



Installation Guide

3CX CRM Plugin for Autotask

Single Tenant Version

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Introduction

The 3CX CRM Plugin for AutoTask creates a seamless integration between AutoTask and 3CX. The solution consists of three main components:

- **A web portal:** used to authorize extensions to use the 3CX CRM Plugin for AutoTask
- **A CRM plugin for 3CX Phone for Windows:** The plugin displays call notifications, performs screen-pops for incoming calls, and automates outbound calls. For inbound calls the plugin instructs AutoTask to display either a Account, Contact, Ticket, or search screens. The plugin also supports integration with the optional Desk Director add-in.
- **An Integration Server:** The Integration Server manages communication between the client plugin and AutoTask, and authenticates extension licensing.

Installation

1

Download software

There are two installers - a [server installer](#) that is run on the 3CX server (includes the AutoTask Integration Server, the VoIPToys Licensing Server, and VoIPToys Relay Agent), and a [client installer](#) which is run on each workstation. You can download the installers here:

<http://www.voiptools.com/3cx-crm-plugin-for-autotask>

2

Install Prerequisites

There are a number of prerequisites that must be installed prior to installing 3CX CRM Plugin for AutoTask. Ensure that your system is ready with requirements and prerequisites mentioned in this guide for both server and client installers.

3

Install 3CX CRM Plugin for AutoTask (Server)

The step-by-step instructions guide you to successfully install 3CX AutoTask Integration Server. Begin by extracting the installer from the downloaded zip file (Step 1 above), then run the setup program named **AutoTask3CXInstaller.exe**

4

Install 3CX CRM Plugin for AutoTask (Client)

The step-by-step instructions guide you to successfully install 3CX AutoTask Client Server. Begin by extracting the installer from the downloaded zip file (Step 1 above), then run the setup program named **AutoTaskPluginInstaller.exe**

5

Register your License Key

Licensing for the AutoTask plugin is based on the number clients needed. You must purchase a license key which is installed during the server installation process.

Autotask Integration Server

Requirements

Before installing 3CX Competitive Wallboard, you need to ensure that your computer meets the minimum requirements mentioned below:

1. 3CX Version 12 64 bit (licensed Edition)
2. Windows 7, 8, 8.1 Pro, Windows Server 2008, R2, and 2012, R2 64bit
3. Microsoft .Net 4.5
4. SQL Server 2012 (including Express) or newer
5. Open TCP ports 6700 and 8700 on the 3CX server's Windows firewall Prerequisites

Prerequisites

Prior to installing the 3CX CRM Plugin for AutoTask solution, the following prerequisites must be completed:

1. Install Microsoft SQL Server 2012 (or newer) or identify an existing SQL Server instance that can be used by the 3CX CRM Plugin. The Integration server needs to maintain information for its internal processes in a Microsoft SQL Server database.



The Integration server can use the free "Express" edition of SQL Server. It is recommended that you also install SQL Server Management Studio

2. If you are running a firewall directly on your 3CX server, you will need to open TCP ports 6700 and 8700 prior to starting the install of the integration server. The client plugin communicates with the Integration Server using these TCP ports.

The client plugin determines what AutoTask screen to display based on the type of inbound call. For example, if the call is coming from a sales queue, an account or contact screen should display. If the call is coming from a support queue, a ticket screen should display.

The plugin determines whether an inbound call should display contact or ticket information based on the origin (queue extension number) of the call. A mapping of queue extensions to screen-pop types (contact or ticket) will be performed during the install.

Step by step Installation Procedure

The following section guides you through a detailed walk-through of the installation process. Start with the Server installation which must be performed on the 3CX server.



The CRM Plugin communicates with the Integration Server using TCP ports 6700 and 8700. If you are running a firewall directly on your 3CX server, you will need to open these ports in the firewall prior to starting the install.

Step 1: Download server installer

You can check for the software download link included in your order confirmation email. As an alternative, you can also find the link from your order history on our website.

Step 2: Extract the installer from the downloaded .zip file

The file you downloaded in the above step is a compressed .zip file.

1. Position the mouse on the zip file and right-click.
2. From the popup menu, select **Extract All** to extract the software.

Step 3: Start the installation process

1. From the extracted folder, find and double-click the file **AutoTask3CXInstaller.exe**
2. You will be prompted to allow administrative access to perform the install. Click **Yes** to continue the installation.

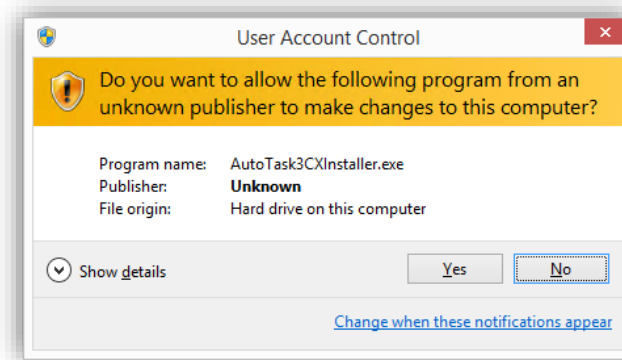


Figure 1: User Account Control

3. Click **Next** on the initial Setup Wizard screen.

Step 4: Download the VoIPTools 3CX Relay (if required)



All BVoIP products communicate with 3CX through the VoIPToys Relay Service. The relay service enables multiple BVoIP products to communicate with 3CX through a single consistent connection.

1. Press **Click here if you need to install / upgrade 3CX Relay Services** to download and start the Relay Agent Installer.
2. On the initial Relay Agent Setup Wizard screen press **Next**.

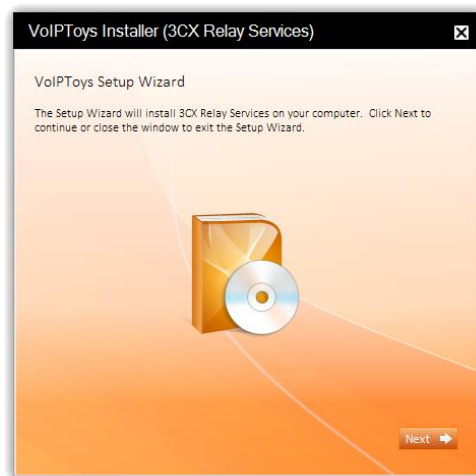


Figure 2: Relay Agent Setup Wizard

The Relay Agent installer will complete the installation of the 3CX Relay Services windows service and start the service.

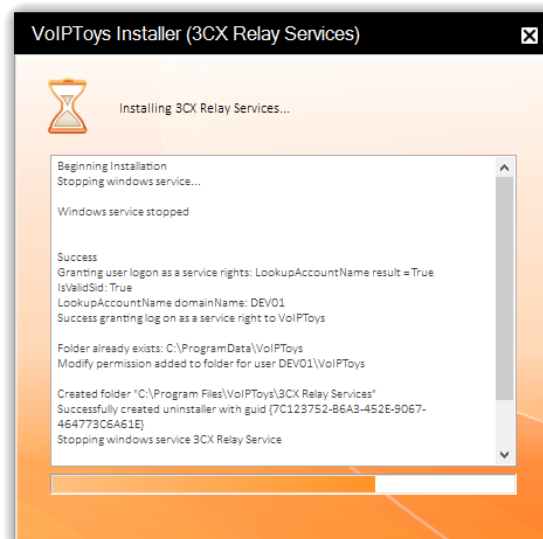


Figure 3: Relay Agent Install Progress Screen

3. Once the Relay Agent installation has completed successfully the Installation Complete screen will display. Press **Close** to close the Relay Agent installer and return to the Integration Server Installer.

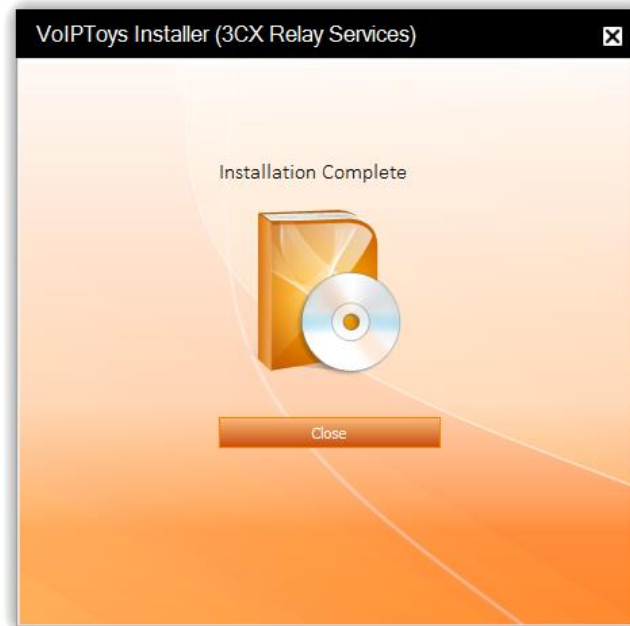


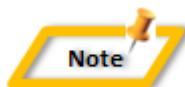
Figure 4: Relay Agent Installation Complete Screen

Step 5: Test the VoIPTools 3CX Relay Settings

1. On the Integration Server installer screen, press **Test Relay Settings** to confirm you can communicate with the Relay Agent. You should see a "Test success!" message.
2. After a successful Relay test, press the **Next** button to continue with the installation of the Integration Server.

Step 6: Configure the Database

1. On the SQL Database Connection screen, press the **Configure** button to setup a connection to SQL Server.



You can let the installer create the SQL Server database for you, or you can manually create the database using Microsoft SQL Server Management Studio. The installer will create the necessary SQL objects for you automatically.

- The Connection Properties screen will display. Use this screen to define your SQL Connection string. In the Server name field enter the SQL Server Instance name (example: SQLServerName\SQLExpress).

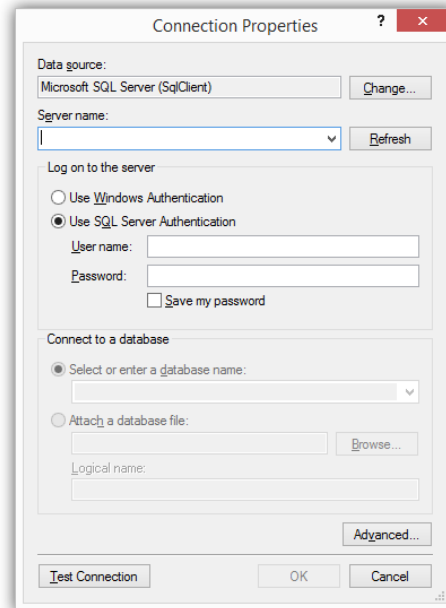


Figure 5: SQL Connection Properties Screen



The Integration Server installer will automatically create a local “VoIPToys” user account. This account authenticates to SQL server and is given the necessary access permissions to update the database. The Integration Server license service also uses this account.

- Select **Use Windows Authentication**. SQL Server technical administrators can alternatively select **Use SQL Server Authentication** and specify a SQL Login account.
- To have the installer create the database for you, leave the **Select or enter a database name** field blank. To use a pre-existing database, select the desired database from the drop-down list.
- Press the **Test Connection** button to confirm connectivity to SQL Server.
- Press **OK** to save the SQL Connection information.
- Press **Next** to create the required SQL database objects. The Integration Server installation status screen will display the installation progress.

Step 7: VAD Project Installation

One of the features of the AutoTask Integration server is the ability to prompt callers for their ticket number. This feature must be installed on the 3CX server. The Voice Application Designer (VAD) Project Installer will create a Digital Receptionist called “AutoTask Integration”. To prompt callers for their ticket number simply route calls to this extension.

1. The 3CX VAD application installer will display. Press **Deploy to local 3CX** to complete the VAD application installation.

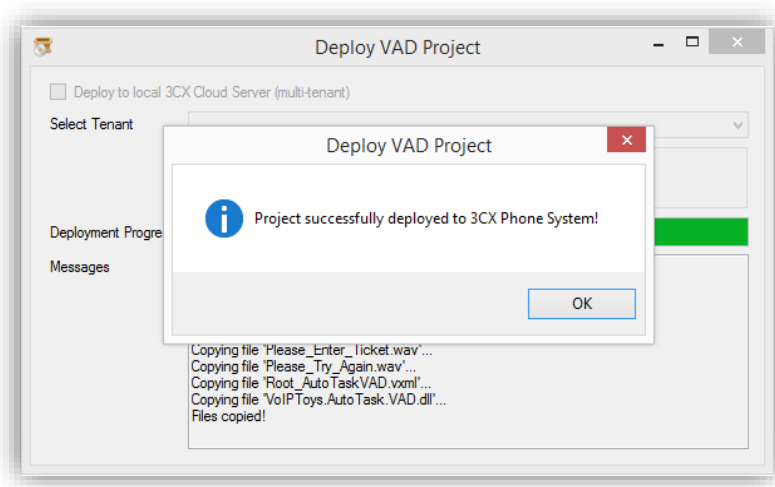


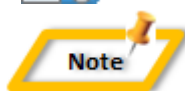
Figure 6: Deploy VAD Project Screen

2. Press **OK** to close the VAD success dialog.
3. Upon completion of the VAD installer, press the red **X** on the **Deploy VAD Project** screen to complete the Integration Server installation process.
4. Press **Run Application** to run the Site License Distribution Server.

Step 8: Voip toys Site License Distribution Server



The Integration Server installer will create a desktop shortcut to the licensing configuration application.



Note

This program collects your license information and registers your license key for use with the 3CX server.

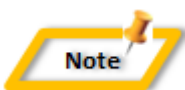
A license key is provided when you purchase 3CX CRM Plugin by VoIPToys. The license key will specify the number of endpoints (3CX CRM Plugin for AutoTask) that are permitted to register to the license server.

1. Click on the licensing configuration shortcut to start the configuration application.
2. Enter the license key and end-user contact information on the **Server License** tab and press **Register** to activate your license key. After the key has successfully registered, your purchased license information will display on the top portion of the screen.



Pay particular attention to the number of licenses shown in the **Licenses** field. This is the number of authorized endpoints. The **Activation** field shows when your key was activated. You are eligible to receive free software updates for one year.

3. You can manage the list of endpoints registered to the AutoTask Integration Server on the **Endpoints** tab. This tab displays pertinent information about the registered workstations, and displays the total number of licenses available and the number of licenses in use.



You can reclaim a registration by highlighting the PC no longer in use and pressing **DELETE**. This process will disable the endpoint from the list and return the license to the total number of licenses available for endpoints.



If a software update is available for download, a message will display next to the **Check for Updates** button. Pressing this button will download an updated installer to your desktop. You can then run the installer to update the software.

4. Configure the AutoTask server settings. These settings will be downloaded into the clients upon installation.

Step 9: AutoTask Live Links

The 3CX CRM Plugin for AutoTask can automate outbound calls through the use of AutoTask Live Links.

When navigating to an AutoTask Accounts, Contacts, or Ticket screen you will notice a menu option titled **Live Links**. Selecting this menu option will display a **Live Link** that when clicked will show a dialog that lists one or more phone numbers. In the example above, selecting **Live Links → 3CX Ticket Phone Control** from the ticket screen will display the following dialog:

Clicking on one of the phone number links will:

- Initiate an outbound call to the selected number
- Create a note for the ticket containing summary information about the call
- Attach a recording of the call to the ticket (provided that the 3CX extension is configured to record all calls)

The process of automating outbound calls through Live Links is identical for Accounts, Contacts, and Tickets.

To utilize this functionality within AutoTask you must install three LiveLinks:

- 3CX Account Phone Control
- 3CX Contact Phone Control
- 3CX Ticket Phone Control

To install the live links:

1. Login to **AutoTask** and hover over the **AutoTask** icon
2. Navigate to **ADMIN → Extensions and Integrations**
3. Expand the **AUTOTASK ADD-ON** section
4. Click on the **LiveLinks Designer** link
5. Press the **Explore the AXN LiveLinks Catalog** button
6. On the right-hand pane select the **Explore the AXN LiveLinks Catalog** tab. A catalog search screen will display.
7. Enter **3CX** in the **LiveLink Name** field and press **Search**. You should see the three 3CX Links in the results screen.
8. To install the three 3CX LiveLinks, right click on a row and choose Install **LiveLink**.



3CX CRM Plugin for AutoTask (Client)

The 3CX CRM Plugin for AutoTask has a client application (plugin) that integrates with 3CX Phone for Windows. The plugin displays inbound call information and instructs AutoTask to display the caller's contact or ticket information.

Requirements

1. 3CX Phone for Windows
2. Windows 7, 8, 8.1, Windows Server 2008, R2, and 2012, R2 64bit
3. Microsoft .Net 4.5
4. Open TCP ports 6700 and 8700 on the 3CX server's Windows firewall
5. Installation of the client directly on the 3CX server is not supported

Prerequisites

Install 3CX Phone for Windows on the client PC prior to installing the CRM plugin

Download

The CRM Plugin client installer is run on each workstation. You can download the installers here:

<http://www.voip toys.com/3cx-crm-plugin-for-AutoTask>

Licensing for the AutoTask plugin is based on the number clients you need. You will need to purchase a license key which is installed during the server installation process.

Installation

Step by step Installation Procedure

Step 1: Download client installer

You can check for the software download link included in your order confirmation email. As an alternative, you can also find the link from your order history on our website.

Step 2: Extract the installer from the downloaded .zip file

The file you downloaded in the above step is a compressed .zip file.

1. Position the mouse on the zip file and right-click.
2. From the popup menu, select **Extract All** to extract the software.

Step 3: Start the installation process

1. From the extracted folder, find and double-click the file **AutoTaskPluginInstaller.exe**
2. You will be prompted to allow administrative access to perform the install. Click **Yes** to continue the installation.
3. Click **Next** on the initial Setup Wizard screen.

Step 4: Download the VoIPTools 3CX Relay (if required)



All BVoIP products communicate with 3CX through the VoIPToys Relay Agent. The relay agent makes it possible for multiple products to communicate with 3CX through a single consistent connection.

1. Enter the appropriate host and port for the relay agent. This will always be the host name of the 3cx server and port 8700 for single tenant environments. For multi-tenant environments the port number will be different for each tenant.

Step 5: Test the VoIPTools 3CX Relay Settings

1. On the CRM Plugin installer screen, press **Test Relay Settings** to confirm that you can communicate with the Relay Agent. You should see a **Test success!** message.
2. After a successful Relay test, press the **Next** button to continue with the installation of the CRM Plugin.
3. When the CRM plugin installation is complete, press **Run Application** to start the CRM Plugin configuration program.

Step 6: Configure AutoTask

The CRM plugin configuration screen manages the settings necessary for the plugin to login and communicate with AutoTask.

1. Enter the necessary configuration settings and press **Save**
2. Press the **Restart 3CX Phone** to apply the changes.

The following table describes each of the CRM configuration settings:

Setting	Description
Auto Task Screen Pop Open Option	Indicate when the screen pop will happen. Valid values are “RINGING” and “ANSWERED”.
Auto Task Debug	Log additional debug information. When set to true, the AutoTask plugin will log extra debug information to a text file for troubleshooting purposes. Valid values are ‘true’ or ‘false’.
Auto Task Ticket Queue List	List the queues that pop the support ticket screen. A comma separated list of queue extension numbers. Only the first queue in the list can pop specific ticket numbers.
Auto Task Company Queue List	List of queues that pop the company/contact screen. A comma separated list of queue extension numbers.
Auto Task Relay Services DNS Name	Host name of the 3CX server
Auto Task Relay Services Port	TCP port number used to communicate with the relay agent. This will always be 8700 in a single tenant environment. In multi-tenant environments this number will vary. You must take note of the port number specified when you initially install the relay agent on the 3CX server.
Auto Task Desk Director Integration	Integrate with Desk Director. Valid values are ‘true’ or ‘false’
Auto Task User Name	AutoTask login user name
Auto Task Password	AutoTask login password

Figure 28: CRM Plugin settings

Step 7: Restore AutoTask Plugin Configuration

When the AutoTask plugin is installed on a PC, the 3CX Phone for Windows configuration file is updated to load the AutoTask plugin. Unfortunately, when 3CX releases an automatic update for 3CX Phone for Windows, their updater deletes all plugin information.

To restore the AutoTask plugin configuration information in the 3CX Phone for Windows configuration file, open the AutoTask 3CX Plugin Configuration screen and press **Restart 3CX Phone**.

Step 8: Enable Integration with Desk Director

Desk Director is a 3rd Party Add-on for AutoTask. Enabling integration with Desk Director is very simple. On the AutoTask 3CX Plugin configuration screen:

1. Enter **true** in the **AutoTask Desk Director Integration** field.
2. Press **Save** to update the plugin configuration.
3. Press the **Restart 3CX Phone** The plugin will open Desk Director whenever a caller has specified a ticket number.

Web Portal

The web portal allows you to specify which 3CX extensions have permission to use the plugin and consume a client licenses. To access the web portal, a user must have 3CX system admin rights.

To configure 3CX admin rights:

1. Log in to the 3CX Management Console
2. Select the extension that will be assigned 3CX System Administration rights
3. Select the **Options** tab
4. Click the **Configure Permissions**

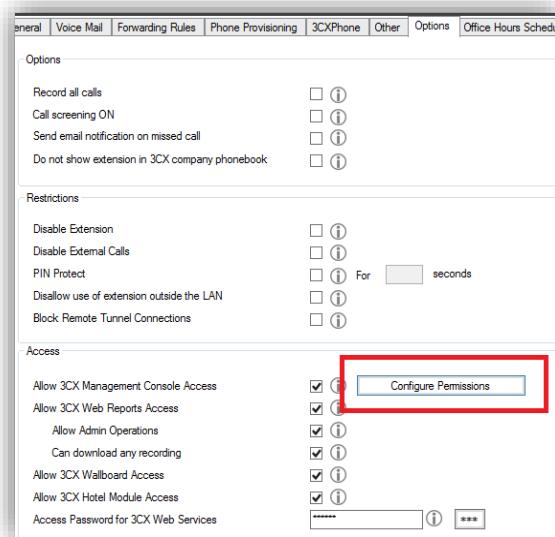


Figure 7: 3CX Extension Permissions

5. Check the **System Administrator** check box and click **OK**

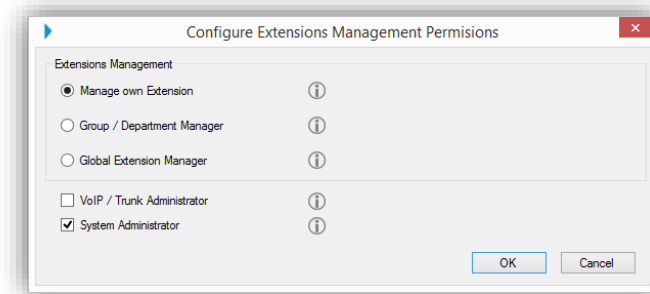


Figure 8: 3CX System Administrator

6. Press **OK** to save the changes