



User Guide

3CX CRM Plugin for ConnectWise

Single Tenant Version

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Introduction



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

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

- A web portal: used to authorize extensions to use the 3CX CRM Plugin for ConnectWise
- 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 ConnectWise to display either a Company, 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 ConnectWise, and authenticates extension licensing.

Requirements

Before installing 3CX CRM Plugin for ConnectWise, you need to ensure that your computer meets the minimum requirements mentioned below:

1. Windows 7, 8, 8.1 Pro 32/64 Bit
2. Microsoft .Net 4.5
3. Open TCP ports 6700 and 8700 on the 3CX server's Windows firewall
4. 3CX Phone for Windows
5. 3CX CRM Plugin for ConnectWise

Prerequisites

For the integration between 3CX and ConnectWise 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 ConnectWise 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 ConnectWise web portal

Windows Client

1. Browser Popup Blocker is disabled for the ConnectWise website
2. 3CX Phone for Windows is installed prior to installing the 3CX CRM Plugin for ConnectWise client application
3. The client portion of the 3CX CRM Plugin is installed on each PC (See Installation Guide)
4. ConnectWise is running on the Windows PC
5. The user is logged in to ConnectWise Internet client at all times
6. 3CX Phone for Windows must be running at all times

3CX Phone for Windows

In order for the 3CX CRM Plugin for ConnectWise to function properly, 3CX Phone for Windows must be configured to “Run this program as an administrator”. You can ensure it is always run as an Administrator by navigating to the executable here:

<C:\ProgramData\3CXPhone for Windows\PhoneApp\3CXWin8Phone.exe>

1. Right-mouse click on the executable and choose properties.

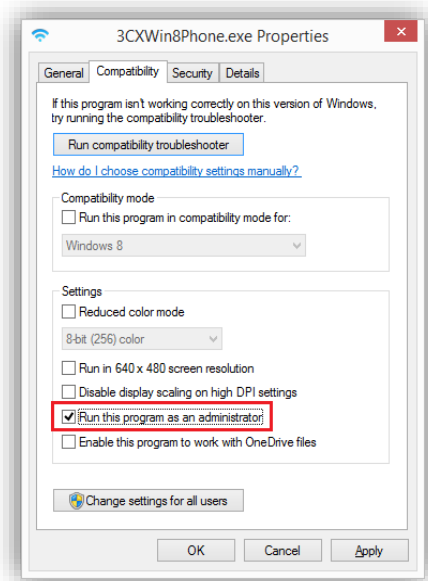


Figure 1: 3CXWin8Phone.exe Properties

2. Select “Run this program as an administrator”
3. Press OK to save the changes

With this change whenever 3CX Phone for Windows is started it will automatically run with the necessary privileges. You will need to reapply this configuration change if you update or reinstall 3CX Phone for Windows.

3CX ConnectWise Integration Web Portal



When the 3CX CRM Plugin for ConnectWise 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 ConnectWise. You can access the web portal by clicking on the “3CX ConnectWise Integration 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>:6200>

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 ConnectWise, 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 ConnectWise matches inbound Callers to a ConnectWise Company 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 ConnectWise screen (typically when the call is answered).

How calls are routed within 3CX will affect which ConnectWise 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.

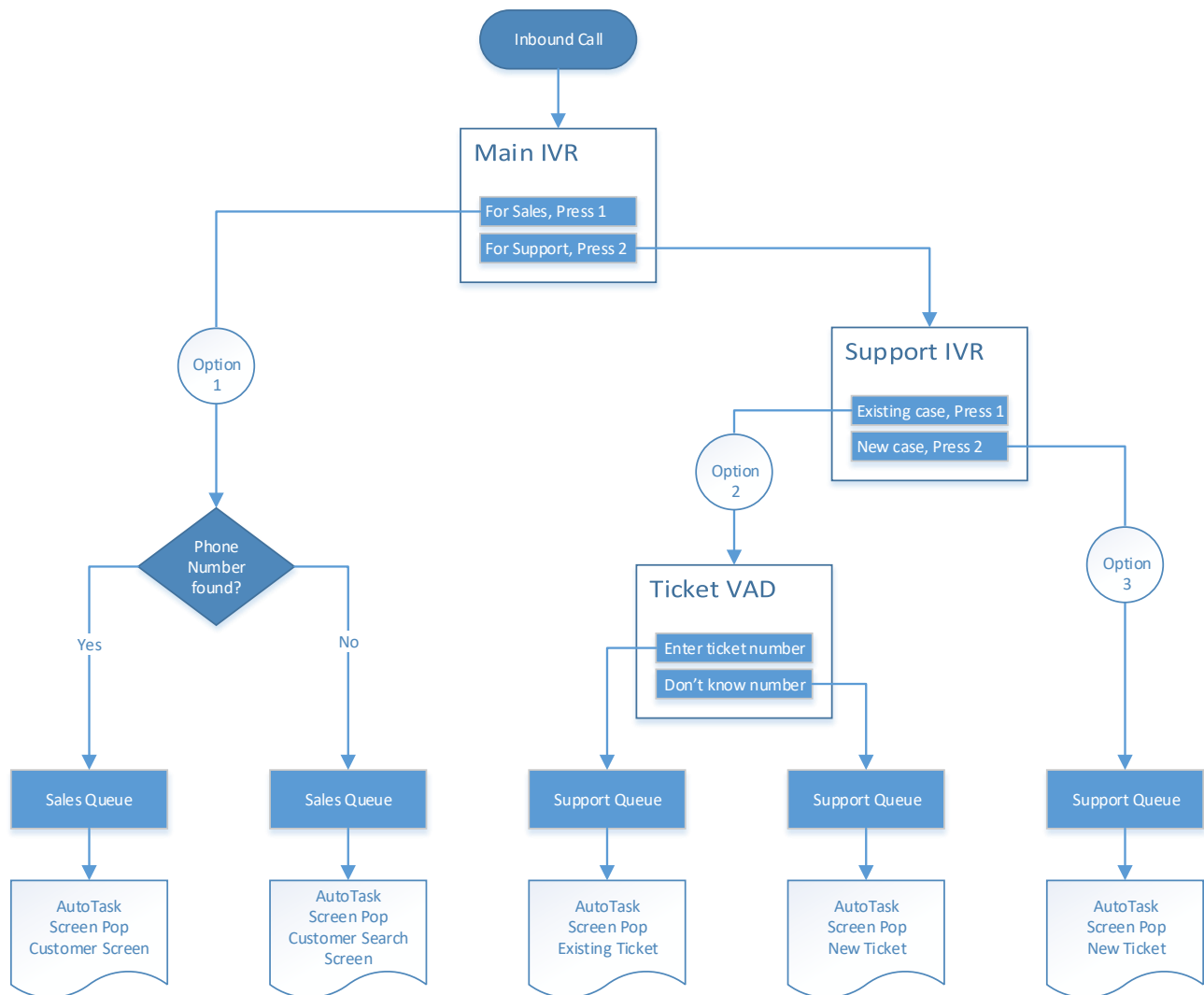


Figure 2: Inbound Call Routing Example

- Selecting “Sales” will direct the caller to a designated 3CX “Sales” queue. If the caller ID (phone number) is found in ConnectWise, the Company or Contact screen will display. If the phone number is not found in any of the phone fields the ConnectWise Company 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 ConnectWise, the ticket will display. If the ticket number cannot be found, the ConnectWise 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 ConnectWise.

Designating Sales and Support Queues

The 3CX CRM Plugin for ConnectWise 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 a Company 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 3CX ConnectWise Plugin desktop shortcut. This will open the ConnectWise 3CX Plugin Configuration screen below:

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



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

Screen Pops

When a call is received on a designated “Sales” queue, the 3CX Plugin for ConnectWise will search for the caller’s phone number in ConnectWise. If the phone number is found, the plugin will “pop” the caller’s contact information if the number is associated with a contact, or the Company if not associated with a contact within ConnectWise. From this screen the Agent can easily record notes about the conversation and access other relevant information about the caller.

If the caller’s phone number is not found within ConnectWise, the Company Search screen will display:

When an inbound call is received on a designated “Support” queue, a new ticket is created, summary information about the call is saved, and a recording of the conversation is attached to the ticket (if the call was recorded).

In some situations the plugin can’t automatically create a ticket. For example, if the caller’s phone number was not found in ConnectWise the Agent will first need to find the caller or create a new contact record – then manually create a ticket for the call. After the ticket has been created and the call is finished, the plugin will prompt the agent for the ticket number. This dialog enables the agent to associate call summary information and attach a recording of the call (assuming the call was recorded) to the correct ticket.

When the 3CX CRM Plugin for ConnectWise Integration Server was installed on the 3CX server, a specialized Digital Receptionist was created (see installation guide). This Digital Receptionist prompts the caller to enter their ticket number, or, if they don’t know their ticket number, to press “*”. The caller is then forwarded to the designated “Support” queue.

If the caller entered their ticket number, the plugin will automatically pop the correct ticket on the Agent's screen. If the ticket number entered by the caller is not found, a warning stating the ticket does not exist will display on the new Service Ticket screen. If the caller pressed "*", the Company ticket search screen will display.

Live Links (Outbound Calls)

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

Navigating to a ConnectWise Company, Contact, or Ticket screen displays a "Links" combo box on the screen. Selecting the live link will display a "Live Link" dialog that lists one or more phone numbers. In the example above, selecting "3CX Company Phone Control" from the Company 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 Contact containing summary information about the call, and
3. Attach a recording of the call to the Company (provided the call was recorded).

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