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# Enterprise CRM

# Manual



Luxsys Inc.

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## **Introduction**

The Enterprise CRM (Customer Relationship Management system) is software integrated with IP PBX and smart IP phones on the Local Area Network platform. It creates an infrastructure that unifies the data applications and the voice network. Integrated voice features such as unified messaging, "click-to-dial" and power-dialer requires the complex coordination of voice and data networking environments. Convergence at the IP network level eliminates much of this complexity and the results are lower costs attained from consolidating equipment and rapid integration with business applications. One of the main advantages of our system is the fact that it employs converged data and voice networks.

Enterprise CRM/DSS software is a user friendly application powered by CTI, Customers Address Book, Client Recognition, Data Mining, Billing and etc. With such functionality companies are able to improve their customer service and increase their employee performance. For instance, CRM Software based on CTI technology recognizes clients by caller ID and helps to response them by looking at the clients profile in the Database. The profiles of each customer are popped up automatically for routed incoming call. In the customer's profile, employees can quickly notice how many products were purchased by certain customer and when the last order was made.

On the other hand, the log information from each call are stored on the Client/Server database. Such information with help of CRM/DSS by being transformed into valuable knowledge can be used to analyze the customers' behavior and help managers to optimize their telephone system for more productive usage. Moreover, with such system manages can monitor and record the calls to be more aware of their employees and customers' needs. A real estate business, for instance, can reduce disputes and disagreements with customers if they are able to record all telephone calls. And when there are disputes about oral agreement, they can retrieve the recording and find the solution for the problem.

The Enterprise CRM provides the mature business solution with the full set of advanced features.

## Launch the CRM

In order to launch E-CRM application you need to double click on the E-CRM icon located on your desktop. If you have no E-CRM icon on the desktop, you can launch the application from the “Call Manager” program group in start menu.

In case, if you downloaded or received a demo version of E-CRM application you will see a message box, that indicates how many days left for the evaluation. The registered users of full version would be proceeded directly to the following window:



### 1. IP-PBX Server

First of all, you need to choose the IP of domain address of IP-PBX server from the list. (Ex: 192.168.0.100)

By pressing Enter or Tab Key you can navigate to the next Login ID field.

- Tab key to navigate forward to the next field.
- Shift+Tab key to navigate to backward, to the previous field.

After filling in the appropriate LoginID and passwords, press “Connect” button.

Before opening the main window, the software connects with update server to checks if new version is available for download.

## 2. Interface (GUI)

The screenshot shows a software window titled "Customer Form" with a blue border. The window contains several input fields and controls:

- Reg. Date:** A date field showing "2008-11-07".
- Name:** A text input field.
- Details:** A section containing "Social ID" and "Corp. ID" fields, each with a hyphen separator.
- Customer Type:** Radio buttons for "Public" and "Private".
- Address:** "Address" and "Address2" text input fields.
- Location:** A field with a location pin icon.
- Phone number:** A field with a phone icon.
- Memo:** A large text area for notes.
- Notes:** A smaller text area at the top right.
- Bottom Bar:** Contains "Save", "Delete", "Cancel", and "Switch" buttons.

Yellow callout boxes provide the following explanations:

- "Customer's registration form" points to the top section of the form.
- "You can manage two types of records in your address book. 1) Public (Corporate Clients) 2) Private(Family and Friends)" points to the "Public" and "Private" radio buttons.
- "You can arrange customers groups" points to the "Customer Type" radio buttons.
- "You can group your clients by the categories, to offer service level/discounts (A+ ,B,C,D..)" points to the "Customer Type" dropdown menu.
- "Save/Delete buttons" points to the "Save" and "Delete" buttons.
- "Switch button is used to switch between several customer forms, when employee serves several clients at same time" points to the "Switch" button.

At the top of the main window there are File, Edit, View, Advanced, Window and Help menus and the tool bar with buttons.

**Reg. Date:** The date when customer's form was registered into the database.

**Name :** Full name field

**Details/Customer Code :** Company name or unique Code to identify this customer.

**Social ID:** Customer's Social ID (Required in Korea).

**Corporate ID :** Corporate ID number (Required in Korea).

**Postal :** Postal code.

**Address :** Main address.

**Address 2 :** Second addresses.

**Location :** The directions that can help to find customer's location quickly.

## How to register a new customer?

Whenever you receive a call from a new customer, the application will report that the Caller ID was not registered yet. A new yellow form will be opened with customer's phone number. After filling the remaining customer's information, the form can be saved into the system.

This button is used for call booking

The + button adds or updates phone number in the list.

Deletes a phone number from list.

821022240000

Direction

Dial

Book

Fax

Phone number	Memo
82-10-2224-0000	Cell phone

The list of registered phone numbers. You click to dial a customer, or select and dial several numbers simultaneously.

The “+/pen” button on the form is used for two purposes:

- It can add new phone numbers into the list.
- It can be used to edit the existing numbers.

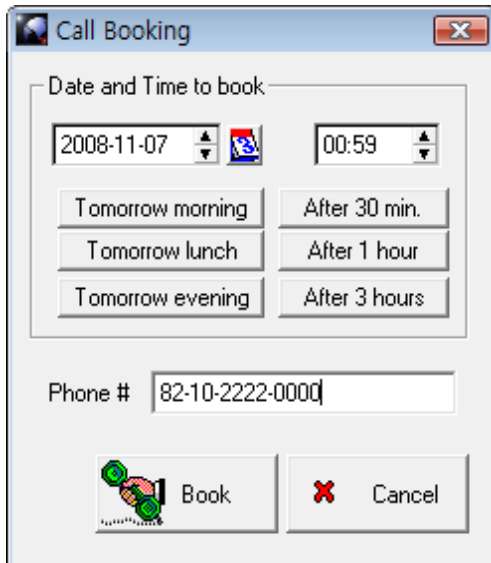
You can add not only telephone numbers, but also SIP:URI numbers, that can be used with Click-to-Dial feature, to place free peer-to-peer calls.

- [extension@sipdomain](#) or [extension@ipaddress](#)
- [3000@luxsys.net](#)

The “Fax” buttons or “Send Fax”, is used to transmit documents and images on local computer via fax. This feature be used with IP-PBX server with enabled T.38/T.30 Fax Server functionality.

Click-to-Dial: By pressing on Dial button you can dial your customer number directly from CRM. The Direction option indicates which side to ring first.

## Call Booking



Call Booking

Date and Time to book

2008-11-07 00:59

Tomorrow morning After 30 min.

Tomorrow lunch After 1 hour

Tomorrow evening After 3 hours

Phone # 82-10-2222-0000

Book Cancel

Call booking Window

**Date and Time fields :** These fields are used to set a time in future for the booked call.

**Tomorrow morning :** This button sets the 09:30 AM time at tomorrow.

**Tomorrow lunch :** This button sets the 12:10 PM time at tomorrow.

**Tomorrow evening :** This button sets the 18:10 PM time at tomorrow.

**After 30 minutes :** This button sets time after 30 minutes.

**After 1 hour :** This button sets time after 1 hour.

**After 3 hours :** This button sets time after 3 hours.

**Phone number :** This fields sets the phone number to call.

※After booking the call, it is still going to be processed, even when the CRM application is closed.

## 2. Phone Setup

Speed Dial	Phone number	Memo
1	8190366660000	Customer at Japan
2	85000	Conference room
3	61262223590@aarnet.edu.au	Weather in Canberra, Australia

The phone setup windows, configures the PBX features for your extension, you can check current status of the settings. When employees are leaving their sits for the lunch, they can quickly route calls with call forwarding feature to their mobile phones.

You can add SIP:URI numbers to speed dial list. The SIP:URI numbers are usually used with ENUM. For instance we can use free “sip:+61262223590@aarnet.edu.au” number to check the weather in Canberra, Australia. The SIP:URI syntax for E-CRM is “[61262223590@aarnet.edu.au](mailto:61262223590@aarnet.edu.au)”

[On voip-info.org portal you can learn other free SIP numbers as well.](http://voip-info.org)



### 3. Program Settings

The screenshot shows the 'Program Settings' dialog box with the 'CTI Configuration' tab selected. The dialog is divided into several sections:

- Communication:** Includes an 'Area code' text box and an 'Outbound prefix' section with radio buttons for 'Automatic' (selected) and 'Manual'.
- Database Backup:** Features radio buttons for 'Auto' (selected) and 'Manual', a 'Time' spinner set to '17:55', and an 'Open' button with a folder icon.
- Customer Data:** Contains checkboxes for 'Restrictive editing mode' and 'Use unique customer id'.
- Billing:** Includes 'Local telephone' and 'Cell phone' spinner boxes set to '30' and '10' respectively.
- Interface (GUI):** Has checkboxes for 'Active Red border' and 'Select word inside the search field' (both checked), and a checkbox for 'CustomerID instead of Details'. Below this is a '<Select bar> color' section with a blue color swatch and a 'Change' button.
- Other options:** Checkboxes for 'Exit CRM on window close' and 'Auto Login', and a 'Reset GUI to defaults' button.

At the bottom, there is a note: 'Only Administrator account can modify these options. You need to restart the application, in order to apply the change.' The dialog also features 'Save' and '취소' (Cancel) buttons at the bottom right.

**Area code :** Set the area code for local telephone numbers.

**Active Red border :** Enables or disables the red border over the active field.

**Select word inside the search field :** Select the old key word when users attempts a new search.

**Customer ID instead of Details field:** Replaces Details field with Customer ID.

**Restrictive editing mode :** The application forces user to fill all important information, such as telephone number, address and postal code

**Select bar color:** You can choose the color of select bar in the list boxes. (Some users prefer to see a black color select bar instead of default windows blue which)

**Use unique customer id :** When checked the Customer ID filed in the form is treated as unique field.

**Reset GUI to defaults :** This application remembers the positions of window and column settings of list boxes. This buttons is used to reset all settings to default.

**Exit CRM on window close :** This options tells program to exit when [X] button is pressed, by default the program is minimized into the windows tray.

**Auto login :** This option enables/disables auto login.

**Database Backup :** Auto database backup feature, that stores daily data to local computer.

#### CTI Configuration Tab

There are three methods to configure the way how CTI is handled by the application:

- Internal CRM.
- Hyper link (Web CRM), integrates the E-CRM with extenal Web CRM/ERP.
- Launch appliation option, integrates wht E-CRM with external GUI CRM/ERP.

#### 4. Functionality List

You can print the list of all special function keys to trigger IP-PBX features. Above is the last page of the list in the print preview window.

#### Functionality List

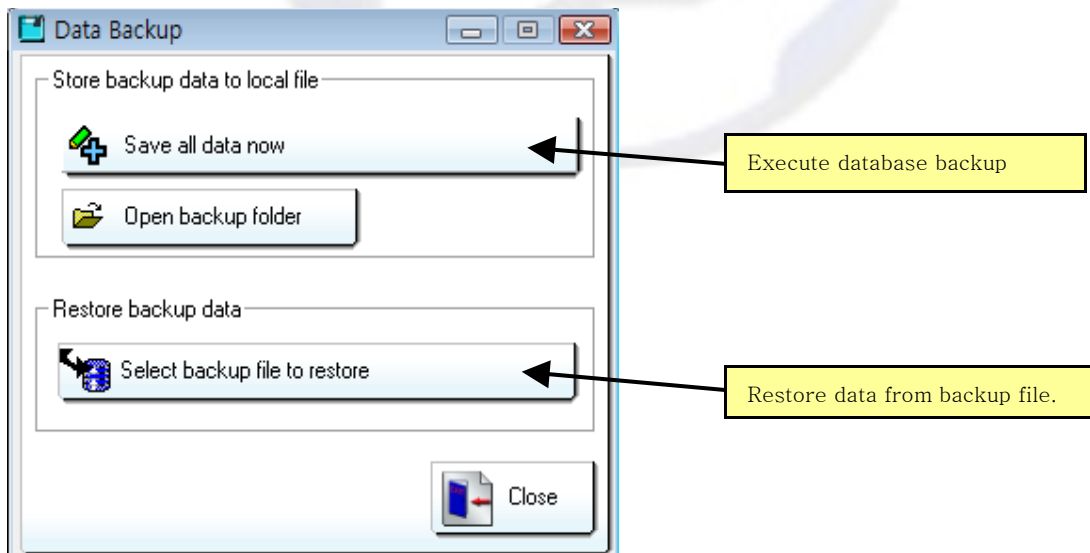
Ex.) \*\_91. : The feature code that starts with underscore sign (-), you need to dial \*91 code and number to setup together at once,\*917000

Ex.) \*70 : This combination is straight forward, just dial \*70.

The local extension of the phone that dialed feature is used for setup.

#	Extension	Description	Category
36	_*91.	Call Forward on Busy	Custom
37	_*97.	Record Voice (Remove recording assigned for dialed extension)	Custom
38	_*99.	Recrod Voice (Listen recording of dialed extension)	Custom
39	_8Local Ext.	Meetme Conference	Custom
40	_9	PSTN Backup line	Custom
41	##	Call Transfer (Blind)	Feature
42	#9	Attended Transfer (Consultative transfer)	Feature
43	**	Call pickup	Feature
44	*2	Soft Hangup	Feature
45	*7	One touch recording	Feature
46	700	Call parking	Feature code

#### 5. Database Backup



**We strongly recommend to regularly backup you database!**

In the backup folder the previous backup file is renamed as “bkcrm\_Old.tps” file and the new backup file is stored with “bkcrm.tps” file name.

## **6. Print Setup**

In this window, user can select the print and set the paper size to use when logs and reports are printed.

## **7. Exit from CRM**

Click on the Exit option in File menu or E-CRM menu in the tray to exit the application.



## View Menu

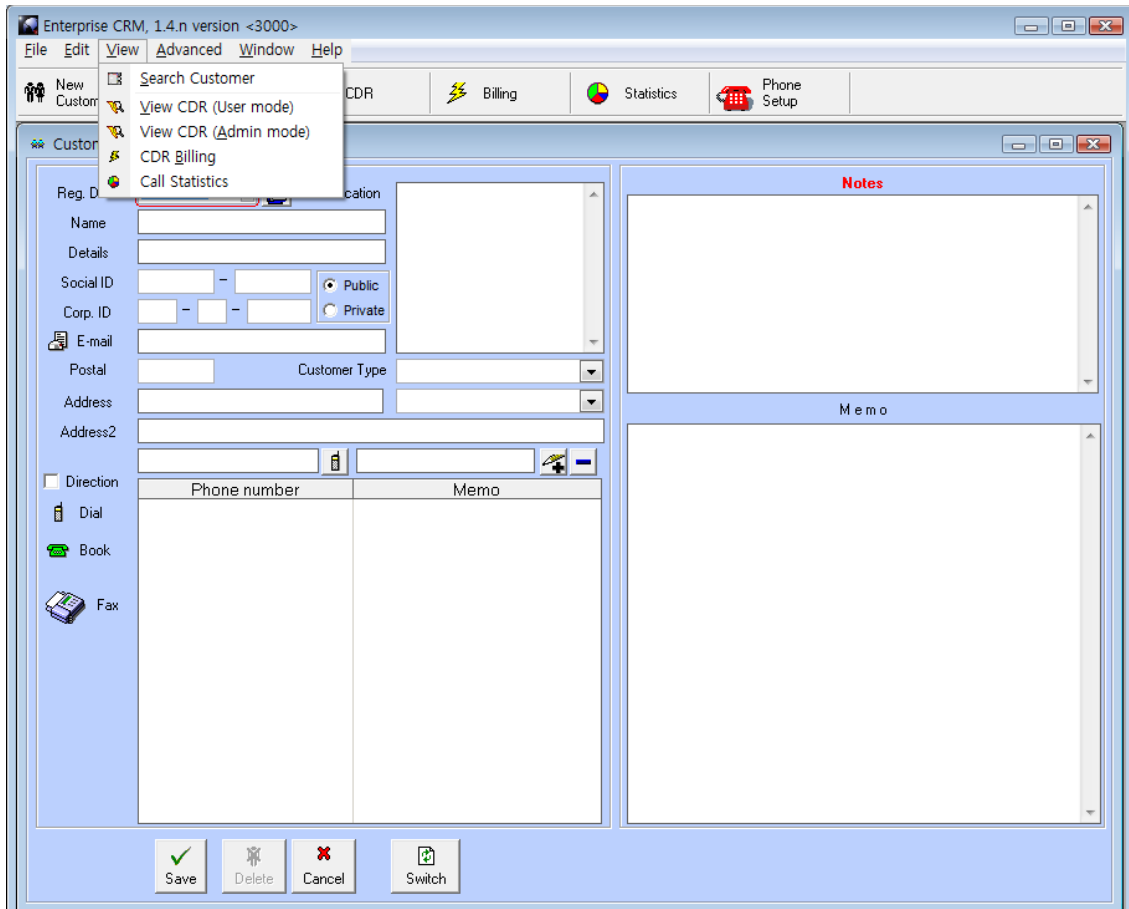
**Search Customer**

**View CDR (User mode)**

**View CDR (Admin mode)**

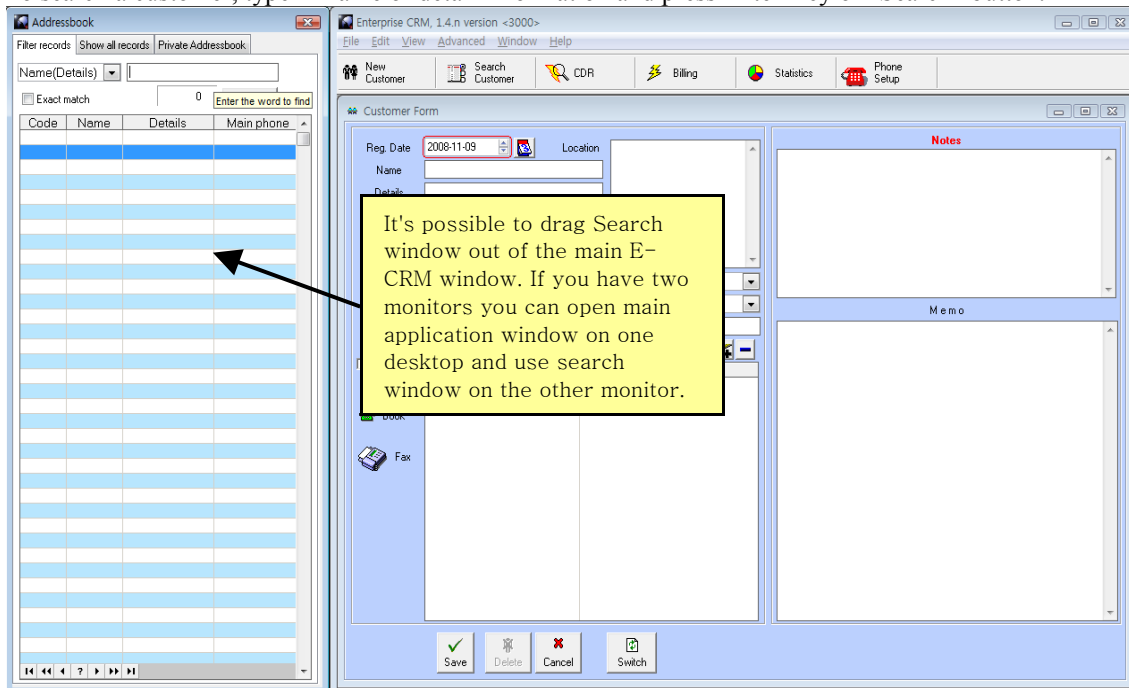
**CDR Billing**

**Call Statistics**

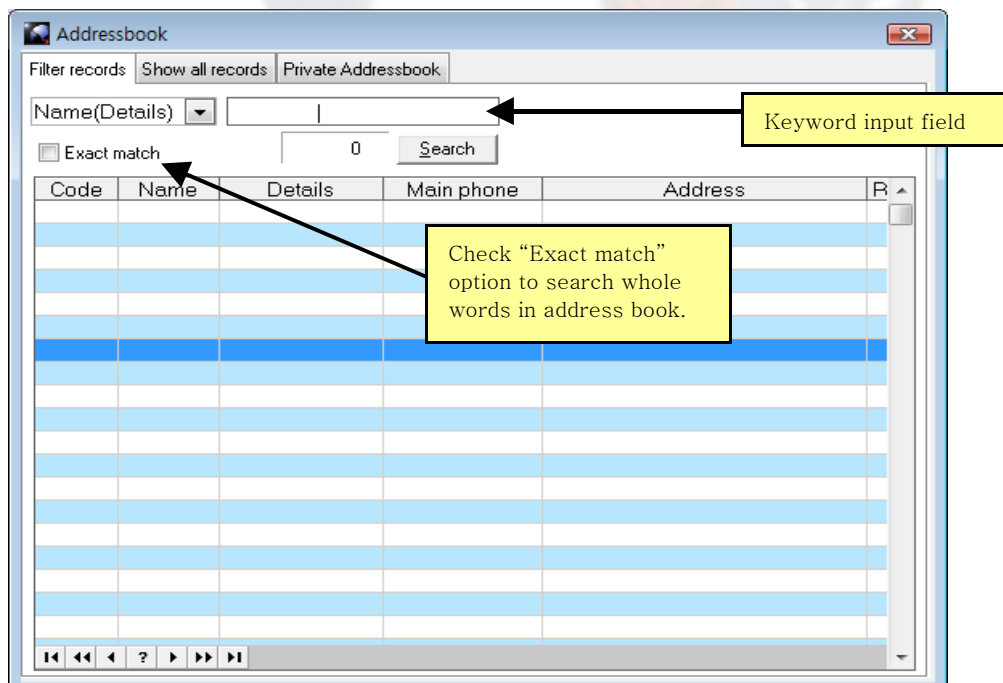


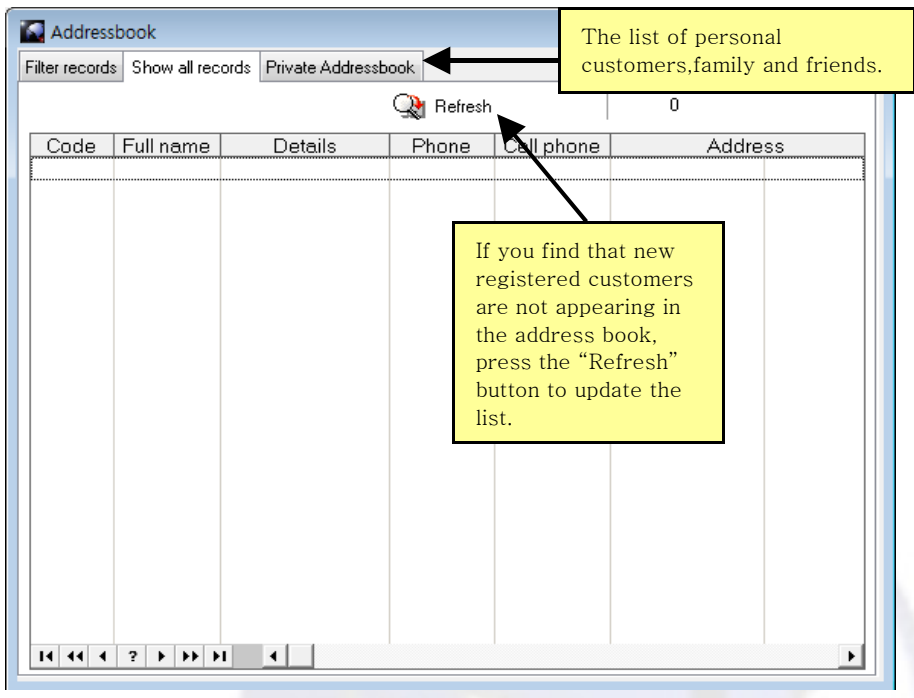
## 1. Search customer

To search a customer, type in name or detail information and press Enter Key or “Search” button.



The “Address book” window:





It's recommended to use filter records tab when the customer database is large. In the "Filter records" tab users can search customers by name, phone number, address, groups and categories. The "show all records" retrieves all records of corporate clients from the address book. It's possible for users to separate their personal customers, family and friends records from public address book. They can access to their personal database from the private address book tab.

**CTI Feature and Address book window:**





## 2. View CDR (User mode)

Play recording

Stop

Print CDR Log.

Call status, O means call was answered, X means call failed.

Double click on green icon to dial the number.

Check tag to indicate that the current recording is important.

Status	Call date	Call time	Caller ID/ Name	Caller t	Callee ID/	Callee number	Ar	Et	Bill sec.	Im	Contents
O	2008-11-10	11:59:17		3006		8201022240074		20	2	<input type="checkbox"/>	Listen
O	2008-11-10	11:58:48	Alisher M.	3000		3006		20	2	<input checked="" type="checkbox"/>	Listen
O	2008-11-10	11:23:41	Alisher M.	3000		3006		20	7	<input type="checkbox"/>	
O	2008-11-10	11:22:38		3006		821022240074		20	10	<input type="checkbox"/>	
O	2008-11-10	11:21:49	Alisher M.	3000		821022240074		20	10	<input type="checkbox"/>	
X	2008-11-10	11:21:29	Alisher M.	3000		01022240074		20		<input type="checkbox"/>	
O	2008-11-10	10:56:06	Alisher M.	3000		3006		20	7	<input type="checkbox"/>	
X	2008-11-10	10:55:08	Alisher M.	3000		3006		20		<input type="checkbox"/>	
X	2008-11-10	10:54:41		3006	Alisher M.	3000		20		<input type="checkbox"/>	
	2008-11-10	10:51:35		3006	Alisher M.	3000		20		<input type="checkbox"/>	
	2008-11-10	10:51:21		3006		3006		20	4	<input type="checkbox"/>	
				3006		01022240074		20		<input type="checkbox"/>	
				3006	Alisher M.	3000		20		<input type="checkbox"/>	
				3006	Alisher M.	3000		20		<input type="checkbox"/>	

The user mode view CDR window shows only call records that are related to logged user. In the user mode, it's possible to backup and print the CDR. However users cannot delete the contents of cdr.



### 3. View CDR (Admin mode)

Call Statistics

Call time: 42sec. (0:42) Average: 3sec. (0:03) Total: 14calls Succeeded: 7calls Failed: 7calls Billed: US\$0

Call date	Time	Caller ID/N	Callee ID/N	Callee number	Answered	End	Duration (min)	Billing (min)	Status	Contents	Billing (sec)	Last application
2008-11-10	11:58:48	Alisher M. 3000	3000	3006	2008-1	2008-	0:04	0:02	answered	Listen	4	Dial
2008-11-10	11:23:41	Alisher M. 3000	3000	3006	2008-1	2008-	0:09	0:07	answered		9	Dial
2008-11-10	11:21:49	Alisher M. 3000	3000	821022240074	2008-1	2008-	0:21	0:10	answered		21	Dial
2008-11-10	11:21:29	Alisher M. 3000	3000	01022240074	2008-1	2008-	0:12	0:00	no answer		1	Hanqup
2008-11-10	10:56:06	Alisher M. 3000	3000	3006	2008-1	2008-	0:07	0:00	no answer		28	Dial
2008-11-10	10:55:08	Alisher M. 3000	3000	3006	2008-1	2008-	0:04	0:04	answered		10	Dial
2008-11-10	11:59:17	3006	3006	8201022240074	2008-1	2008-	0:04	0:04	answered	Fax (pdf)	11	Dial
2008-11-10	11:22:38	3006	3006	821022240074	2008-1	2008-	0:04	0:04	answered		20	Dial
2008-11-10	10:54:41	3006	Alisher M. 3000	3000	2008-1	2008-	0:12	0:00	no answer		12	Dial
2008-11-10	10:51:35	3006	Alisher M. 3000	3000	2008-1	2008-	0:07	0:00	no answer		7	Dial
2008-11-10	10:51:21	3006	3006	3006	2008-1	2008-	0:04	0:04	answered		4	BackGround
2008-11-10	10:47:21	3006	3006	01022240074	2008-1	2008-	0:01	0:00	busy		1	Hanqup
2008-11-10	10:46:04	3006	Alisher M. 3000	3000	2008-1	2008-	0:08	0:00	no answer		8	Dial
2008-11-10	10:45:43	3006	Alisher M. 3000	3000	2008-1	2008-	0:11	0:00	no answer		11	Dial

\* Backup PSTN(9#) calls were not accounted in the billing calculations.

Only SuperAdmin and Admin accounts can access the “View CDR (Admin mode)” window. For fax documents that are saved as PDF files you need to install a PDF viewer. The two popular PDF viewers are Adobe Viewer and Foxit Reader. For the fax documents that are saved as TIF files you need to assign “Windows Picture and Fax viewer” application as a default application to open TIF files, or you can use any other image viewer application.



## 4. CDR Billing

Enterprise CRM, 1.4.n version <3006> - [Call Billing]

File Edit View Advanced Window Help

New Customer Search Customer CDR Billing Statistics Phone Setup

From date 08-11-10 to 08-11-10 Inbound/outbound routes: Both Billing: Local 30 01X 10 Search Show all

**Select All** Call time: 42sec. (0:42) Average: 3sec. (0:03) Total: 14calls Succeeded: 7calls Failed: 7calls Billed: US\$0

Call Date	Time	Status	Employee	Extension	Route	Phone number	Answer	End time	Duration	En. min.	Cost	Contents	Duration (se)
2008-11-10	11:59:17	O	Alisher M.	3006	Outbound	8201022240074	2008-1	2008-11-	0:11	0:02		Listen	11
2008-11-10	11:58:48	O	Alisher M.	3000	Outbound	3006	2008-1	2008-11-	0:04	0:02		Listen	4
2008-11-10	11:23:41	O	Alisher M.	3000	Outbound	3006	2008-1	2008-11-	0:09	0:07			9
2008-11-10	11:22:38	O		3006	Outbound	821022240074	2008-1	2008-11-	0:20	0:10			20
2008-11-10	11:21:49	O	Alisher M.	3000	Outbound	821022240074	2008-1	2008-11-	0:21	0:10			21
2008-11-10	11:21:29	X	Alisher M.	3000	Outbound	01022240074	2008-11-	2008-11-	0:01	0:00			1
2008-11-10					Outbound	3006	2008-1	2008-11-					28
2008-11-10					Outbound	3006	2008-1	2008-11-					10
2008-11-10					Outbound	3000	2008-1	2008-11-					12
2008-11-10					Outbound	3000	2008-1	2008-11-					7
2008-11-10					Inbound	3006	2008-1	2008-11-					4
2008-11-10					Outbound	01022240074	2008-11-	2008-11-	0:01	0:00			1
2008-11-10	10:46:04	X		3006	Outbound	3000	2008-11-	2008-11-	0:08	0:00			8
2008-11-10	10:45:43	X		3006	Outbound	3000	2008-11-	2008-11-	0:11	0:00			11

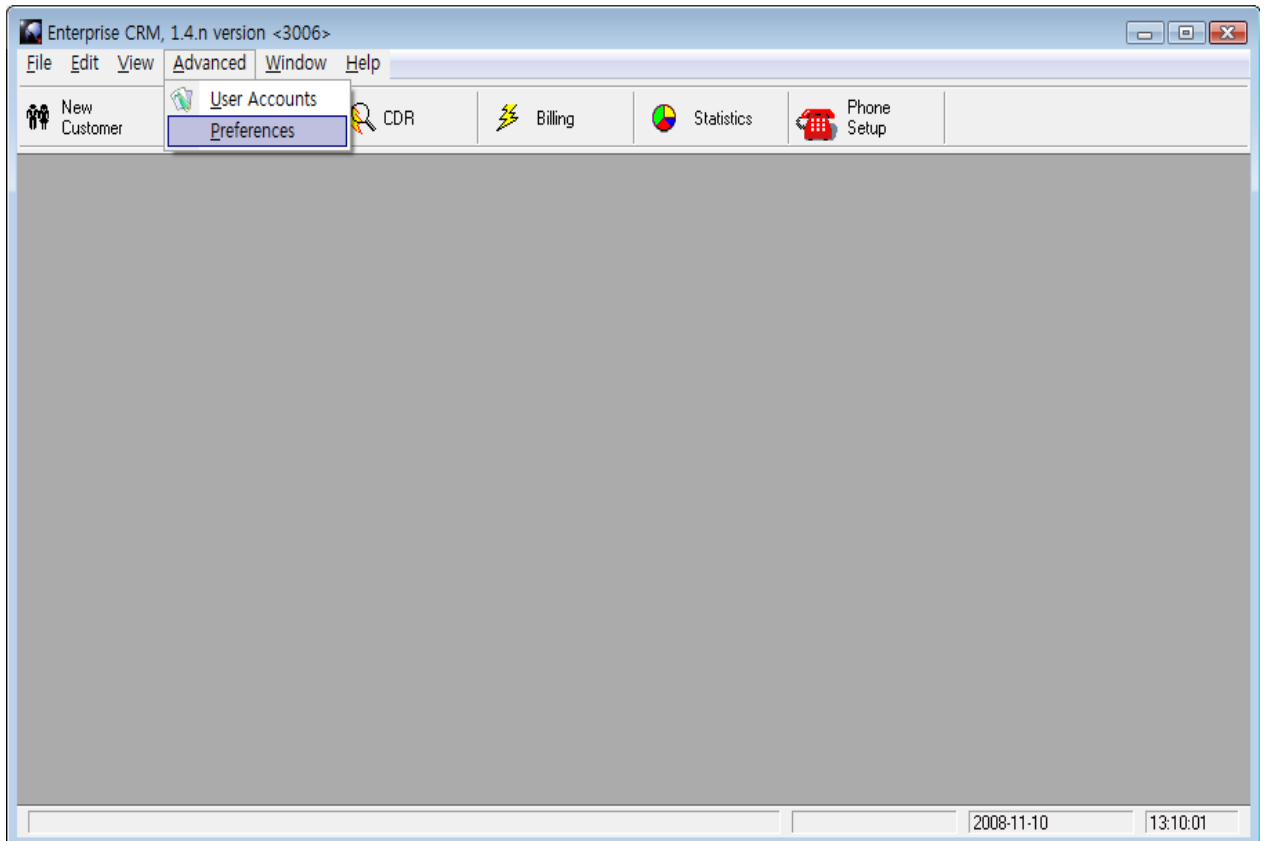
Filter CDR by inbound/outbound routes. Can be useful when you are billed only for outbound calls.

CDR Billing fields. You can enable billing feature from AMP.

⌘ Backup PSTN(9#) calls were not accounted in the billing calculations.

## Advanced Menu

### User Accounts Preferences



## 1. User Accounts

The screenshot shows a 'User Account' window with a table on the left and a form on the right. The table lists 'admin' and '3005'. The form includes fields for Login ID (3005), Name, Department (Departments), Authority (USER), E-mail, Position (Positions), and a 'Phone #' field. There are also checkboxes for 'CDR (Admin mode)' and 'Disable CTI', and buttons for 'Add new employee', 'Update account', 'Delete', and 'Close'. A 'Password' section contains 'Old password', 'New password', and 'Re-enter' fields. An 'Extensions' list shows '3005' in the first slot. Yellow callout boxes provide instructions: 'Enter the phone number to place an emergency call or send SMS.' (pointing to Phone #), 'To add a new account, first press Add new employee button and then after filling the form press the update account button.' (pointing to Add new employee and Update account), 'You can disable the CTI feature for certain users.' (pointing to Disable CTI), and '선택된 사원이 사용할 내선번호를 입력합니다.' (pointing to the first extension slot).

**Login ID :** The login id to access the E-CRM.

**Name :** Full user/employee name.

**Department :** Choose the department that user belongs to.

**Authority :** Account level, possible options: Super Admin, Admin, User and Guest.

**Position :** The position of the employee.

**Joined :** The account registration date.

**Left :** The date when account was disabled.

**Phone # :** The phone number to reach employee at emergency situation.

## 2. Preferences

#	Title	Code
1	Technician	2000
2	Agent	2001
3	Manager	2002
4	CEO	2003
5	Staff	2004

Code: 2000

Title: Technician

Memo:

Color:  Pick up

Save Delete Close

From the preferences window it is possible to configure the contents of options that are using in the CRM application, such as Departments/Positions/Transactions/Customers Group/Categories.

After saving the new configuration, in order to apply the change you will need to restart the application.

**Window Menu**

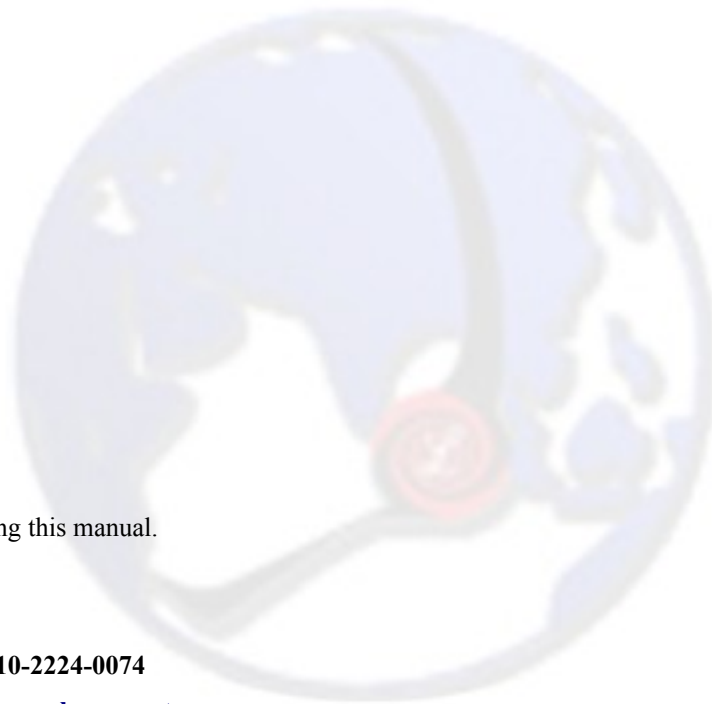
You can tile or cascade open windows.

**Help menu**

The help menu open the same window when user presses F1.

**On-line Update**

On-line update menu updates the software to the latest available version.




Thank you for reading this manual.

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