. All of the following fields are required unless otherwise noted.
   - **Wave Address**: Wave’s Public IP address or Hostname. This address must be accessible externally by CRMLink.
   - **Wave Port**: Enter the Wave WCAPI port, provided by your Wave administrator. The default WCAPI port is 50070, but this may have been changed on this Wave. See “Wave requirements” on page 6 for details.
   - **Wave User Name**: ViewPoint user ID for the user who will act as the CRMLink administrator.
- **Wave Password:** ViewPoint password for that user.
- **Custom CRM Url:** Optional. Some versions of Internet Explorer (IE11, for example) work best when this field is populated. Enter the URL used to manually access Microsoft Dynamics, for example https://verticalcomm.crm.dynamics.com
- **CRM User Name:** Microsoft Dynamics login ID for the user who will act as the CRMLink administrator.
- **CRM Password:** Microsoft Dynamics password for the CRMLink administrator.
- **Organization Unique Name:** Microsoft Dynamics identifier for your organization, for example VerticalComm.
- **Allow Click-to-Call:** Optional. Enables CRMLink Desktop’s Click-to-Call feature. See page 22 for more information.

4. Click **Save**. If your settings are saved successfully, green dots will be displayed next to the **Wave** and **CRM** fields.

### Adding Microsoft Dynamics users to CRMLink

Once your Waves have successfully connected to CRMLink, each one will be listed on the CRMLink main screen. You are now ready to add Microsoft Dynamics users from each Wave to CRMLink. You can add users in two ways:

- **Add Microsoft Dynamics users individually** from a list of users on a selected Wave, as described below. With this method, you must supply additional information for each user, so it can be more time-consuming. You must have CRMLink administrator rights to add users this way.

- **Add Microsoft Dynamics users in bulk** via a comma-separated values (CSV) file. With this method, you supply all of the required information for a user in the CSV file. Although you must have CRMLink administrator rights to actually import the CSV file, anyone can enter the user information to prepare the CSV file. See page 20 for details.

### Adding Microsoft Dynamics users individually

**To add Microsoft Dynamics users to CRMLink individually**

1. In the CRMLink Dashboard, click the Wave whose users you want to add to CRMLink.

2. Click the **Manage** users button.
3. In the Manage Users screen, click **Refresh Wave Users**.

   The list of registered Wave users is displayed at the bottom left of the screen, and any users who have been added to CRMLink at the right. (If you just added this Wave to CRMLink, there will not be any users listed on the right.)

   To refresh the Wave Users list at any time to show the latest additions, changes, or deletions, click **Refresh Wave Users** again.

4. Select the checkbox next to each Wave user who you want to add to CRMLink.

5. Click the **right arrow** to move all of the selected Wave users to the CRMLink Users list.
6. The Import Users screen opens automatically. Click the **Edit** button for a user to enter or change the CRM information for that user.

![Import Users screen](image)

7. For each Microsoft Dynamics user, enter the following:
   - **Wave User ID:** User’s ViewPoint user ID, supplied automatically by Wave.
   - **Wave Password:** User’s ViewPoint password. If you do not know it, leave blank. Each user can enter his or her password during CRMLink Desktop installation.
   - **CRM User ID:** Microsoft Dynamics login id for this user.
   - **CRM Password:** Microsoft Dynamics login password for this user. If you do not know it, leave blank. Each user can enter his or her password during CRMLink Desktop installation.

8. Click **+** to save the user’s information.

9. Repeat for each user, and then click **X** to exit Import Users.
Adding Microsoft Dynamics users in bulk

You can import Wave users to CRMLink in bulk via a comma-separated values (CSV) file.

IMPORTANT! These users must already exist on the Wave in question—you will get an error if you import a CSV file that contains any users who are not on that Wave.

**Formatting the Import CRMLink users CSV file**

A CRMLink user import file consists of one header row followed by one row per user.

- Row 1 will not be processed during the import. You can leave Row 1 blank, or optionally enter the column headings in the following order, which may make the file easier to work with:

```
FirstName,LastName,Extension,VPDPassword,CRMLinkUser?,CRMUserID,CRMPassword,SecurityToken
```

- Each subsequent row represents one user to be added to CRMLink. For each user, the data fields must be in the order indicated in Row 1. There are 8 fields in each row:
  - **FirstName.** User’s first name.
  - **LastName.** User’s last name.
  - **Extension.** User’s Wave extension.
  - **VPDPassword.** User’s ViewPoint password. If you do not know it, leave blank. Each user can enter his or her password during CRMLink Desktop installation.
  - **CRMLinkUser?** Enter ‘y’ or ‘yes’ if the user is using CRMLink, ‘n’ or ‘no’ if not using CRMLink.
  - **CRMUserID.** User’s Microsoft Dynamics login id.
  - **CRMPassword.** User’s Microsoft Dynamics login password. If you do not know it, leave blank. Each user can enter his or her password during CRMLink Desktop installation.
  - **SecurityToken.** Leave blank - not required for Microsoft Dynamics users.

Each field is separated from the next field by a comma.

- Commas are not permitted in the contents of any field, because that will cause subsequent fields in that row to be interpreted incorrectly.
- If you omit a field for a user, you must enter a comma as a placeholder for that column. In this case, CRMLink will automatically apply the default value for that field.
- You do not need to enter trailing commas to indicate one or more omitted fields at the end of a row.
A sample CSV file to import Microsoft Dynamics users might look like this:

```
FirstName,LastName,Extension,VPDPassword,CRMLinkUser?,CRMUserID,CRMPassword,SecurityToken
Bob,Allen,2951,1234,yes,ballen@vertical.com,123456
Marie,Toussaint,2801,5678,yes,mtoussaint@vertical.com,987654
Kyle,Scott,2631,9012,no
```

Note that while the SecurityToken field is listed in the header row, none of the data rows contain a security token, because that field is not required for Microsoft Dynamics users.

In this example, Kyle Scott is not currently using CRMLink, so no CRM information is provided for him.

**To prepare a CSV file for importing**

1. In Microsoft Excel or a text editor such as Notepad, create a new file.
2. Leave Row 1 blank or enter the fieldnames listed above, separated by commas.
3. Starting in Row 2, add each user to be imported as a separate row, and enter the appropriate information for each column.
4. Save the file with a .csv extension.

**To import Microsoft Dynamics users via a CSV file**

1. In the Manage Users screen, click **Import CRMLink Users from File**.

2. Browse to the location of the CSV file that you prepared and select it.
3. Close the window and return to the previous screen.

   If there are any errors with the CSV file, for example a specified user does not existing on the Wave in question, the error will be displayed on-screen. If no errors are shown, the import was successful.
Setting up CRMLink Click-to-Call for Microsoft Dynamics users

With Click-to-Call, Microsoft Dynamics users can:

- Make a call by clicking on the phone icon or underlined phone number in CRMLink Desktop.
- End a call and begin a new call by clicking the next phone number or its phone icon.

Enabling CRMLink Click-to-Call via the CRMLink Dashboard

When you add each Wave to CRMLink as described earlier in this chapter, select the Allow Click-to-Call checkbox to enable the feature on that Wave.

Configuring CRMLink Click-to-Call in Microsoft Dynamics

You need to set Microsoft Dynamics to make calls with Lync according to the following steps. These steps must be performed in Microsoft Dynamics by your Microsoft Dynamics administrator. See the following for more information:


IMPORTANT! The instructions in this section assume that you have Microsoft Dynamics administrator rights and understand how to perform administrator tasks. Only the steps needed to configure CRMLink Click-to-Call are described in detail. For more information about Microsoft Dynamics administration, see your Microsoft Dynamics documentation.
**To set up Click-to-Call in Microsoft Dynamics**

1. Make sure you have the System Administrator security role or equivalent permissions in Microsoft Dynamics CRM.

2. On the nav bar, click or tap **Microsoft Dynamics CRM** to access the main menu and then click **Settings**.

3. From the Settings menu, select **Administration**.

4. On the Administration screen, click **System Settings**.
5. On the General tab, under **Set the telephony provider**, for **Select provider for Click to call**, select **Lync**.

![System Settings](image)

6. Click or tap OK.

**Where to go next**

The next step is to create templates to manage call matching rules and popup settings. Go to the next chapter.
Chapter 4: Working with Templates

This chapter describes how to:

- Manage templates. See page 26.
- Create templates. See page 27.
- Apply templates to CRMLink users. See page 30.

About templates

Templates allow the CRMLink administrator to create a set of pre-selected popup rules for users. By default each user can then modify his or her own matching rules and popup settings, or you can require users to only use the rules that you set up. By defining multiple templates, you can provide custom match rules and popup settings for different types of users.

About match rules and popup settings

Match rules determine what popup information is presented to CRMLink Desktop users on a CRM call.

- CRMLink match rules fire in order from top to bottom in the list that you define according to the steps in this chapter. The popup settings for the first rule that matches the call data will be used to present popup information to the user.
- There must be at least one match rule in the list. This rule should match where most of your caller data is stored. A common setting for this rule is:

  When: All Calls
  Matches Exactly: [blank]
  Then Look For: Caller ID Number
  In CRM Record: Customer
  In CRM Field: Phone

- The last rule in the list is used if all of the other rules fail to make a match. Settings for the first two fields on this last rule must be:

  When: All Calls
  Matches Exactly: [blank]

- For all other rules, you use the other available fields to specify the specific Wave and CRM information used for matching a call to an entry in your CRM.
Managing templates

1. In the CRMLink Dashboard, click the Wave whose templates you want to manage.
2. Click **Configure**. The Configure Template screen opens showing any templates created so far:

In the Configure Templates screen, you can do the following.

- Add a new template.
- Delete a template.
- Modify a template’s popup and match rules.
- Lock a template to prevent CRMLink users from making changes to the template rules.

See the next sections for details.
Creating a template

1. In the Configure Templates screen, click to add a new template. An empty row is added to the list of templates.

2. Click to edit the template name and lock setting.

3. Enter a CRM Name for the template.

4. Select the No End-User Edit checkbox to lock the template and prevent CRMLink Desktop users from making changes to the rules for this template.

   If this checkbox is not selected, the template is unlocked and CRMLink Desktop users to whom this template is applied can edit their own settings. Their changes will not modify the template or affect the settings for other CRMLink Desktop users. Note that if a user edits his or her own settings, that user’s status displayed in the Product Administration site will be “Custom”.

5. Click the Checkmark button to save your changes.
6. Click the **Gear** button to define match rules and popup settings for the template. The Call **Rules** screen opens:

7. To specify the Wave call data that this rule applies to, use the following fields:
   - **When**: Select a Wave field to match on from the drop-down list, or use the default value “All Calls”.
   - **Matches Exactly**: Optional. Enter the exact value to match on, for example the DID number used.

8. Specify where in Microsoft Dynamics Wave should look for matches using the following 3 criteria:
   - **Then Look For**: Select a Wave field associated with the call, for example “Caller ID Number”.
   - **In CRM Record**: Select the Microsoft Dynamics record to match on from the drop-down list, for example “Customer”.
   - **In CRM Field**: Select the Microsoft Dynamics field in that record to match on from the drop-down list, for example “Business Phone”.

9. Click **Popup Settings**. You should set popup settings for each rule, otherwise the default setting will be used.

   - **For This Type Of Call**: Specify if the rule applies to all calls or inbound-only or outbound-only calls.

   - **Perform This Action**: Specify what should popup when a call match is found:
     - **Pop CRM With**: When you choose this option, Microsoft Dynamics and CRMLink Desktop are both launched. Choose one of the following from the drop-down list:
       - Matching Phone Call Activity: A new call log / task is opened.
       - Matching Record: The record (for example, the Customer record) that matches the call data is opened. If no match found, a new record of the same type is opened with fields pre-filled as available.

       - Select whether the popup opens when the **Call First Rings**, when the **Call Is Answered**, or when the **Call Is Over**.

     - **Pop Alert Box Only And Display**:
       - Account Num: Choose up to 3 fields from the matched record to display in the popup. If no match is found, Caller ID is displayed.

     - **Pop Nothing**: When you choose this option, neither Microsoft Dynamics nor CRMLink Desktop is launched. Choosing this option does not affect CRM activity logging.

     - **Always Log a Call Activity Record To CRM**: Select this checkbox so that even when a user’s computer is powered down, CRM activity logs will still be generated.
10. Use the buttons in the **Priority** column to change the order of the rules. Rules are processed from top to bottom. Click **Delete** to delete the selected rule.

11. Click **Save** to return to the Call Rules screen. Click **Save** to save the new rule, or click **Add Rule** to add another rule.

12. When you are done, click the X button to return to the System View, showing all of the users for this Wave.

**Applying templates to CRMLink users**

Once you have created templates, you can assign them to users.

- A user can only have one assigned template.
- If you did not lock a template (by leaving the **No End-User Edit** checkbox unchecked when you created the template) CRMLink Desktop users to whom this template is applied can edit their own settings. Their changes will not modify the template or affect the settings for other CRMLink Desktop users. Note that if a user edits his or her own settings, that user’s status displayed in the Product Administration site will be “Custom”.

1. In the CRMLink Dashboard, click the Wave to whose users you want to apply template(s).

2. Select a template from the **Templates** drop-down list.

3. Select all of the users who will use the selected template.

4. Click **Assign**.
Where to go next

The next step is to download and distribute the CRMLink Desktop installation link to users. Go to the next chapter.
Chapter 5: Distributing CRMLink Desktop to users

This chapter describes how to obtain the CRMLink Desktop installation link and distribute it to users.

Obtaining and distributing CRMLink Desktop to users

Before users can begin to use CRMLink Desktop, you must download the CRMLink installation link for each Wave, and then distribute the appropriate link to users on each Wave.

**IMPORTANT!** The CRMLink Desktop installation link is Wave-specific, and is only valid for users on the Wave where the link is obtained.

If you added multiple Waves to CRMLink, you must perform the following steps for each Wave.

**To obtain and distribute the CRMLink Desktop installation link**

1. In the CRMLink Dashboard, click the Wave whose installation link you want to download.

2. Right-click the **Download CRMLink Desktop** button and then choose **Copy shortcut**.

3. Paste the CRMLink installation URL into an e-mail and send it to each Wave user who needs to use CRMLink Desktop.

**IMPORTANT!** The download link for each Wave/CRM is unique. If you have multiple Waves, make sure that you send the correct download link to each user who needs to install and use CRMLink Desktop.
Where to go next

For details on how to install, launch, and use CRMLink Desktop, see the next chapter.
Chapter 6: Installing and using CRMLink Desktop

This chapter describes how to:

- Install CRMLink Desktop. See page 34.
- Launch CRMLink Desktop. See page 36.
- Use CRMLink Desktop. See page 38.
- Customize CRMLink Desktop start-up behavior and your CRMLink Desktop password. See page 40.
- Change call matching rules and popup settings. See page 41.

For answers to commonly-asked questions, see Chapter 8, “Installing and uninstalling CRMLink Desktop”, starting on page 48.

Installing CRMLink Desktop

Install CRMLink Desktop on the computer of each Wave ViewPoint user who needs to use it.

Windows administrative privileges are required to install CRMLink Desktop. If the user does not have administrative privileges, the CRMLink administrator can perform the installation for the user.

**IMPORTANT! You need to provide the user’s ViewPoint user name and password during the installation. This is the same user ID and password that he or she uses to log into ViewPoint.**

**To install CRMLink Desktop**

1. Click the link provided by the CRMLink administrator to start the Setup Wizard. This step downloads the CRMLink Desktop installer program (CRMLinkDesktopSetup.exe) to your Downloads folder.
2. Click **Run** to launch the Setup Wizard if you are prompted to do so.
3. Follow the prompts and click **Next** at each screen to continue, accepting the default settings.
4. In the Configure CRMLink Desktop screen, enter your **ViewPoint User Name** and **ViewPoint Password**.
5. Click **Verify ViewPoint Credentials**.

6. Your **CRM User ID** and **CRM User Password** may have been entered for you by your CRMLink administrator. Enter this information if necessary, or review and modify it as required. Click **Next** to continue.

7. In the Installation Complete screen, click **Close**. The CRMLink Configuration Settings screen will automatically open so you can make changes if needed. Be sure to click **Save** when done.

8. Restart your computer to complete installation.

**To uninstall CRMLink Desktop**

Windows administrative privileges are required to uninstall CRMLink Desktop. If the user does not have administrative privileges, the CRMLink administrator can uninstall it for the user.

1. Exit CRMLink Desktop if it is running.

2. From the Windows Start menu, go to **Control Panel > Programs and Features**.

3. Search for “Uninstall CRMLink” and then double-click on it to launch the uninstall wizard. When the process has completed, the wizard will automatically close.
Launching CRMLink Desktop

Launching CRMLink Desktop for the first time

When the installation completes successfully, CRMLink Desktop opens automatically at the Configuration Settings screen so that user can review the information and make any required changes.

Launching CRMLink Desktop automatically

By default, CRMLink Desktop is configured to start automatically. To change CRMLink Desktop start-up behavior, see “Customizing CRMLink Desktop” on page 40.

Other ways to launch CRMLink Desktop

You can launch CRMLink Desktop in any of the following ways:

- From the Windows Desktop:

- From the Windows taskbar, if the program is running but you are signed out:

- From the Windows Start menu, choose Vertical CRMLink.

Only one copy of CRMLink Desktop can run at a time. If you try to start it when it is already running, you will see a warning message.
When CRMLink Desktop is running

Make sure that you are displaying all system tray icons (or specifically show the CRMLink Desktop icon) so that you will know when CRMLink Desktop is running:

The icon’s color indicates CRMLink Desktop’s status:

- CRMLink running and signed in (green and blue icon)
- CRMLink signed out (grey icon)
- CRMLink service temporarily interrupted (green and blue with a red X)

If the CRMLink Desktop icon does not appear in your system tray when CRMLink Desktop is running, do one of the following:

- In Windows Control Panel, choose Notification Area Icons, and then:
  - To show all icons, select the Always show all icons and notifications on the taskbar checkbox.
  - To show the CRMLink Desktop icon, locate it in the icon list and then select Show icon and notifications from the drop-down list.
- Click on the Show hidden icons button to the left of the system tray and click the CRMLink Desktop icon.
Using CRMLink Desktop

When CRMLink Desktop is running, right-click the icon in the system tray to access the following options:

![Menu Options]

If any option is disabled, that screen is already open. Minimize or close other windows to recover it.

Sign Out

Logs you out, but does not close CRMLink Desktop.

Clicking **Sign Out** prevents call popups from appearing on your screen. CRMLink will still record your call data to your CRM when you are logged out of CRMLink Desktop.

Configuration

See “Customizing CRMLink Desktop” on page 40 for details.

Dial

Opens a dialpad that you can use to initiate a call directly from CRMLink Desktop:

![Dialpad]

Vertical CRMLink 2.1
About

Displays the version number and other details about CRMLink Desktop:

![CRMLink Desktop About Us](image)

**Help**

Opens the *Vertical CRMLink Desktop User Guide*.

**Exit**

Logs you out and closes CRMLink Desktop. Clicking **Exit** prevents call popups from appearing on your screen. CRMLink will still record your call data to your CRM when CRMLink Desktop is not running.
Customizing CRMLink Desktop

You can customize CRMLink Desktop by:

- Changing start-up behavior or password
- Changing your call matching rules and popup behavior

Changing CRMLink Desktop start-up behavior or password

1. Right-click on the CRMLink Desktop icon in the system tray, and then click Configuration. The following graphic shows the Configuration Setting screen for a Microsoft Dynamics user:
2. On the General tab, you can set CRMLink Desktop’s start-up behavior and update your CRM password:

- **CRM Settings:**
  - **User Name:** Your Microsoft Dynamics user name.
  - **Password:** Your Microsoft Dynamics password.
  - **Security Token:** *Not required for Microsoft Dynamics users.*

- **General Settings:**
  - **Station ID:** Enter the ViewPoint station ID that you want to use for click-to-call features or when using the CRMLink dialpad. To use your default Wave device, enter 0.
  - **Launch on Startup and Auto-Login:** Select this checkbox to launch CRMLink Desktop and logon automatically when you power up your computer.
  - **Remember Me:** Select this checkbox to save your ViewPoint username and password so that they are entered for you automatically for future logons.
  - **Automatically Close Call Alert Pop Up.** Select this checkbox to close popups automatically, and then enter the number of seconds.

3. Click **Save** to save your changes. If you also want to change match criteria and popup settings, go to the next section.

4. If you are prompted to restart your system, do so. If a restart is required, you will not be able to launch CRMLink Desktop again until it occurs.

### Changing your call matching rules and popup behavior

Your CRMLink administrator assigned a template to you defining the call matching rules and popup settings that are applied to your CRM calls. If you have permission to do so, you can make changes to these rules and settings. Your changes will not modify the template or affect the settings for any other CRMLink Desktop users.
About match rules and popup settings

Match rules are used to determine what popup information is presented to CRMLink Desktop users on a CRM call. CRMLink match rules fire in order from top to bottom in the list that you define according to the steps below. The popup settings for the first rule that matches the call data will be used to present popup information to the user.

- There must be at least one match rule in the list. The default rule is All Calls with no matching criteria.
- The last rule in the list is used if all of the others fail to make a match. The last rule must be All Calls with no matching criteria.
- For all other rules, you use the other available fields to specify the specific CRM information used for matching a call to an entry in your CRM.

To change your call matching rules and popup settings

1. Right-click on the CRMLink Desktop icon in the system tray, and then click Configuration.
2. Specify the Wave call data that this rule applies to:
   - **When**: Select a Wave field to match on from the drop-down list, or use the default value “All Calls”.
   - **Matches Exactly**: *Optional*. Enter the exact value to match on, for example the DID number used.

3. Specify where in Microsoft Dynamics Wave should look for matches:
   - **Then Look For**: Select a Wave field associated with the call, for example “Caller ID Number”.
   - **In CRM Record**: Select the Microsoft Dynamics record to match on from the drop-down list, for example “Customer”.
   - **In CRM Field**: Select the Microsoft Dynamics field in that record to match on from the drop-down list, for example “Business Phone”.

4. Click **Popup Settings**. You should set popup settings for each rule, otherwise the default setting will be used.

   ![Popup Settings Example]

   - **For This Type Of Call**: Specify if the rule applies to all calls or inbound-only or outbound-only calls.
• **Perform This Action**: Specify what should popup when call matches are found:
  
  o **Pop CRM With**: When you choose this option, Microsoft Dynamics and CRMLink Desktop are both launched. Choose one of the following from the drop-down list:
    
    ▪ **Matching Phone Call Activity**: A new call log / task is opened.
    
    ▪ **Matching Record**: The record (for example, the Customer record) that matches the call data is opened. If no match found, a new record of the same type is opened with fields pre-filled as available.
    
    ▪ Select whether the popup opens when the **Call First Rings**, when the **Call Is Answered**, or when the **Call Is Over**.

  o **Pop Alert Box Only And Display**: When you choose this option, Microsoft Dynamics is not launched, but CRM Desktop opens and shows call data. You can select up to 3 fields from the matched record to display in the popup. If no match is found, caller ID is displayed.

  o **Pop Nothing**: When you choose this option, neither Microsoft Dynamics nor CRMLink Desktop is launched. Choosing this option does not affect CRM activity logging.

  o **Always Log a Call Activity Record To CRM**: Select this checkbox so that even when a user’s computer is powered down, CRM activity logs will still be generated.

5. Click **Save** to save all of your changes. If you changed popup rules, you also need to click **Save** on both the Popup Settings screen and the Match Criteria screen.

6. If you are prompted to restart your system, do so. You will not be able to launch CRMLink Desktop again until the restart (if one is required) occurs.
Chapter 7: 
CRMLink Administrator FAQ

This chapter answers frequently-asked questions about Vertical CRMLink. For detailed information, see the other chapters in this guide.

Do I have to use Internet Explorer as my browser?
Yes. Vertical is looking to add Chrome and Firefox support soon, but initially the product requires Internet Explorer version 8 or higher running on a Windows 7 or higher PC.

How do I get started?
CRMLink is designed to be easy to set up and easy to use. Here are the basic steps:
1. Create an account and buy your licenses.
2. Add your Wave and administrator details.
3. Add your Wave/CRMLink users.
4. Obtain and send the CRMLink Desktop installation link to users.

See the following for detailed steps:
- Chapter 2 starting on page 8 describes how to create and register an account and buy licenses.
- Chapter 3 starting on page 15 describes how to add Waves and Wave users to CRMLink.
- Chapter 5 starting on page 32 describes how to obtain and distribute the CRMLink Desktop installation link to users.

Who should register for a CRMLink account - partner, reseller or end-user?
The system was set so the end-users could administer everything themselves and get billed directly. If a partner or reseller wishes to create a single account for all of their customers, they can do that, but it will create problems with the free trials since we don’t expect a single customer to have multiple free trials.

Can the registration details be changed later on if the account name or credit card information needs to be updated?
Yes. You should see a link to “My Account” towards the top on the Vertical Online License page where account information can be changed.
Do I need to configure CRMLink from the Global Administrator Management Console on my Wave(s)?

No. Since the browser on your Wave is likely not the most current version, it’s actually recommended that you set up CRMLink outside of the Global Administrator, using the most current version of Internet Explorer.

Is there a free trial option for my CRM?

For each of the available CRMs, we offer a 90-day free trial. (Look for the dropdown option on VOL that ends in “-TRIAL”.) Customers must provide a credit card when they first sign up; this is used to automatically convert the free trial to a paid version at the end of the trial period.

I bought my licenses. Now how do I set up my Wave?

To configure CRMLink for your Wave(s), go to the main Vertical Online License page and click the “Product Administration” button. You will be prompted to login again for security reasons. The CRMLink Administrator Dashboard will then launch in the same window.

See Chapter 3 on page 8 for detailed steps.

I clicked the Product Administration button and instead of the CRMLink Administrator Dashboard, I’m seeing a login page. Now what?

The authentication protocol requires that cookies are enabled. Check the setting in your browser and try again.

When can I add new licenses for my account?

You can add additional user licenses at any time. To add licenses, log into Vertical Online Licenses and choose the Purchase Licenses option. Your credit card on file will be charged a prorated amount for the remainder of the month’s usage. These licenses are available immediately upon completion of the checkout process.

When can I remove licenses from my account?

Once purchased, licenses are effective for the entire month. You can initiate a request to reduce your license count at any time during the month, but the licenses will remain active until the next billing date (the 1st of the next month).

Note: If the number of licenses paid for is less than the number of CRMLink users allocated, all CRMLink users will be disabled until the situation is corrected (either by removing CRMLink users or purchasing more licenses).
Is the CRMLink administrator user the same as the Wave Global Administrator user?

No. CRMLink does not use the Wave Global Administrator credentials at all. Instead, the CRMLink administrator is identified in CRMLink Advanced Settings via his or her ViewPoint User Name and Password.

How do I get the right CRM record to open for my calls?

First check your CRM to see where the data you want to match is stored. You’ll need the name of the field as well as the record that it’s on, for example the Business Phone field on the Customer record. Next, modify your Match Criteria dropdowns for “In CRM Record” and “In CRM Field” so they are set to these values.

See “About match rules and popup settings” on page 25 for details.

I made a change to my templates in the CRMLink Administrator. Why hasn’t it changed my existing users’ rules?

Administrator templates are used to generate the initial settings for CRMLink Desktop users. Once the CRMLink client (CRMLink Desktop) is installed on a user’s PC, any further changes need to be done directly through CRMLink Desktop.

How can I set up click-to-call within my CRM?

See “Setting up CRMLink Click-to-Call for Microsoft Dynamics users” on page 22 for details.

What’s a WUN?

For each Wave configured for CRMLink, a Wave Unique Name (WUN) is automatically generated. This unique ID can be used to identify a Wave when investigating errors.
Chapter 8: CRMLink Desktop FAQ

This chapter answers frequently-asked questions about CRMLink Desktop:

- Installing and uninstalling CRMLink Desktop. See page 48.
- Using CRMLink Desktop. See page 49.
- Password control. See page 51.
- The CRMLink Desktop alert box. See page 53.
- Call matching. See page 55.
- Popup behavior. See page 56.

For more about installing and using CRMLink Desktop, see Chapter 6.

Installing and uninstalling CRMLink Desktop

How do I install CRMLink Desktop?

See page 34.

How do I uninstall CRMLink Desktop?

See page 35.
Using CRMLink Desktop

How do I start CRMLink Desktop?

By default, CRMLink Desktop is set to automatically start when you log in to your computer. Before attempting to start it, check if it is already running.

1. Go to your computer’s Task bar and find the CRMLink logo. If it’s not in your Task bar, find the shortcut that was created on your desktop during installation.
2. Double-click the CRMLink Desktop logo to start CRMLink Desktop.

How can I set up CRMLink Desktop to start automatically when I turn on my computer?

Do either of the following:

1. From the Configuration screen, click the General tab.
2. In the General Settings section, select the Launch on Startup and Auto-Login checkbox.
3. Click Save. The new setting will be used the next time that you sign in or start CRMLink Desktop.

-or-

1. Start CRMLink Desktop.
2. Select the Launch on Startup and Auto-Login checkbox and then click Login.
How do I sign in to CRMLink Desktop?

1. Go to your computer’s Task bar.

   ![CRMLink Desktop Task Bar]

2. Right-click the CRMLink logo and then choose **Sign In**.

How do I sign out of CRMLink Desktop?

1. Go to your computer’s Task bar.

2. Right-click the CRMLink logo and then choose **Sign Out**.

How do I exit CRMLink Desktop?

1. Go to your computer’s Task bar.

2. Right-click the CRMLink logo and then choose **Exit**.

How can I know the current status of CRMLink Desktop?

The CRMLink Desktop task bar icon changes to indicate the current status:

- 🔄 CRMLink running and signed in (green and blue icon)
- 🔄 CRMLink signed out (grey icon)
- 🔄 CRMLink service temporarily interrupted (green and blue with a red X)
How do I get to CRMLink Desktop to access menu items like settings and configuration?

1. Go to your computer’s task bar.
2. Right-click the CRMLink logo and then choose Configuration.

Password control

How do I update my Microsoft Dynamics password for CRMLink Desktop?

1. From the Configuration screen, click the General tab.
2. Use your mouse to highlight the current Password and then click Delete.
3. Type a new Password.
4. Click Save.

How do I update my ViewPoint password for CRMLink Desktop?

If your ViewPoint password has changed, you also need to change it in CRMLink Desktop. If CRMLink Desktop is set to start automatically, you do not have the opportunity to do so because the login screen is bypassed.

1. Set CRMLink Desktop to not start automatically. To do so:
   a. From the Configuration screen, click the General tab.
   b. In the General Settings section, deselect the Launch on Startup and Auto-Login checkbox.
   c. Click Save.
   d. Sign in to CRMLink Desktop, deselect the Launch on Startup and Auto-Login checkbox and then click Login.
2. Sign out of CRMLink and then sign back in. (See page 49 for instructions.)
3. When the CRMLink Desktop login screen opens, enter your new ViewPoint Password.
4. Click Save.

**How do I prevent CRMLink Desktop from remembering my ViewPoint password?**

Perform the following steps if you do not want CRMLink Desktop from remembering your ViewPoint password. Note that you will then have to enter your password every time you sign in or start CRMLink Desktop.

1. From the Configuration screen, click the General tab.
2. In the General Settings section, deselect the **Remember Me** checkbox.
3. Click **Save**. The new setting will be used the next time that you sign in or start CRMLink Desktop.

**How can I set up CRMLink Desktop to remember my ViewPoint user name and password?**

Do either of the following:

1. From the Configuration screen, click the General tab.
2. In the General Settings section, select the **Remember Me** checkbox.
3. Click **Save**. The new setting will be used the next time that you sign in or start CRMLink Desktop.

- or -

1. Start CRMLink Desktop.
2. Select the **Remember Me** checkbox and then click **Login**.
How do I turn off CRMLink Desktop’s automatic login setting?

1. From the Configuration screen, click the General tab.
2. In the General Settings section, deselect the Launch on Startup and Auto-Login checkbox.
3. Click Save. The new setting will be used the next time that you sign in or start CRMLink Desktop.

The CRMLink Desktop alert box

How do I use the CRMLink Desktop alert box?

CRMLink automatically shows an alert box for each call made.

The alert box displays the following information:

- Caller ID number
- Time of call
- A link to the record found in the CRM. The text shown for the link will vary, depending on the type of record matched or if it is a new caller who is not found in the CRM.

The next call made creates a new entry at the top of the alert box and collapses the entry currently opened. The most current call will always be at the top.
How do I open a previous call record in the alert box?

When you leave the CRMLink Desktop alert box open, it begins to grow a list of what calls you’ve handled.

To open a previous record:

1. Click the row with the phone number and time of the call you need. This expands the alert box to show the link for that call.
2. Click the link to open the CRM to the record linked to the call.

When you close the alert box, the alert box resets, and clears the display. To open an earlier record, check your CRM’s phone call activity records.

I only want the alert box to open when a call is made. How do I do that?

1. From the Configuration screen, click the Match Criteria tab.
2. Under the heading “Apply Settings”, click the Popup Setting button.
3. In the Perform This Action section, click Pop Alert Box Only and Display.
4. To customize the alert box display, select up to 3 fields from the drop-down lists.
5. Click Save to return to the Match Criteria screen.
6. Click Save.

How do I set CRMLink Desktop to automatically close the alert box?

1. From the Configuration screen, click the General tab.
2. Select the **Automatically Close Call Alert Pop Up** checkbox.

3. In the **after ___ seconds** text box that opens below, enter the length of time in seconds after which the alert box will close.

4. Click **Save**.

### Call matching

**How do I change which CRM field is used for matching calls? What should I do if CRMLink Desktop isn’t opening the right existing record?**

1. Check your CRM to determine the record and field where your match data is stored. For example, is it in the Contact record or the Lead record? What is the name of the field where the phone number (or other item) appears?

2. From the Configuration screen, click the Match Criteria tab.

3. Under the heading “In CRM Record”, select the record type that you identified in step 1 from the drop-down list.

4. Under the heading “In CRM Field”, select the field name that you identified in step 1 from the drop-down list.

5. Click **Save**.
Popup behavior

How do I change the CRM record that opens when a call is made?

1. From the Configuration screen, click the Match Criteria tab.
2. Under the heading “Apply Settings”, click the **Popup Setting** button.

   ![Popup Setting](image.png)

3. In the **Perform This Action** section, select one of the following from the **Pop CRM with** drop-down list:
   - **Matching Phone Call Activity**. This is the record that CRMLink creates for each phone call.
   - **Matching Record**. This is the Customer/Contact/etc. record that matched the caller, according to your Match Criteria.

4. Click **Save** to return to the Match Criteria screen.
5. Click **Save**.
How do I change when the CRM opens when a call is made?

1. From the Configuration screen, click the Match Criteria tab.
2. Under the heading “Apply Settings”, click the **Popup Setting** button.
3. In the **Perform This Action** section, under **Pop CRM With** click one of the following:
   - **Call First Rings.** Your CRM and the CRMLink Desktop alert box open immediately when the call rings.
   - **Call is Answered.** Your CRM and the CRMLink Desktop alert box open when the call is answered.
   - **Call is Over.** Your CRM and the CRMLink Desktop alert box open when you hang up.
   These settings do not affect call logging.
   Click **Save** to return to the Match Criteria screen.
4. Click **Save**.

I do not want to launch my CRM or the CRMLink Desktop alert box when calls are made. How do I just log my calls?

1. From the Configuration screen, click the Match Criteria tab.
2. Under the heading “Apply Settings”, click the **Popup Setting** button.
3. In the **Perform This Action** section, click **Pop Nothing**.
4. Click **Save** to return to the Match Criteria screen.
5. Click **Save**.