



# User Guide

## 3CX CRM Plugin for AutoTask

Single Tenant Version

"Copyright © VoIPTools, LLC 2011-2016"

Information in this document is subject to change without notice. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission VoIPTools, LLC.

Single Tenant Version – Last updated September 19, 2016

# Table of Contents

Table of Figures..... 3

Introduction ..... 4

Requirements..... 4

Prerequisites ..... 4

    3CX AutoTask Integration Web Portal ..... 5

3CX Call Flow Example (Inbound Calls) ..... 5

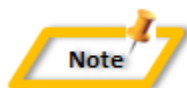
    Designating Sales and Support Queues ..... 7

Live Links (Outbound Calls) ..... 7

# Table of Figures

Figure 1: Inbound Call Routing Example ..... 6

# Introduction



*This guide provides instructions on how to use the 3CX CRM Plugin for AutoTask. For installation instructions, refer to the 3CX CRM Plugin for AutoTask Installation Guide.*

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.

## Requirements

### Windows Client:

- Windows 7, 8, 8.1 Pro 32/64 Bit
- Microsoft .Net 4.5
- Open TCP ports 6700 and 8700 on the 3CX server's Windows firewall
- 3CX Phone for Windows
- 3CX CRM Plugin for AutoTask

## Prerequisites

For the integration between 3CX and AutoTask to function you must ensure ALL of the following prerequisites are completed:

### 3CX Server

1. The server portion of the 3CX CRM Plugin is installed and configured on the 3CX server (See installation Guide).
2. The 3CX AutoTask Integration Windows service is running on the 3CX Server
3. The VoIPToys Relay Windows service is running on the 3CX Server
4. The 3CX extensions have been authorized to use the 3CX plugin on the 3CX CRM Plugin for AutoTask web portal

## Windows Client

1. 3CX Phone for Windows is installed prior to installing the 3CX CRM Plugin for AutoTask client application.
2. The client portion of the 3CX CRM Plugin is installed on each PC (See Installation Guide)
3. AutoTask is running on the Windows PC
4. The user is logged in to AutoTask at all times
5. 3CX Phone for Windows must be running at all times

## 3CX AutoTask Integration Web Portal



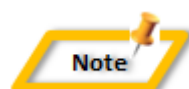
When the 3CX CRM Plugin for AutoTask integration server was installed on the 3CX server, a web portal was also created. The web portal is used to identify which 3cx extensions are authorized to use the 3CX CRM Plugin for AutoTask. You can access the web portal by clicking on the “3CX Integration Server Web” desktop icon on the 3CX server, or you can access the web portal by entering the following URL in your browser:

<http://<3cx-server-ip-address>:6600>

To access the web portal you must login using your 3CX extension number and voicemail PIN. Only 3CX extensions that are configured as 3CX System Administrators can login to the web portal (See installation guide).

To authorize an extension to use the 3CX CRM Plugin for AutoTask, simply place a checkmark next to the desired extensions and press the “Save” button.

## 3CX Call Flow Example (Inbound Calls)



*3CX provides a highly flexible approach to designing inbound call flows. The example below is just one possible approach to designing how inbound calls are routed.*

The 3CX CRM Plugin for AutoTask matches inbound Callers to an AutoTask Account or Contact based on either the caller’s phone number, or by a ticket number entered by the caller. When an Inbound call is received, the 3CX CRM Plugin displays a small notification (toast) in the lower right-hand corner of the screen, and automatically displays the appropriate AutoTask screen (typically when the call is answered).

How calls are routed within 3CX will affect which AutoTask screen is displayed. The diagram below outlines how an inbound call might be routed within 3CX. The example presents the caller with three options: (1) Sales, (2) Support → Existing Case, or (3) Support → New Case.

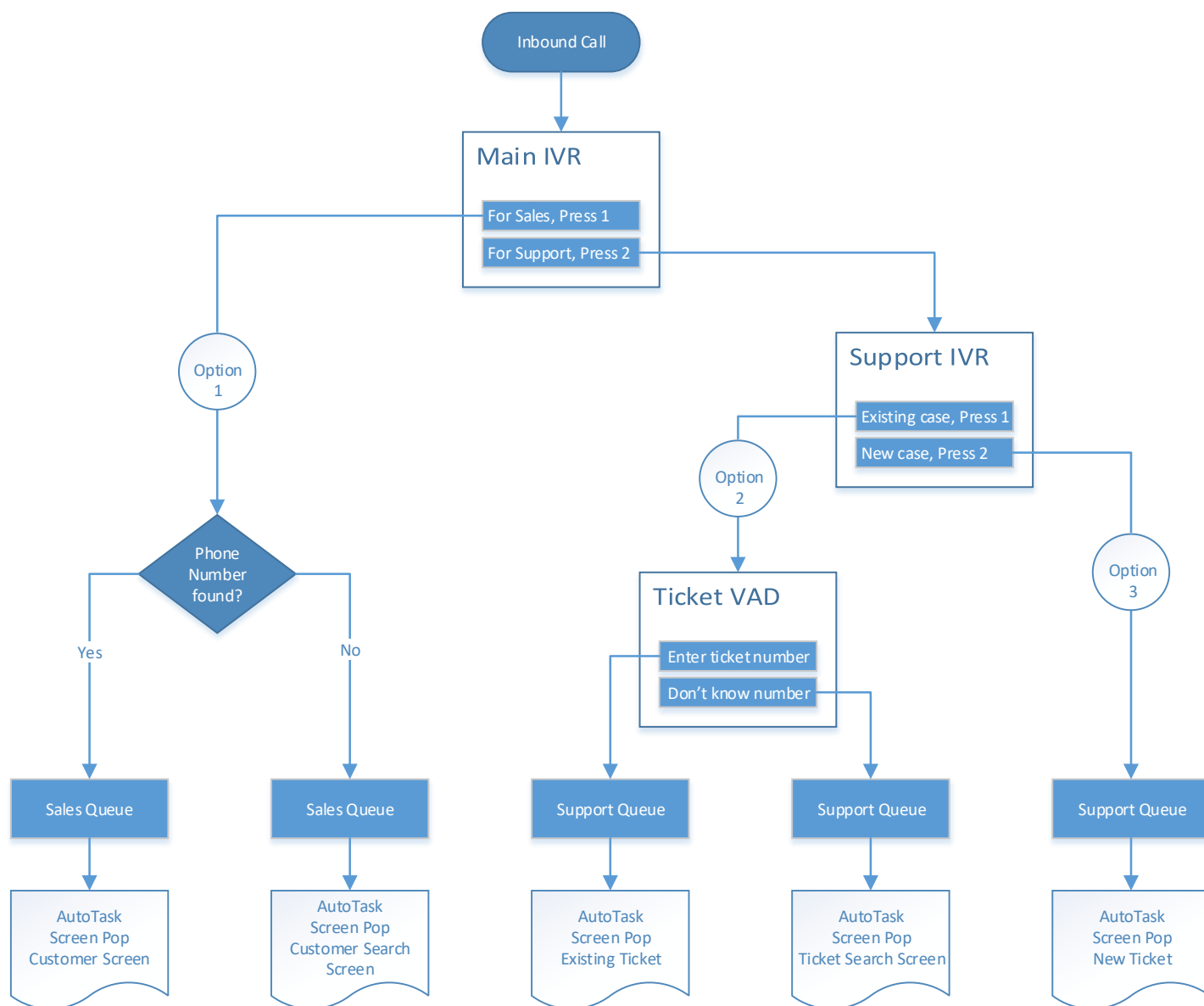


Figure 1: Inbound Call Routing Example

- Selecting “Sales” will direct the caller to a designated 3CX “Sales” queue. If the caller ID (phone number) is found in AutoTask, the Account or Contact screen will display. If the phone number is not found in any of the phone fields the AutoTask Account search screen will display.
- Navigating to “Support → Existing Case” directs the caller to a 3CX Voice Application Designer (VAD) Digital Receptionist that prompts the caller for their ticket number. The VAD application then transfers the caller to a designated 3CX “Support” queue. If the ticket number is found in AutoTask, the ticket will display. If the ticket number cannot be found, the AutoTask ticket

search screen will display.

- Choosing “Support → New Case” will transfer the caller to a designated 3CX “Support” queue. Because no ticket number was specified by the caller, a new ticket is automatically created and displayed in AutoTask.

## Designating Sales and Support Queues

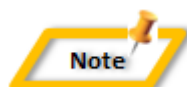
The 3CX CRM Plugin for AutoTask selects the screen to display for inbound calls based on the type of 3CX queue (sales or support) the caller is waiting in. If the caller is waiting in a “sales” queue an Account screen will display, or if waiting in a “support” queue a ticket screen will display.

Identifying a 3CX queue as either a “sales” or “support” queue is typically configured globally by the Integration Server (installed on the 3CX server) but you can override the global settings at each PC.



To identify whether a queue is either a “Sales” or “support” queue at the PC, click on the AutoTask 3CX Plugin desktop shortcut. This will open the AutoTask 3CX Plugin Configuration screen below:

- “Sales” queues are identified by entering the 3CX queue extension number in the “Auto Task Company Queue List” field
- “Support” queues are identified by entering the 3CX queue extension number in the “Auto Task Ticket Queue List” field.



*You can identify multiple queues as either “sales” or “support” by entering a list of extension numbers, separated by commas, in the appropriate field.*

## Live Links (Outbound Calls)

In addition to performing screen pops within AutoTask for inbound calls, the 3CX CRM Plugin for AutoTask can also automate outbound calls through the use of AutoTask Live Links.

Navigating to an AutoTask Account, Contact, or Ticket screen displays a button titled “Live Links” is included on the screen. Clicking on this button will display a “Live Link” 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:**

1. Initiate an outbound call to the selected number,



2. Create a note for the ticket containing summary information about the call
3. Attach a recording of the call to the ticket (provided the 3CX extension is configured to record all calls).

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