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Enterprise CRM

Manual

Luxsys Inc.

Contents

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.

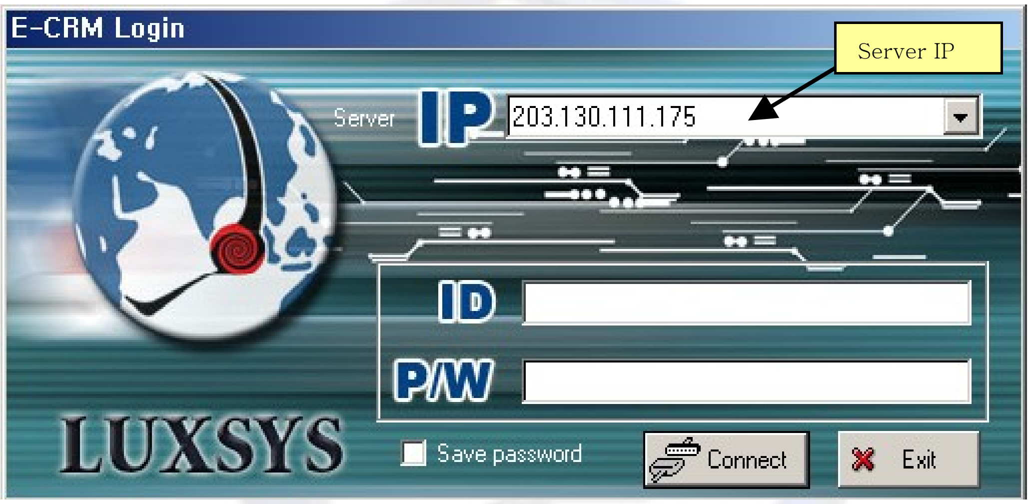
On the other hand, the log information from each call are stored on the Client/Server database. Such information with help of CRM/DSS by being transformed into valuable knowledge can be used to analyze the customers' behavior and help managers to optimize their telephone system for more productive usage. 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.

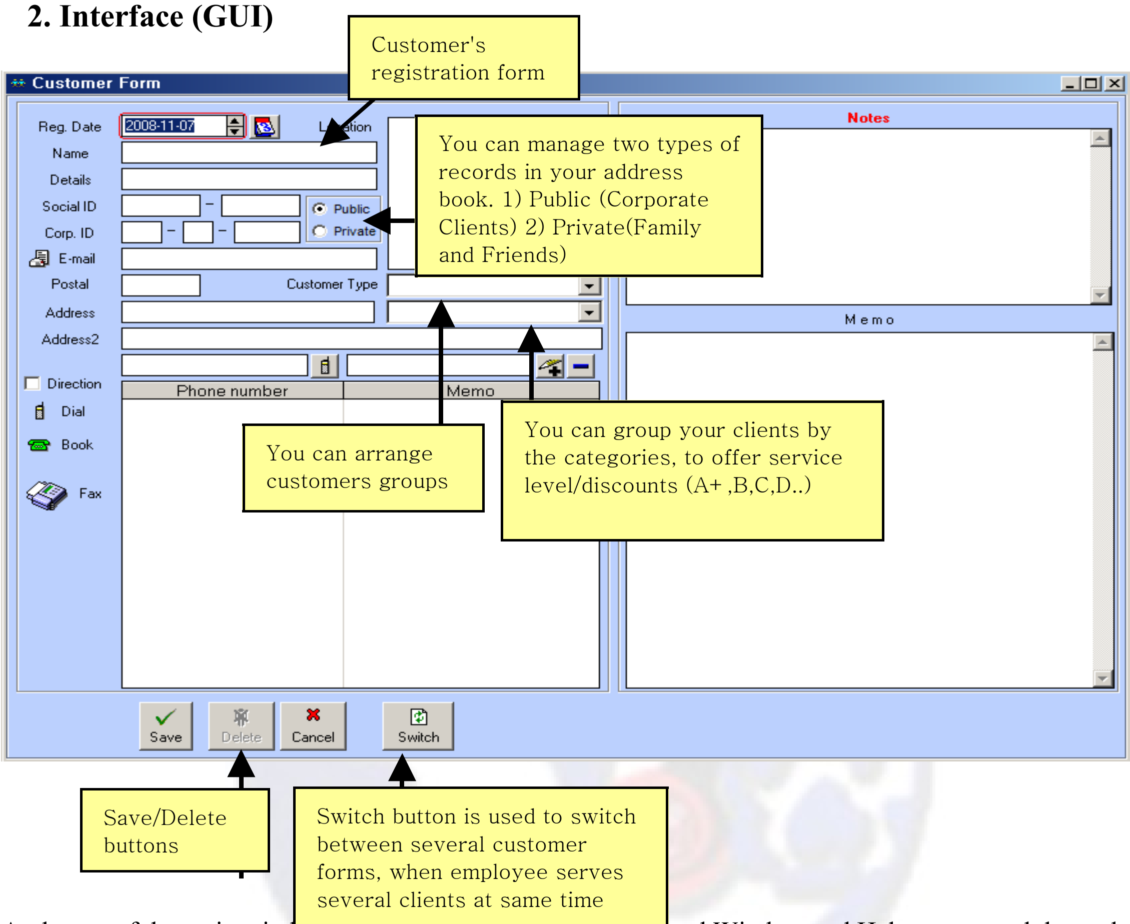
– Tab key to navigate forward to the next field.

– 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 av ailable for download.

2. Interface (GUI)



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.

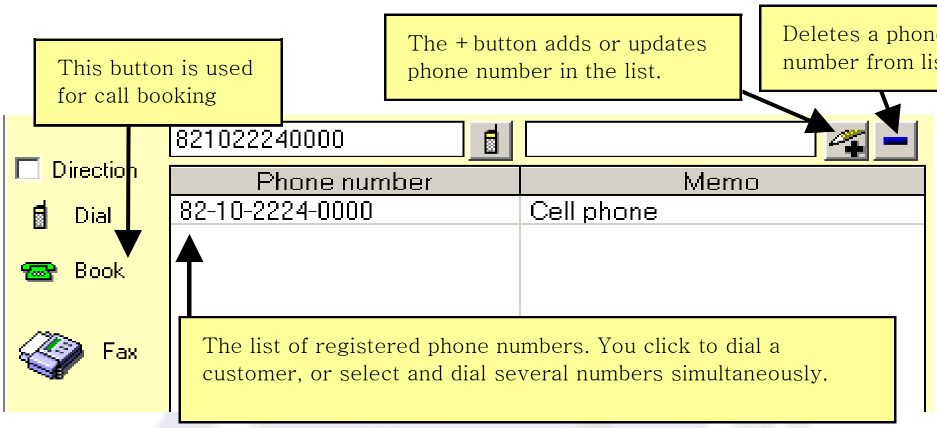
Address : Main address.

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.



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.

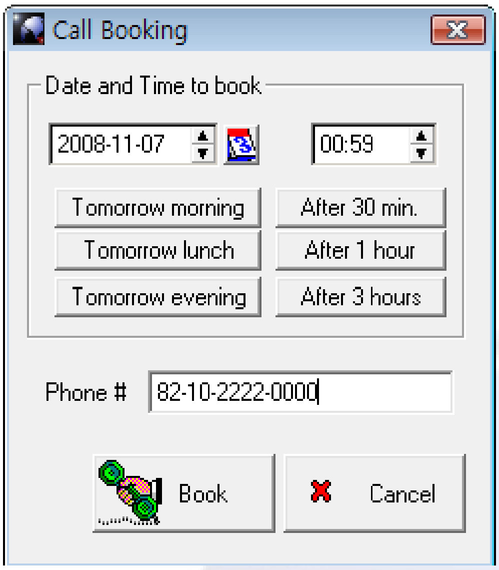
You can add not only telephone numbers, but also SIP:URI numbers, that can be used with Click-to-Dial feature, to place free peer-to-peer calls.

– 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 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.

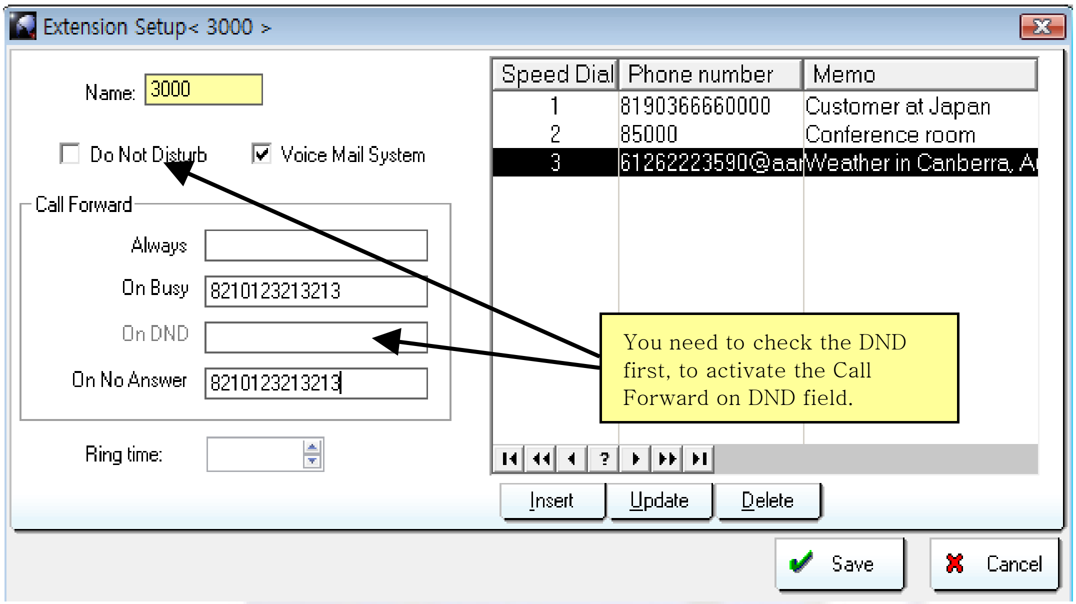
After 1 hour: This button sets time after 1 hour.

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

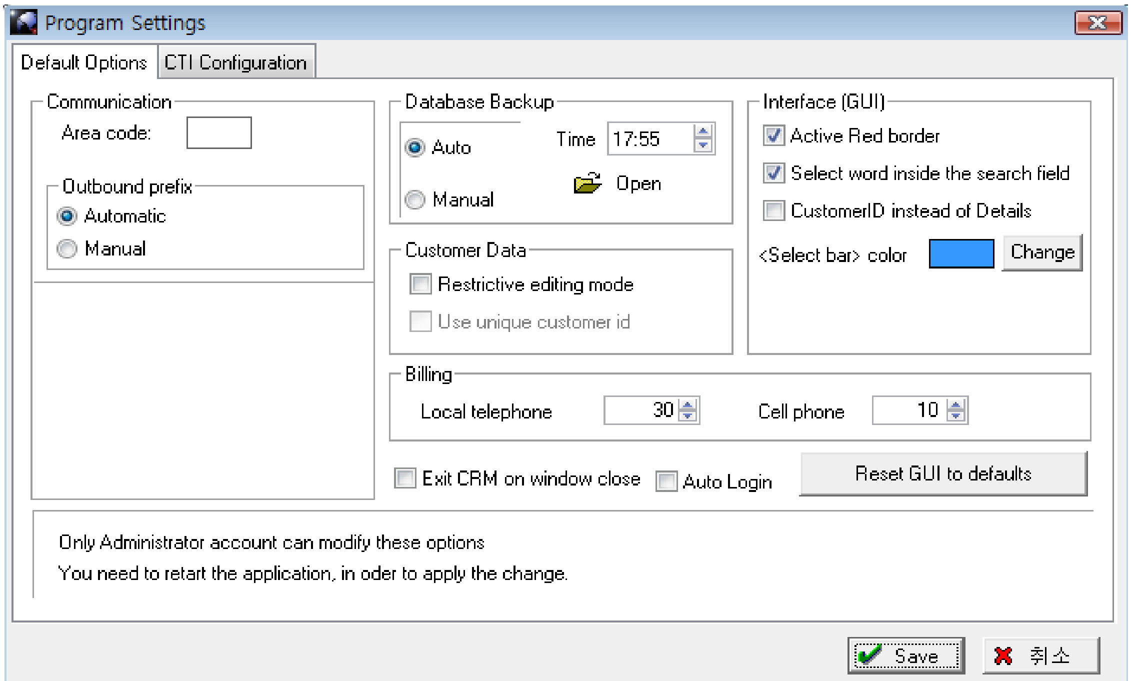


The phone setup windows, configures the PBX features for your extension, you can check current status of the settings. When employees are leaving their sits for the lunch, they can quickly route calls with call forwarding featuer to their mobile phones.

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”

On voip-info.org portal you can learn other free SIP numbers as well.

3. Program Settings



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

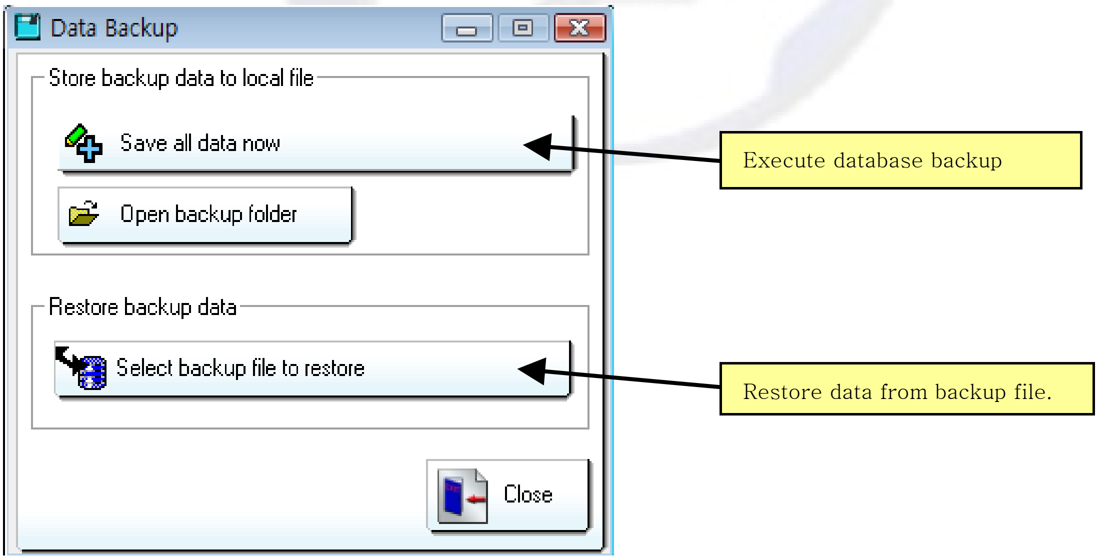
Ex.) _*91. : The feature code that starts with underscore sign (-), you need to dial *91 code and number to setup together at once,*917000

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

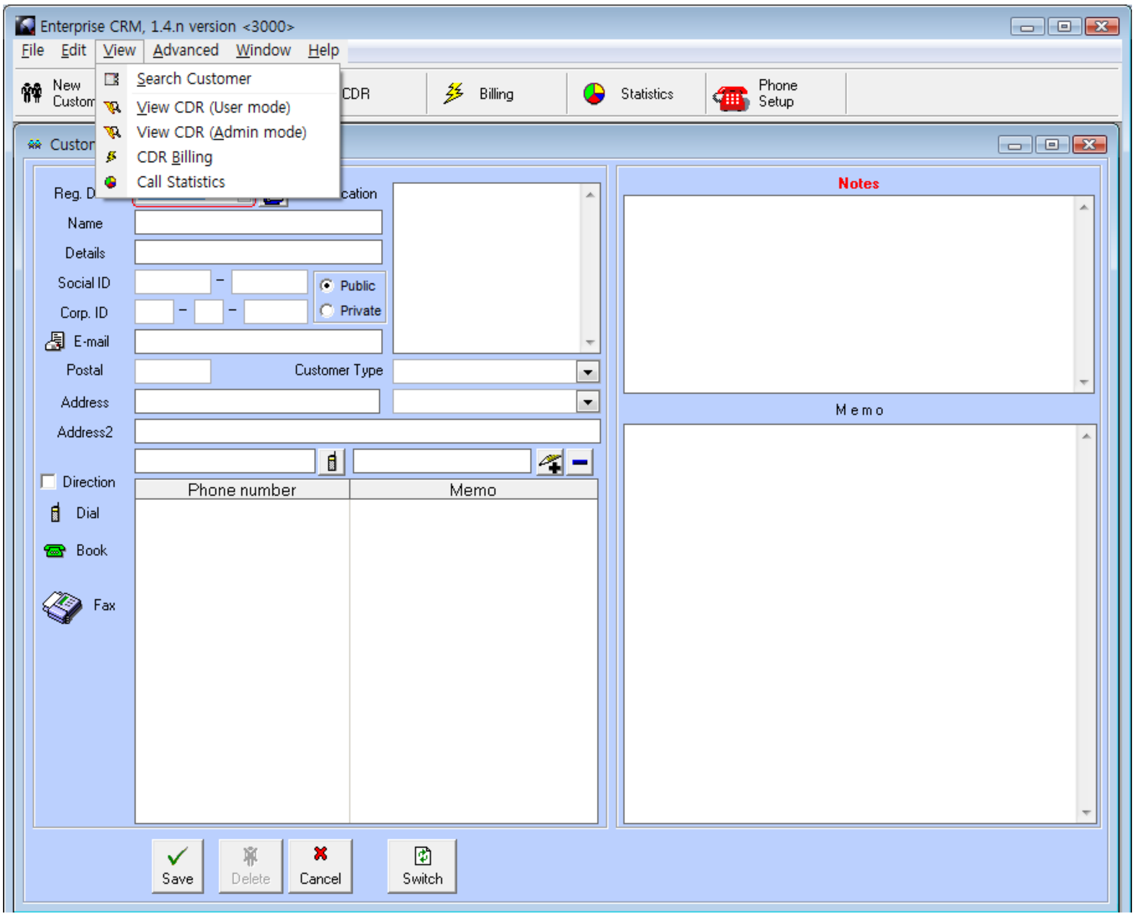
Search Customer

View CDR (User mode)

View CDR (Admin mode)

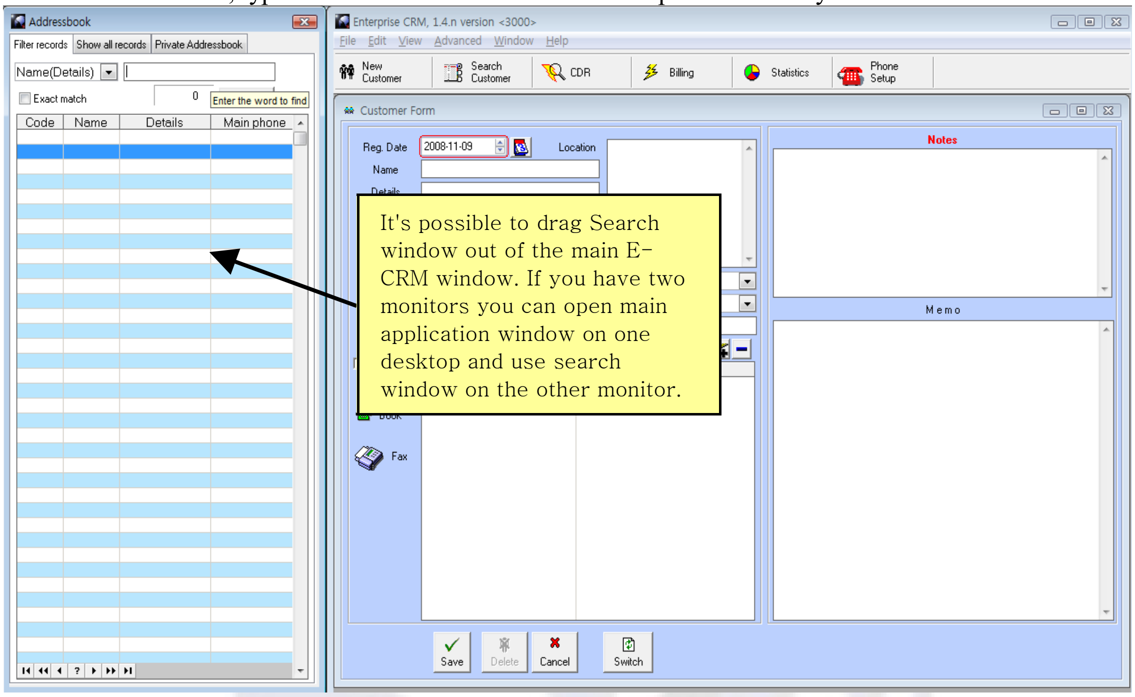
CDR Billing

Call Statistics

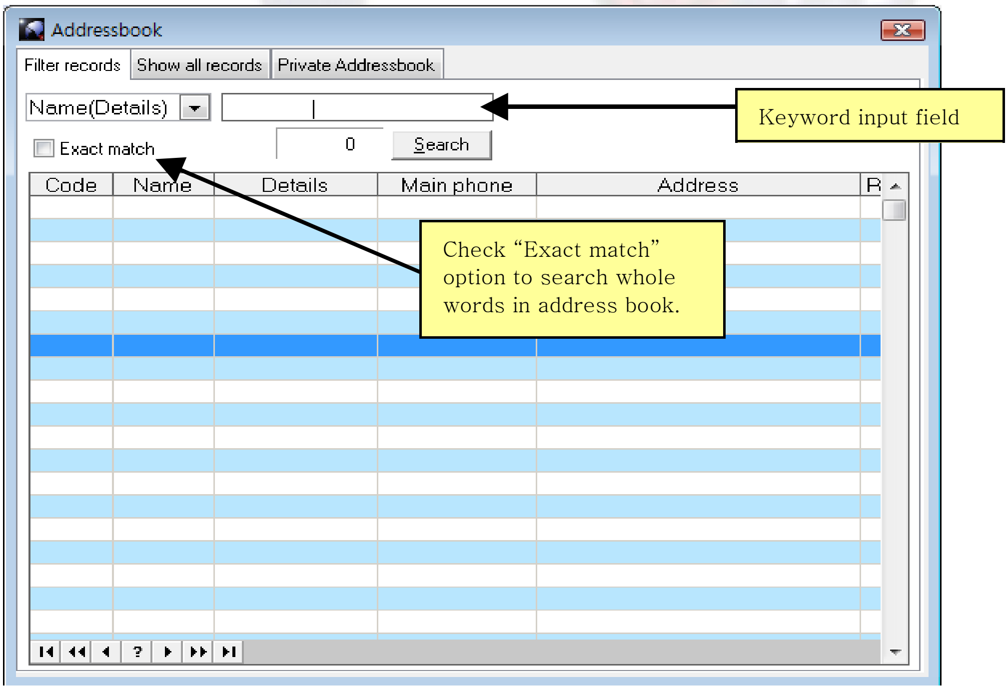


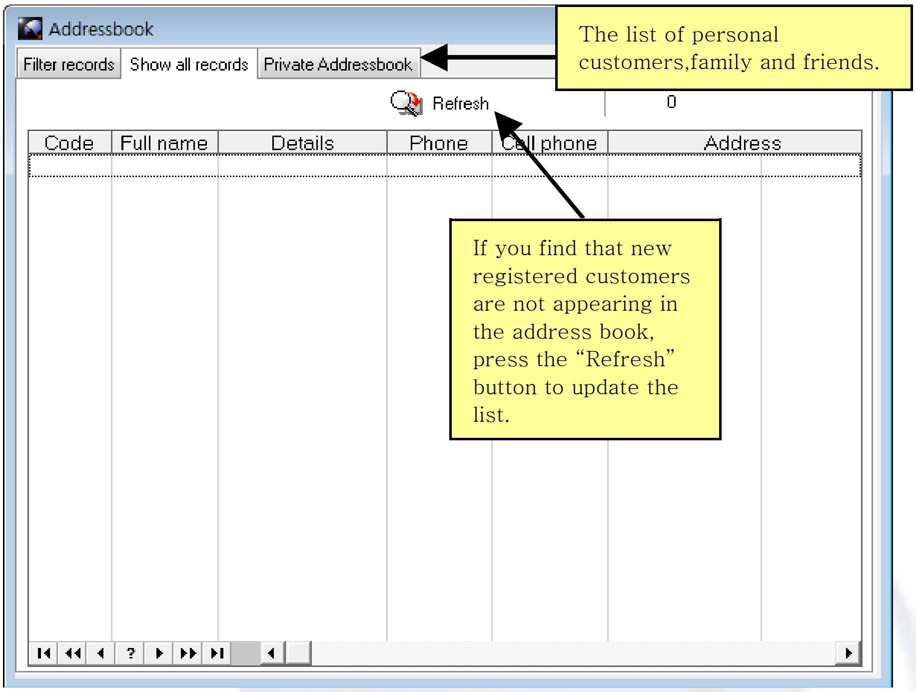
1. Search customer

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



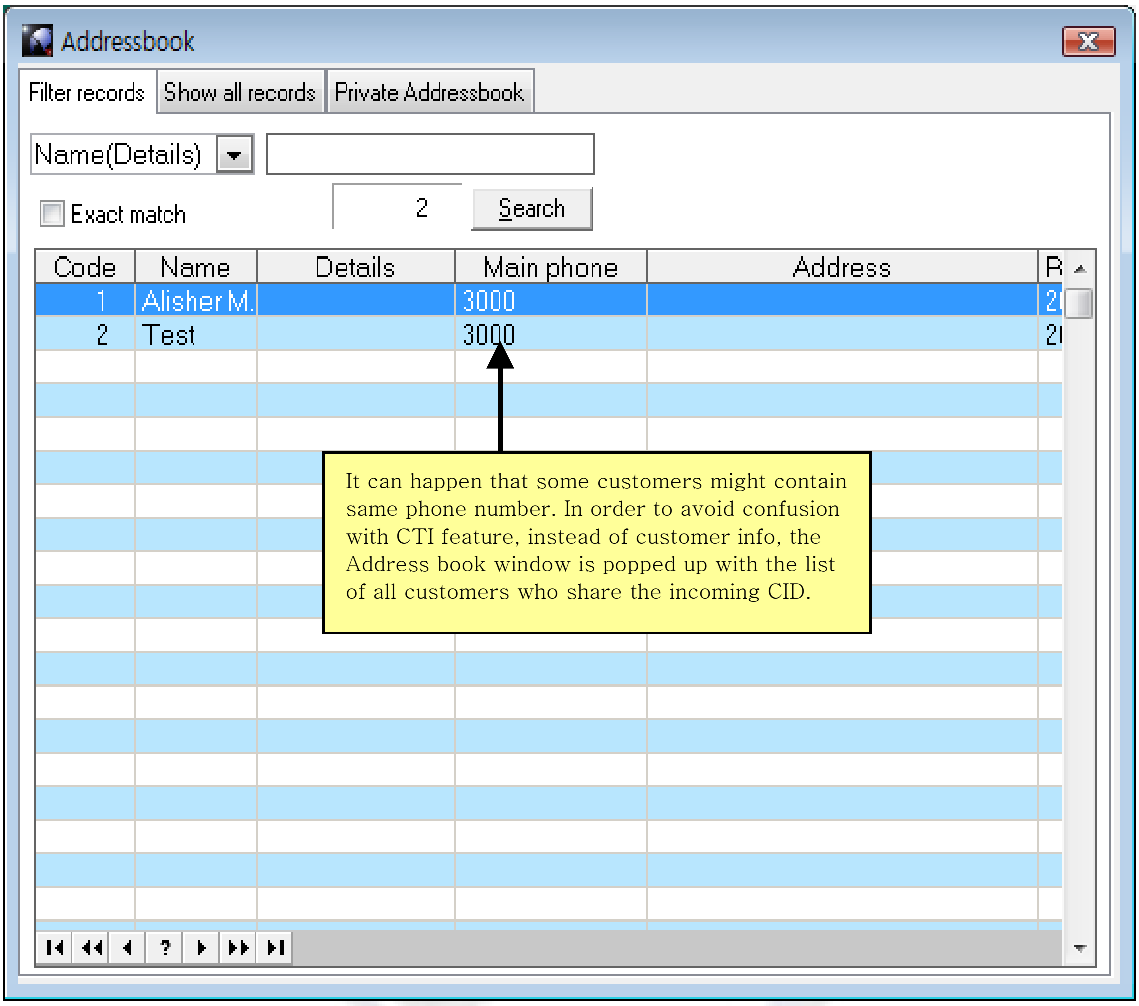
The “Address book” window:



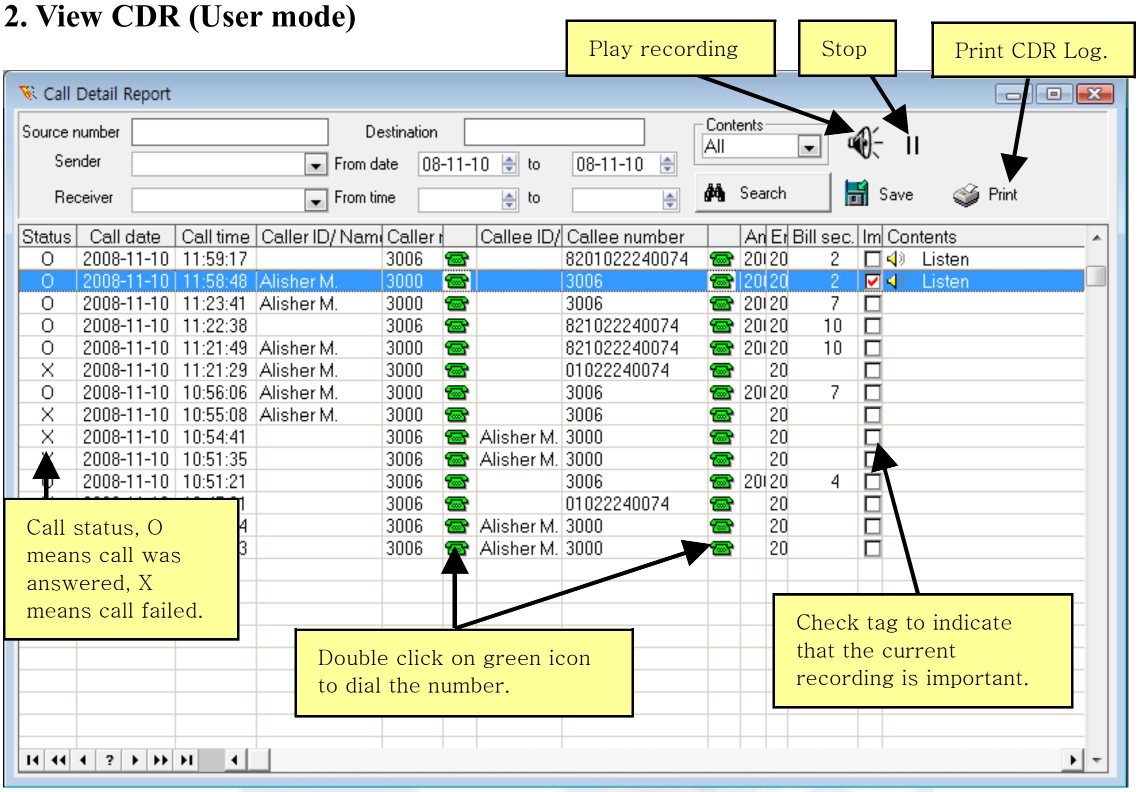


It's recommended to use filter records tab when the customer database is large. In the “Filter records” tab users can search customers by name, phone number, address, groups and categories. The “show all records” retrieves all records of corporate clients from the address book. It's possible for users 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:

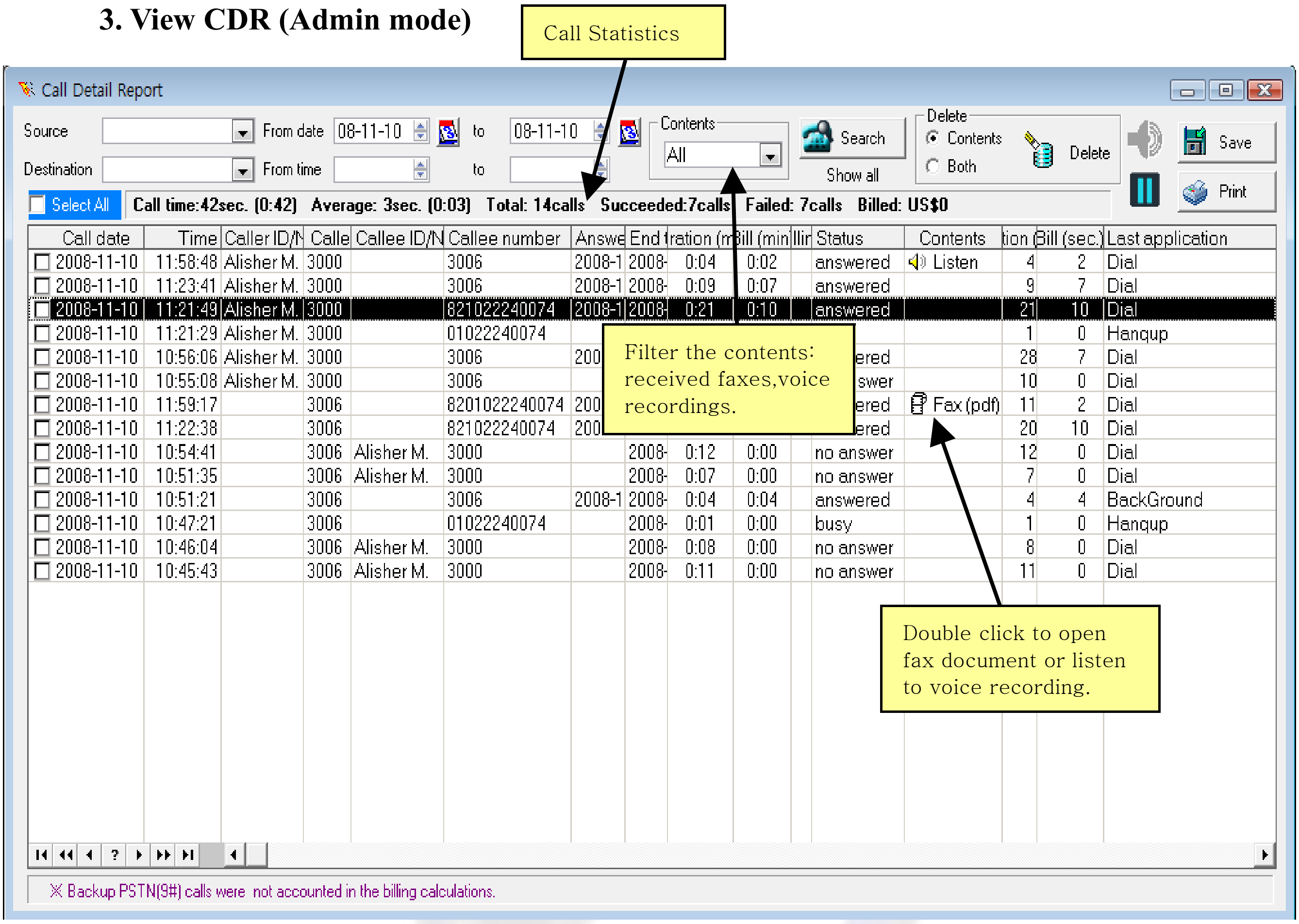

Addressbook
Filter records
Show all records
Private Addressbook
Name(Details)
Exact match
2
Search
Code
Name
Details
Main phone
Address
1
Alisher M.
3000
2
Test
3000
It can happen that some customers might contain same phone number. In order to avoid confusion with CTI feature, instead of customer info, the Address book window is popped up with the list of all customers who share the incoming CID.

2. View CDR (User mode)



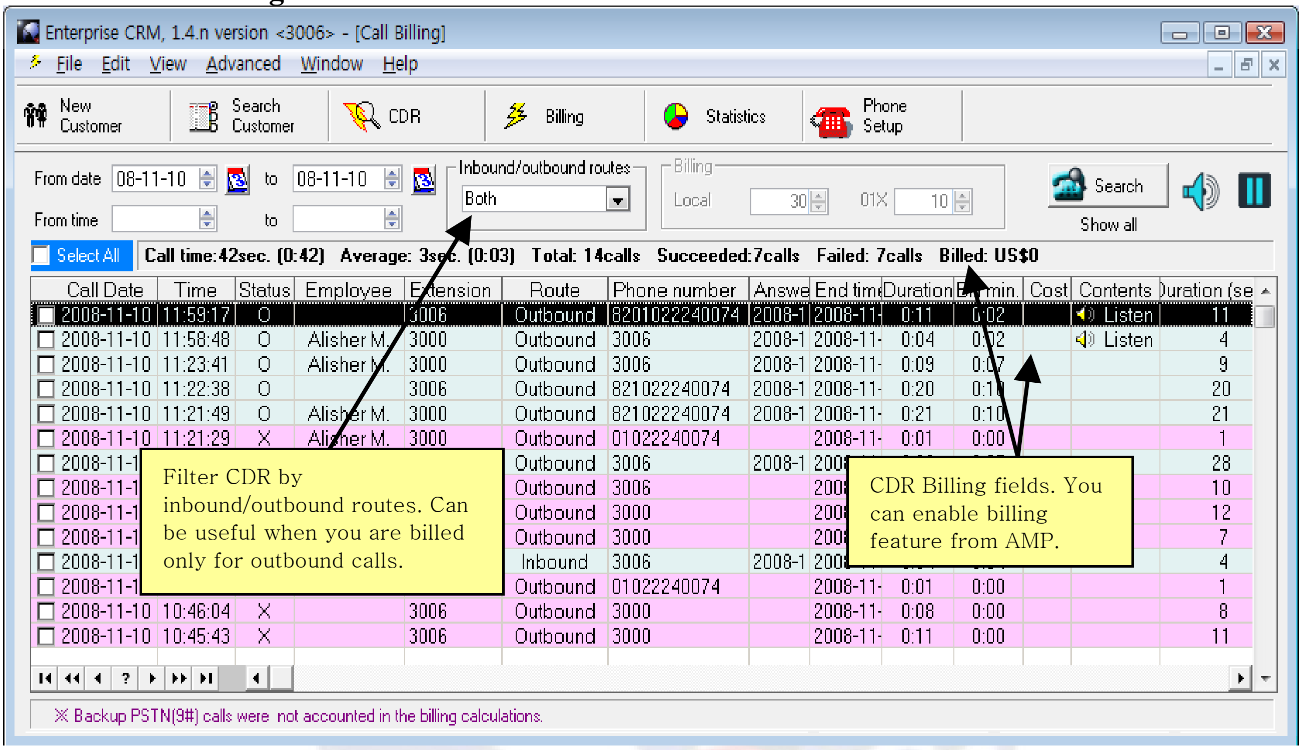
The user mode view CDR window shows only call records that are related to logged user. In the user mode, it's possible to backup and print the CDR. However users cannot delete the contents of cdr.

3. View CDR (Admin mode)



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



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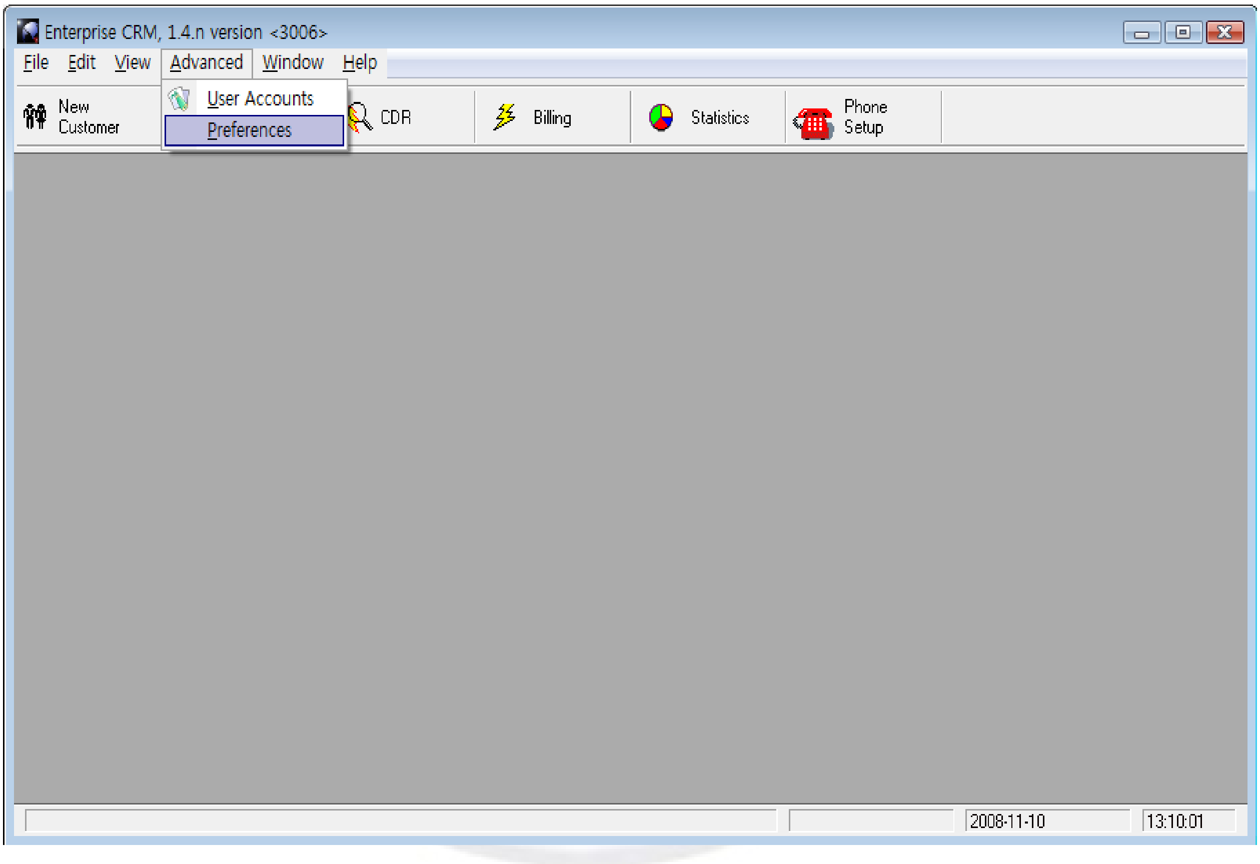
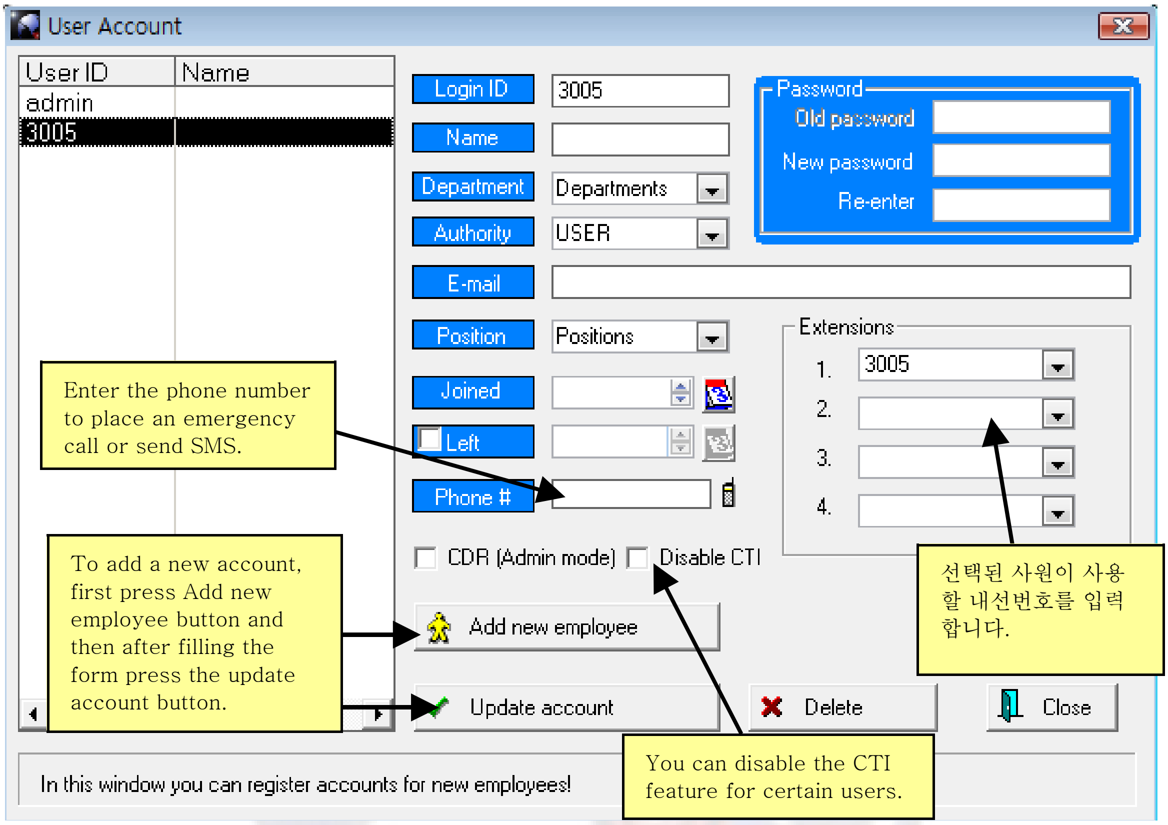
Advanced Menu

User Accounts
Preferences



1. User Accounts



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.

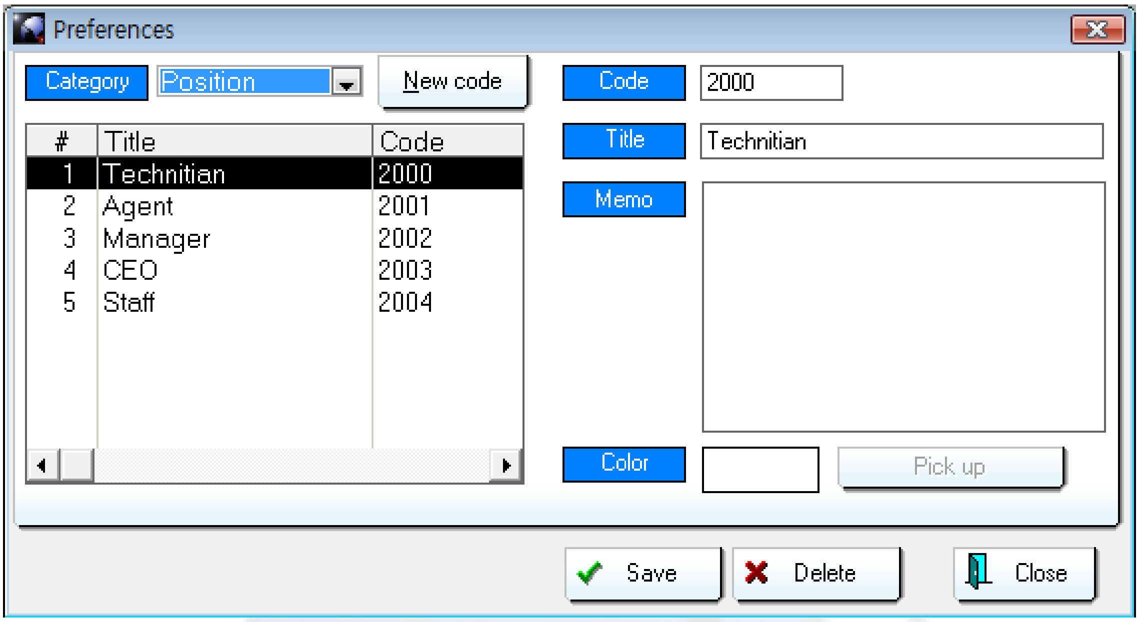
Position : The position of the employee.

Joined : The account registration date.

Left : The date when account was disabled.

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

2. Preferences



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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